



CALUNIVERSITY

MGT 525

**STRATEGIC HUMAN RESOURCE
MANAGEMENT**

STUDY GUIDE

Textbook: *Human Resource Management, Thirteenth Edition*

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Please Note: Some chapters of the textbook may not be included in the Study Guide. The content of the excluded chapters is not within the scope of the course objectives. Learners are encouraged to read all textbook chapters as supplementary reading.

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HOW TO USE THIS GUIDE

Dear CalUniversity Student:

This Study Guide is intended to facilitate understanding of key learning points found in the textbook. Read this guide as you go through each unit of your course. Reflect on the 'Ask Yourself' questions as a **TRA** (Transfer, Retention, and Application) method. The guide is organized as follows:

- An overview of learning objectives
- Key learning points of each chapter
- Chapter Practice Exams
- Weekly Discussion Questions
- Unit Exams
- Unit Case Study
- Week 6 Discussion Question
- End of Course Survey
- Final Exam
- Week 6 Project
- Course Presentation

This guide is not a substitute for the textbook. The Summary at the end of each Chapter of the textbook highlights the learning points for each chapter and must be read.

You must read the Syllabus and other documents posted in the Course Document folder of your Course Room so you will understand how to maximize learning and earn the desired grade.

In the Syllabus you will find important information such as:

- Grading requirements
- Definition of Credit Hours
- Study schedule
- Helpdesk information

You will find your course instructor's information including contact information and qualifications in the Instructor Policies document in the course room. Please do not hesitate to contact your course instructor if you have any questions.

Office of Academic Affairs
California InterContinental University

ACADEMIC INTEGRITY POLICY:

Ideas and learning form the core of the academic community. In all centers of education, learning is valued and honored. No learning community can thrive if its members compromise their achievement and seek to establish an unfair advantage over their fellow student/learners. The academic standards are based on a pursuit of knowledge and assume a high level of integrity in every one of its members.

When this trust is violated, the academic community suffers injury and must act to ensure that its standards remain meaningful. The vehicle for this action is the Academic Integrity Policy outlined in CalUniversity's Student Handbook.

The Academic Integrity Policy is designed to foster a fair and impartial set of standards upon which academic dishonesty will be judged.

All student/learners are required to read, understand, and adhere to these standards, which define and specify the following mandatory sanctions for such dishonest acts as copying, plagiarism, lying, and unauthorized collaboration, alteration of records, bribery, or misrepresentation for the purpose of enhancing one's academic standing.

Please comply with the following:

1. Please read your Instructor's policy on submitting papers for plagiarism check and the consequences of plagiarism
2. Sign and submit the Probity Form (See Course Room Important Documents) to the General Discussion Forum
3. Submit your paper for plagiarism check (Go to the Student Resource Center). The similarity index should not be higher than 20%. If it is higher than 20%, reduce the percentage by deleting or paraphrasing the words identified as matching other papers. Submit your papers for grading only after you have taken this step.
4. Know the consequence of plagiarism:
 - a. First Offense – Instructor's discretion (See Instructor Policies)
 - b. Second Offense – "F" grade; student to attend and complete plagiarism workshop
 - c. Third Offense – "F" grade; student placed on academic probation/dismissal

If you need more information on plagiarism, contact your Student Advisor to register for a workshop on how to avoid plagiarism.

COURSE OVERVIEW

MGT 525: Strategic Human Resource Management

Course Description:

This course is designed to explore trends that affect human resource management practices when applied strategically and contrasted with a more traditional one. This course explores the design of work systems and relevant employment laws that influence the practice of managing people in organizations. Strategic issues are examined while developing specific programs and policies related to traditional functional areas of HR such as staffing, training, performance management, compensation, labor relations, employee separation, and managing a global workforce.

- Course Objectives To discuss the importance of strategic human resource management and compare the strategy with traditional human resource model.
- To describe and explain strategic organizational decisions for human resource planning, recruiting, and retaining staff.
- To analyze the impact of globalization on strategic human resource management and strategic decision-making processes.

Learning Outcomes (LO):

At the end of the course, student/learners will be able to:

- LO 1. Explain the context challenges, and models of strategic human resource management.
- LO 2. Explain the importance of equal employment opportunity laws and evaluate their impact.
- LO 3. Identify and protect against discriminatory practices and harassment in the workplace.
- LO 4. Explain the importance of strategic planning and strategic human resource management.
- LO 5. Implement strategies for personnel planning and recruitment.
- LO 6. Implement strategies for conducting effective interviews.
- LO 7. Implement strategies for training and managing organizational change,
- LO 8. Implement strategies for performance management and feedback.
- LO 9. Evaluate the importance of a comprehensive approach to retaining and engaging employees.
- LO 10. Identify and evaluate the important factors in determining pay rates and employing a market-competitive pay plan.
- LO 11. Explain the different benefits and benefit plans available to employers and employees.

- LO 12. Argue why ethical behavior is important at work and be able to identify the factors that shape ethical behavior at work.
- LO 13. Employ strategies for effective labor relations and employee separation.
- LO 14. Explain the history of the American labor movement, the impact of labor legislation, and the role of unions.
- LO 15. Employ strategies for occupational health and workplace safety.
- LO 16. Identify the human resource challenges of international business.
- LO 17. Employ strategies for both global and small business human resource management.

UNIT ONE

Chapters & Learning Outcomes

The key points of the following chapters (see textbook) will be discussed in this Unit:

- **Chapter One**
Introduction to Human Resource Management pages 2 to 29
- **Chapter Two**
Equal Opportunity and the Law pages 30 to 69
- **Chapter Three**
Human Resource Management Strategy and Analysis pages 70 to 101

UNIT ONE LEARNING OUTCOMES

This Unit meets the following learning outcomes:

- LO 1. Explain the context challenges, and models of strategic human resource management.
- LO 2. Explain the importance of equal employment opportunity laws and evaluate their impact.
- LO 3. Identify and protect against discriminatory practices and harassment in the workplace.
- LO 4. Explain the importance of strategic planning and strategic human resource management.

CHAPTER ONE

Introduction to Human Resource Management

KEY LEARNING POINTS

The chapter begins by discussing the human resource management practices at L. L. Bean and the impact they have on their customer service strategy. **(Page 3)**

Each chapter in this book also begins with its learning objectives as well as a “Where Are We Now...” to help frame the information you will be learning within the Human Resource management strategy.

WHAT IS HUMAN RESOURCE MANAGEMENT AND WHY IS IT IMPORTANT? (Pages 4 to 10)

Read **Page 4** to answer the question **What Is Human Resource Management?**

The five functions in the **management process** are discussed on **page 4**. These five functions are: **Planning, Organizing, Staffing, Leading, and Controlling**. In this course you will be focusing on the staffing function (aka personnel management or **human resource management (HRM) (page 4)**. Read this section to better understand the HRM concepts and techniques that will be discussed in this book as well as some of the things managers should know about, both listed on **page 4**. Some other key terms you should be familiar with from this section are: **organization (page 4)** and **manager (page 4)**.

Ask yourself: How much do I already know about human resource management? Was I surprised by any of the personnel aspects underneath the HRM umbrella?

Read **pages 5 to 6** to answer the question **Why Is Human Resource Management Important to All Managers?**

Page 5 discusses how HRM can help managers **Avoid Personnel Mistakes** and managers **Improve Profits and Performance**. Read these sections and make sure you are familiar with the list of mistakes managers *do not* want to make and the ways in which HRM can help managers in *getting results* via their employees.

Page 6 discusses two other ways this textbook can benefit managers: **You Too May Spend Time As An HR Manager** and, if you are starting your own business, you may become your own HR manager, discussed in **HR For Entrepreneurs**.

Ask yourself: Why is studying human resource management important to my organization and me?

Page 6 discusses **Line and Staff Aspects of Human Resource Management**. Read this section to better understand the responsibilities of line and staff human resource managers. Some key terms from this section that you should also be familiar with: **authority, line authority, staff authority, line managers, and staff managers**.

Read **Line Managers' Human Resource Duties** on **page 7** and make sure you are familiar with the types of HR responsibilities given to a Line Manager.

Read **Human Resource Manager's Duties** on **pages 7 to 9** and make sure you are familiar with the three distinct functions carried out by the *human resource manager*, listed on **page 7**:

1. **A line function**
2. **A coordinative function**
3. **Staff (assist and advise) functions**

Several examples of human resource specialties are listed on **page 8**. These include: **recruiters, equal employment opportunity (EEO) coordinator, job analysts, compensation managers, training specialists, and labor relations specialists**.

Ask yourself: In what HR specialty am I most interested? Where am I on the path to getting there?

Examine **Figure 1-1 (page 8)** to see an example HR organization chart for a very large company. The HR organization for a small company is shown in **Figure 1-2 on page 9**.

Read **page 9** and make sure you are familiar with the **New Approaches to Organizing HR** and the IBM example given in the text.

Ask yourself: How do I feel about these new organizational approaches? Are they something I would consider implementing at my organization?

Pages 9 and 10 discuss **Cooperative Line and Staff HR Management: An Example**. Read this section and examine **Figure 1-3 (page 10)** to better understand how these positions work together.

THE TRENDS SHAPING HUMAN RESOURCE MANAGEMENT (Pages 10 to 17)

This section discusses how the role of HR managers is changing. Examine **Figure 1-4 (page 11)** to better understand some of these trends.

Pages 11 to 12 discuss **Globalization and Competition Trend**. Read this section and make sure you understand **globalization (page 11)** and its impact.

Read about the impact of **Indebtedness ("Leverage") and Deregulation** and **Technological Trends** on **page 12**.

Page 13 discusses **Trends in the Nature of Work**. Read this section and make sure you are familiar with the following trends: **High-Tech Jobs, Service Jobs, and Knowledge Work and Human Capital**.

Ask yourself: What have I witnessed in terms of changing nature of work trends?

Read **HR as a Profit Center** on **page 14** for a comparison between two banks on boosting customer service.

Page 14 to 16 discusses **Workforce and Demographic Trends**. Read this section and make sure you are familiar with the following trends: **Demographic Trends, “Generation Y”, Retirees, Nontraditional Workers, and Workers from Abroad**. Examine **Table 1-1 (page 14)** to better understand the changing demographics of the workforce.

Ask yourself: What have I witnessed in terms of changing workforce and demographic trends?

The effect of **Economic Challenges and Trends** on HRM is discussed on **Pages 16 to 17**. Read this section and examine **Figures 1-5 and 1-6** on **page 15** to better understand these trends.

Ask yourself: How have I felt the recent economic upheaval? How has this impacted the way I view today’s HRM?

THE NEW HUMAN RESOURCE MANAGERS (Pages 17 to 22)

Read this section to better understand the ways human resource management practices have been changing. **Page 17** discusses **Human Resource Management Yesterday and Today**.

Read **pages 17 to 21** to better understand 10 characteristics of today’s HR professionals. The 10 traits are:

- **They Focus More on Strategic, Big Picture Issues (Pages 17 to 18)**
- **They Use New ways to Provide Transactional Services (Pages 18 to 19)**
- **They Take an Integrated, “Talent Management” Approach to Managing Human Resources (Page 19)**
- **They Manage Ethics (Page 19)**
- **They Manage Employee Engagement (Page 19)**
- **They Measure HR Performance and Results (Pages 19 to 20)**
- **They Use Evidence-Based Human Resource Management (Page 20)**
- **They Add Value (Page 20)**
- **They Have New Competencies (Page 21)**

Ask yourself: How many of these traits do I feel prepared to embrace? Are there any that I was unaware or surprised by?

You should also be familiar with **talent management (page 19)**, discussed in **What is Talent Management?** on **page 19**, and **Sample Metrics (page 20)**.

The Human Resource Manager's Competencies are discussed on **page 21** and illustrated in **Figure 1-7 (page 21)**. These include: **Talent Managers / Organization Designers, Culture and Change Stewards, Strategy Architects, Operational Executors, Business Allies, and Credible Activists.**

Ask yourself: How many of these new competencies do I see in myself? Are there any I need to work on? What steps will I take to maintain or improve these traits in myself and my work?

HR Certification is discussed on **Page 22.**

THE PLAN OF THIS BOOK (Page 22)

The Basic Themes and Features of this textbook are discussed in this section. **(Page 22)** Familiarize yourself with them and their purpose, as they will continue to appear throughout this textbook.

CHAPTER CONTENTS OVERVIEW (Pages 23 to 24)

Read this section for a brief overview of each of the chapters in this book and the different topics you will be studying in the coming weeks. Examine **Figure 1-8 (Page 24)** to better understand how these topics are all interrelated.

Activities

Chapter One Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week One section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week One Discussion Question (Chapter One):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

According to the text, there are 10 characteristics of today's HR professionals, discuss which three you think are most important and why? Include a brief description of all 10 traits in your answer.

[Note: Your instructor will post the question to the Week One Weekly Discussion Question Forum]

CHAPTER TWO

Equal Opportunity and the Law

KEY LEARNING POINTS

EQUAL EMPLOYMENT OPPORTUNITY 1964-1991 (Pages 32 to 35)

This section discusses the civil rights and equal employment opportunity laws that went into effect between 1964 and 1991.

Page 32 discusses **Title VII of the 1964 Civil Rights Act**. Read about this act and make sure you understand its significance, who it covers, and how it established the **Equal Employment Opportunity Commission (EEOC)** (page 32).

Ask yourself: What changes in today's workplaces and workforce do I see as a direct result of Title VII of the 1964 Civil Rights Act?

Pages 32 to 34 discuss **Executive Orders**, the **Equal Pay Act of 1963** (page 33), the **Age Discrimination in Employment Act of 1967** (page 33), the **Vocational Rehabilitation Act of 1973** (page 33), and the **Pregnancy Discrimination Act of 1978** (page 34). Make sure you read these sections and understand each of these laws, their effect on employers and employees, and how they work to help prevent discrimination in the workplace.

Ask yourself: Did any of the protections under these laws surprise me? Why or why not?

Page 34 discusses **Federal Agency Guidelines**. Make sure you read this section and understand **uniform guidelines** (page 34).

Read about the **Early Court Decisions Regarding Equal Employment Opportunity** on pages 34 and 35. You should be familiar with **protected classes** (page 34) and both **Griggs v. Duke Power Company** (pages 34 to 35) and **Albemarle Paper Company v. Moody** (page 35).

EQUAL EMPLOYMENT OPPORTUNITY 1990-91-PRESENT (Pages 35 to 43)

This section discusses the civil rights and equal employment opportunity laws that went into effect from 1990 to the present.

Pages 35 to 36 discuss **The Civil Rights Act of 1991**. Read this section and make sure you better understand its impact on **Burden of Proof** (page 36), **Money Damages** (page 36), and **Mixed Motives** (page 36).

Ask yourself: How have I seen the impact of The Civil Rights Act of 1991?

Pages 36 to 39 discuss **The Americans with Disabilities Act**. The 1990 **Americans with Disabilities Act (ADA)** prohibited discrimination against many disabled individuals. Read this section and make sure you understand the specifics of the act, who it protects, and what it requires of employers. **Mental Impairments and the ADA (pages 36 to 37)** discusses the high number of ADA claims come from mental disabilities and what employers should do to make reasonable accommodations. The act, however, only prohibits discrimination against **Qualified Individuals (page 37)** who, “with (or without) a reasonable accommodation, can carry out the *essential functions* of the job.” Read more about **Reasonable Accommodation** on **page 37** and examine **Figure 2-1 (page 37)** for examples of how employers can provide it. Read **Traditional Employer Defenses (pages 37 to 38)** to better understand why many employers prevailed in ADA court decisions and **The “New” ADA** to better understand how the ADA Amendments Act of 2008 helped employees prove that their disabilities are limiting. Make sure you examine **Figure 2-2** for a summary of important ADA guidelines for managers and employers.

Ask yourself: Do I, or does anyone I know, have a disability that would be protected under the ADA? How will I make sure my organization accommodates to employees with disabilities?

Read **page 39** to better understand the **Genetic Information Nondiscrimination Act of 2008 (GINA)**, which prevents discrimination on the basis of someone’s genetic information.

Page 39 also discusses **State and Local Equal Employment Opportunity Laws**. Read this section and **Enforcing Equal Employment Laws with International Employees** on **page 39** and make sure you are familiar with the guidelines listed in the text. Examine **Table 2-1** on **page 40** for a summary of selected important EEO actions.

Pages 39 to 43 discuss **Sexual Harassment**. **Page 41** answers the question **What is Sexual Harassment?** There are three main ways to prove sexual harassment, discussed in **Proving Sexual Harassment** on **page 41**:

1. **Quid Pro Quo**
2. **Hostile Environment Created by Supervisors**
3. **Hostile Environment Created by Coworkers or Nonemployees**

Pages 41 to 42 discuss **When is the Environment Hostile?**, important **Supreme Court Decisions** and their **Implications**, what to do **When the Law isn’t Enough**, and **What Employees Can Do**.

Make sure you read these sections. You should also be familiar with the **Federal Violence Against Woman Act of 1994 (page 40)**.

Ask yourself: Have I ever experienced or witness sexual harassment? How did I react?

DEFENSES AGAINST DISCRIMINATION ALLEGATIONS (Pages 43 to 48)

This section discusses how employers defend themselves against employment discrimination claims. **Page 43** briefly reviews some important legal terminology. Make sure you are familiar with the key term: **adverse impact (page 44)**.

Pages 44 to 46 discuss **The Central Role of Adverse Impact**. Read this section and make sure you are familiar with the following:

- **How Can Someone Show Adverse Impact?**
- **Disparate Rejection Rates**
- **The Standard Deviation Rule**
- **Restricted Policy**
- **Population Comparisons**
- **McDonnell-Douglas Test**
- **Adverse Impact Example**

Pages 46 to 47 discuss **Bona Fide Occupational Qualification**. Make sure you understand how **Age, Religion, Gender, and National Origin** can all be BFOQs.

Pages 47 to 58 discuss the **Business Necessity** defense.

Read **Other Considerations in Discriminatory Practice Defenses** on **page 48** for three other points to remember.

ILLUSTRATIVE DISCRIMINATORY EMPLOYMENT PRACTICES (Pages 48 to 51)

Read **A Note on What You Can and Cannot Do** on **pages 49 and 50**.

Page 49 discusses potential discriminatory **Recruitment** practices, including: **Word of Mouth, Misleading Information, and Help Wanted Ads**.

Ask yourself: Which of these potential discriminatory recruitment practices surprised me as being discriminatory?

Pages 49 to 50 discuss potential discriminatory **Selection** practices, including: **Educational Requirements, Tests, Preference to Relatives, Height, Weight, and Physical Characteristics, Arrest Record, Application Forms, and Discharge Due to Garnishment**.

Ask yourself: Which of these potential discriminatory selection practices surprised me as being discriminatory?

Read **pages 50 to 51** for **Sample Discriminatory Promotion, Transfer, and Layoff Practices**, including **Personal Appearance Regulations and Tile VI**.

Make sure you are also familiar with the tips given in **What the Supervisor Should Keep in Mind** on **page 51**.

EEOC ENFORCEMENT PROCESS (Pages 51 to 54)

This section discusses the steps in the EEOC enforcement process. Examine **figure 2-3** for an overview of the process. The steps are:

- **File Charge**
- **Charge Acceptance**
- **Serve Notice**
- **Investigation / Fact-Finding Conference**
- **Cause / No Cause**
- **Conciliation**
- **Notice to Sue**

Make sure you read about the above steps. You should also be familiar with **Voluntary Mediation (pages 52 to 54)**, **Mandatory Arbitration of Discrimination Claims (page 54)**, and the key term: **alternative dispute resolution or ADR program**. See **Figure 2-4** for question to ask when the EEOC gives an employer notice of filed bias claim. **Figure 2-5** has several management guidelines for addressing EEOC claims.

Ask yourself: How would I handle an EEOC claim against my firm?

DIVERSITY MANAGEMENT AND AFFIRMATIVE ACTION PROGRAMS (Pages 55 to 61)

This section discusses the importance of **diversity (page 55)**, and diversity management, in the workplace.

Pages 55 to 56 discuss **Diversity's Potential Pros and Cons**. Make sure you read this section and understand both the cons, discussed in **Some Diversity Downsides (Page 55)**, and the pros, discussed in **Some Diversity Benefits (Page 56)**. You should also be familiar with the following key terms from this section, defined on **page 55**: **stereotyping, discrimination, tokenism, ethnocentrism, gender-role stereotypes**.

Pages 56 to 57 discuss **Managing Diversity**. Read this section and make sure you are familiar with how **Top-Down Programs** can **provide strong leadership, assess the situation, provide diversity training and education, change culture and management systems, and evaluate the diversity management program**.

Page 57 discusses **Encouraging Inclusiveness**. Examine **Figure 2-6** to better understand strategies managers can use to overcome inclusion barriers.

Ask yourself: Which of these strategies will I use in my organization to overcome inclusion barriers?

Pages 58 to 59 discuss **Developing a Multicultural Consciousness**. Read this section and make sure you are familiar with the five steps that can help develop one’s “diversity consciousness.”

Ask yourself: What steps will my organization take to help encourage diversity consciousness amongst my employees?

Equal Employment Opportunity Versus Affirmative Action is discussed on **page 59**.

Pages 59 and 60 discuss **Implementing the Affirmative Action Program**. Read this section and make sure you are familiar with what it means for employers to pursue the aims of affirmative action with a **good faith effort (page 59)**. Examine **figure 2-7 (page 60)** for a list of reasonable steps. Make sure you also read about **Recruiting Minorities Online (page 59)**, **Employee Resistance (page 59)**, and **Program Evaluation (page 60)**.

Read **pages 60 and 61** and make sure you understand **Reverse Discrimination (page 60)**.

Ask yourself: Have I ever witnessed reverse discrimination?

Activities

Chapter Two Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week One section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week One Discussion Questions (Chapter Two):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Many different laws affecting women were discussed in the text. Discuss the protections women now have thanks to equal opportunity laws over the last fifty years. Include a brief summary of the specific laws that have led to this in your answer.

[Note: Your instructor will post the question to the Week One Weekly Discussion Question Forum]

CHAPTER THREE

Human Resource Management Strategy and Analysis

KEY LEARNING POINTS

THE STRATEGIC MANAGEMENT PROCESS (Pages 72 to 80)

Read **The Strategic Context** on **page 72** to see an example of the strategic human resource management process in action.

Ask yourself: What can I learn from the Shanghai Portman Hotel’s example to use in my own strategic HR management?

Page 72 discusses **Goal-Setting and the Planning Process**. Read this section to better understand the basic *planning process*. Planning is goal-oriented. Read **The Hierarchy of Goals**, also on **page 72**, and examine **Figure 3-1 (page 73)**, to better understand how these goals are traditionally viewed from the top down.

Ask yourself: What are some goals for my organization from the top down?

Pages 73 to 76 discuss **Strategic Planning**. A company forms a **strategic plan (page 73)** to ask, “Where are we now? Where to do we want to be? And how should we get there?” Some other key terms you should know from this section are **strategy** and **strategic management**, both on **page 73**. The strategic management process, and its seven steps, is illustrated in **Figure 3-2 on page 73**. Make sure you read this section and are familiar with each of the following steps in the strategic management process:

- **Step 1: Define the Current Business (Page 74)**
- **Step 2: Perform External and Internal Audits (Pages 74 to 75)**
 - Examine the worksheet in **Figure 3-3 (page 74)** to better understand how managers can audit a firm’s environment.
 - Make sure you are familiar with the generic SWOT (strengths, weaknesses, opportunities, threats) chart in **Figure 3-4 (page 75)** and why it’s an important tool.
- **Step 3: Formulate a New Direction (Page 75)**
 - Make sure you are familiar with how a firm formulates a **vision statement (page 75)** to show its intended direction.
- **Step 4: Translate the Mission into Strategic Goals (Page 75)**
- **Step 5: Formulate Strategies to Achieve the Strategic Goals (Page 76)**
- **Step 6: Implement the Strategies (Page 76)**
- **Step 7: Evaluate Performance (Page 76)**

Read **Improving Productivity Through HRIS** on **page 76** to see how businesses can use computerized planning software to assist in writing their strategic plans.

Ask yourself: Can my organization benefit from computerized planning software? Why or why not?

Pages 76 to 78 discuss the different **Types of Strategies**. Make sure you read this section and understand the three strategies formed by managers: **Corporate-Level Strategy (page 77)**, **Competitive Strategy (page 77)**, and **Functional Strategy (page 78)**. They are also illustrated in **Figure 3-5 on page 76**. You should also be familiar with **competitive advantages**, discussed on **page 77** with several standard examples, and why managers work to achieve them. Read about **Human Resources as a Competitive Advantages** on **pages 77 and 78**. Make sure you also understand the concept of **Strategic Fit** discussed on **page 78**.

Ask yourself: What are some of the competitive advantages my firm is endeavoring to achieve?

Read **pages 78 to 79** to better understand **Top Managers' Roles in Strategic Planning** and **Departmental Managers Roles in Strategic Planning**. Specifically departmental managers help top managers do the following: **They Help Devise the Strategic Plan, They Formulate Supporting, Functional / Departmental Strategies, and They Execute the Plans**.

Pages 79 and 80 discuss **Department Managers' Strategic Planning Roles in Action: Improving Mergers and Acquisitions**. Read this section to better understand the strategic importance of mergers and acquisitions and the critical role HR can play in those strategic moves. Make sure you are familiar with the **Due Diligence Stage (page 80)** and the list of HR services that can help facilitate a merger discussed in **Integration Stage on page 80**.

Ask yourself: What personnel related issues have I seen as a result of a merger, either at a company I was part of or one I heard about? How do I think HR could have helped that situation?

STRATEGIC HUMAN RESOURCE MANAGEMENT (Pages 80 to 83)

Read **Defining Strategic Human Resource Management** on **pages 80 to 81** to better understand **strategic human resource management (page 80)**. The connection between a company's strategic plan and its human resource strategy is shown in **Figure 3-6 (page 81)**. The basic idea behind strategic human resource management is illustrated in **Figure 3-7 (page 81)**.

Page 82 discusses **Human Resource Strategies and Policies**. Read this section and the Albertson's example presented in **HR as a Profit Center**, also on **page 82**.

Pages 82 to 83 discuss **Strategic Human Resource Management Tools** and describe three important tools: **Strategy Map (page 82)**, **The HR Scorecard (pages 82 to 83)**, and **Digital Dashboards (page 83)**. These are illustrated in **Figure 3-9 on page 84**. An example strategy map is shown in **Figure 3-8 (page 83)**. Make sure you read this section and are familiar with each of these tools.

Ask yourself: How can my organization benefit from these tools?

HR METRICS AND BENCHMARKING (Pages 84 to 91)

This section discusses how to measure HR management, an integral piece of the HR strategy process. Read this section and make sure you are familiar with how this measurement is done.

The different **Types of Metrics** are discussed on **page 85** and illustrated in **Figure 3-10 (page 85)**.

Read **Improving Productivity Through HRIS** on **page 85** to better understand how tracking applicant metrics can improve talent management.

To understand how a company measures how they are doing in relation to something read **Benchmarking in Action** on **pages 86 and 87**. Also examine the example benchmarking measures shown in **Figure 3-11 (page 86)**.

Ask yourself: How should my organization be using benchmarking to improve?

Page 87 discusses **Strategy and Strategy-Based Metrics**. Read this section, and review the example, to better understand why managers use **strategy-based metrics (page 87)**.

Pages 87 to 88 discuss **Workforce / Talent Analytics and Data Mining**. Read **Data Mining** and **HR is a Profit Center** on **page 88** to understand how companies can benefit from using workforce / talent analytics and the six types of talent management questions they are answering.

Ask yourself: How can my organization benefit from data mining?

Pages 89 to 90 answers **What are HR audits?** Read this section to better understand an **HR audit (page 89)**, its main functions, goals, and the typical broad areas it covers.

Ask yourself: What benefits do I see for my organization (or for any organization) from doing an HR audit?

Pages 90 to 91 discuss **Evidence-Based HR and the Scientific Way of Doing Things**. Read this section to better understand how today's HR managers are striving to make decisions based on evidence. **How to be Scientific (page 90)** discusses how HR managers do this by being *objective* and through *experimentation*. **Page 91** explains **Why Should a Manager be Scientific?** and gives **Examples** of this evidence-based approach.

Ask yourself: Will I use an evidence-based HR approach? Why or why not?

WHAT ARE HIGH-PERFORMANCE WORK SYSTEMS? (Pages 91 to 93)

Read this section to better understand **high-performance work systems** and how they produce "superior employee performance." (**Page 91**)

Pages 92 to 93 discuss **High-Performance Human Resource Policies and Practices**. Read this section and examine **Table 3-1 (page 92)**. According to the text, Table 3-1 illustrates four things; make sure you are familiar with each of these findings as well as **human resource metrics (page 92)**.

Ask yourself: How will I implement a high-performance work system at my firm?

Activities

Chapter Three Practice Exam:

Click on the link to test your competency. Good Luck!

Week One Discussion Questions (Chapter Three):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Describe the benefits of creating and enacting a strategic plan. Include a brief explanation of each of the seven steps.

[Note: Your instructor will post the question to the Week One Weekly Discussion Question Forum]

UNIT ONE ASSIGNMENTS

Unit One Exam

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week One section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Unit One Case Study

Read the APPLICATION CASE in pages 63 to 64 on “An Accusation of Sexual Harassment in Pro Sports.”

Write a 3 to 5 page paper (1000 to 1500 words) in APA format in response to the five questions listed in item 3 below in the recommended outline.

1. Cover page (See APA Sample paper)
2. Introduction
 - a. A thesis statement
 - b. Purpose of paper
 - c. Overview of paper
3. Body (Cite sources with in-text citations.)
 - a. Explain whether or not you think Ms. Browne Sanders had the basis for a sexual harassment suit and why?
 - b. Argue whether you think the jury arrived at the correct decision or not.
 - c. Give suggestions on steps Garden management could have taken to protect itself from liability in this matter.
 - d. Explain what you would do now if you were the Garden’s top management.
 - e. Explain the reasons why you agree or disagree with the statement given in question #5.
4. Conclusion – Summary of main points
 - a. Lessons Learned and Recommendations
5. References – List the references you cited in the text of your paper according to APA format.
(Note: Do not include references that are not cited in the text of your paper)

GRADING

Your instructor will provide a grading rubric to evaluate your paper. Please see the Instructor Syllabus and Policies for details.

Submit your paper to the assignment link.

UNIT TWO

Chapters & Learning Outcomes

The key points of the following chapters (see textbook) will be discussed in this Unit:

- **Chapter Five**
Personnel Planning and Recruiting pages 136 to 173
- **Chapter Seven**
Interviewing Candidates pages 212 to 241
- **Chapter Eight**
Training and Developing Employees pages 242 to 281

UNIT TWO LEARNING OUTCOMES

This Unit meets the following learning outcomes:

- LO 5. Implement strategies for personnel planning and recruitment.
- LO 6. Implement strategies for conducting effective interviews.
- LO 7. Implement strategies for training and managing organizational change.

CHAPTER FIVE

Personnel Planning and Recruiting

KEY LEARNING POINTS

INTRODUCTION (Page 138)

Read this section and make sure you are familiar with the list of the steps in the recruitment and selection process. These steps are also illustrated in **Figure 5-1 (page 138)**.

WORKFORCE PLANNING AND FORECASTING (Pages 138 to 146)

This section discusses the process of deciding what positions an organization will need to fill and how to fill them. This is known as **workforce (or employment or personnel) planning (page 138)**.

Pages 138 to 139 discuss **Strategy and Workforce Planning**. Read this section and examine **Figure 5-2 (page 139)** to better understand the link between a firm's strategy and their personnel planning.

Read **The Strategic Context** to see how IBM's personnel plan reflects its overall strategy.

Pages 139 to 142 discuss **Forecasting Personnel Needs (Labor Demand)**. This section examines how managers answer the question: "How many people do we need?" Read this section and make sure you are familiar with the following projection tools discussed in the text:

- **Trend Analysis (Page 140)**
- **Ratio Analysis (Page 140)**
- **The Scatter Plot (Pages 140 to 141)**
- **Markov Analysis (Pages 141 to 142)**

Ask yourself: Which of these projection tools (or a combination of several) do I think would be most helpful in forecasting my organizations personnel needs and why?

Read **Improving Productivity Through HRIS** on **page 142** to see how managers can use computerized forecasts to help them more accurately predict their personnel needs.

Pages 142 to 144 discuss **Forecasting the Supply of Inside Candidates**. This section examines how managers can estimate their supply of inside candidates. This can be done with the help of **qualifications (or skills) inventories**.

Read this section and make sure you are familiar with the different tools managers can use to track employee qualifications. These include: **Manual Systems and Replacement Charts (pages 143 to 144)** and **Computerized Skills Inventories (page 143)**. You should also be familiar with the following keywords on **page 142: personnel replacement charts (shown in Figure 5-4 (page 143))** and **position**

replacement card. Read why it is important to keep this information private in **Keeping the Information Private** on **page 143**.

Page 144 discusses **Forecasting the Supply of Outside Candidates**. Read this section to better understand how managers can estimate the supply of outside candidates.

Pages 144 to 145 discuss **Talent Managers and Predictive Workforce Monitoring**. Read this section, and its examples, to better understand applying talent management philosophy to workforce planning in a continuous manner.

Page 145 also discusses **Developing an Action Plan to Match Projected Labor Supply and Labor Demand**.

Pages 145 to 146 discuss **The Recruiting Yield Pyramid**. Read this section and examine **Figure 5-6 (page 145)** to better understand the usefulness of a **recruiting yield pyramid (page 145)**.

THE NEED FOR EFFECTIVE RECRUITING (Pages 146 to 147)

This section discusses filling open positions through **employee recruiting (page 146)**.

Page 146 explains **Why Recruiting is Important** and answers the question **What Makes Recruiting a Challenge?**

Ask yourself: Why is recruiting important to my firm?

Pages 146 to 147 discuss **Organizing How You Recruit**. Read this section and make sure you understand **The Supervisor's Role**.

INTERNAL SOURCES OF CANDIDATES (Pages 147 to 148)

This section discusses why hiring from within can be one of the best sources for candidates.

Make sure you read **page 147** and are familiar with the pros and cons discussed under **Using Internal Sources: Pros and Cons**. You should also read **Finding Internal Candidates (page 147)** and be familiar with **job posting (page 147)**. The pros and cons of **Rehiring** are also discussed on **page 147**.

Ask yourself: How do I feel about using inside sources for candidates? Have I seen a positive or negative example of it at organizations where I've worked?

Page 148 discusses **Succession Planning**. Make sure you read this section and are familiar with the following three steps entailed in **succession planning (page 148)**:

Step 1: Identify Key Needs

Step 2: Develop Inside Candidates

Step 3: Assess and Choose

Read **Improving Productivity Through HRIS** on **page 148** to better understand the use of succession and talent planning systems.

OUTSIDE SOURCES OF CANDIDATES (Pages 149 to 162)

This section discusses outside sources organizations can use to find potential employees.

Pages 149 to 152 discuss **Recruiting via the Internet**. According to the text, Internet recruiting is the source of choice for most employers and jobs. See **Figure 5-7 (page 149)** for a list of some top online recruiting job boards. Read this section and make sure you are familiar with the major online sources as well the **Other Online Recruiting Practices, Texting, The Dot-Jobs Domain, and Virtual Job Fairs**, discussed on **pages 150 to 151**.

The **Pros and Cons** to web recruiting are discussed on **page 151**. The use of **applicant tracking systems (page 151)** is discussed under **Using Applicant Tracking (page 151)**. Make sure you read these sections and the example of an applicant tracking system at Sutter Health (**page 151**).

The effectiveness of web recruiting is discussed in **Improving Online Recruiting Effectiveness** and illustrated in **Figure 5-6**, both on **page 152**.

Ask yourself: How have I used the Internet to find and gain employment?

Pages 152 to 154 discuss **Advertising**. For effective help wanted ads employers need to be aware of two things: making sure they use the best medium for their position, discussed under **The Media (page 153)**, and how their ad is constructed, discussed in **Constructing (Writing) the Ad (page 153)**.

Ask yourself: Has the medium of a job posting ever affected my willingness to apply for it? What are some examples of bad ad construction that I have witnessed?

Pages 154 to 155 discuss the three main types of **Employment Agencies**. Read about **Public and Nonprofit Agencies** on **page 154** and **Private Agencies** on **pages 154 to 155**.

Pages 155 to 156 discuss **Temp Agencies and Alternative Staffing**. Make sure you are familiar with the **Pros and Cons**, discussed on **pages 155 to 156**, as well as **What Supervisors Should Know about Temporary Employees' Concerns (page 156)**. You should also be aware of the **Legal Guidelines (page 156)** and **Alternative Staffing (page 156)**.

Page 157 discusses **Offshoring and Outsourcing Jobs**. Read this section and make sure you understand why these practices are controversial and what special challenges employers face.

Ask yourself: What examples of offshoring and outsourcing have I seen in the last 5-10 years? What was the impact on those organizations' in-house workforces?

Pages 157 to 158 discuss **Executive Recruiters**. You should be familiar with the two types: *contingent* and *retained*, the **Pros and Cons**—discussed on **pages 157 and 158**—as well as the **Guidelines** in choosing a recruiter on **page 157**.

Ask yourself: Would my organization benefit from the use of a recruiter? Why or why not?

Page 158 discusses **On-Demand Recruiting Services**

Pages 158 to 159 discuss **College Recruiting**

- **On-Campus Recruiting Goals**
- **The On-Site Visit**

Pages 159 to 160 discuss **Referrals and Walk-Ins. Pros and Cons** and **Walk-Ins**

Page 160 discusses **Telecommuters**

Page 160 discusses **Military Personnel**

Page 160 discusses **Recruiting Source Use and Effectiveness. Table 5-1 (page 161)**

Page 161 discusses **Evidence-Based HR: Measuring Recruiting Effectiveness.**

Read **HR as a Profit Center** on **page 162.**

Read **Improving Productivity Through HRIS** on **page 162.**

RECRUITING A MORE DIVERSE WORKFORCE (Pages 162 to 164)

This section discusses the special steps required to recruit a more diverse work force.

Pages 162 to 164 look at several workforce groups in detail. Make sure you read each of these sections and are familiar with the special recruiting considerations of each group:

- **Single Parents (Pages 162 to 163)**
- **Older Workers (Page 163)**
- **Recruiting Minorities (Pages 163 to 164)**
 - Make sure you understand the three-part effort discussed on **page 164** under **Understand, Plan, and Implement.**
- **Welfare-to-Work (Page 164)**
- **The Disabled (Page 164)**

Ask yourself: How can my organization aim for a more diverse workforce with its recruiting practices?

DEVELOPING AND USING APPLICATION FORMS (Pages 164 to 167)

Pages 164 to 165 discuss the **Purpose of Application Forms.** Make sure you read this section and are familiar with the purpose of an **application form (page 164)**. An example application form is presented in **Figure 5-10.**

Page 166 discusses **Application Guidelines** that managers should keep in mind. You should also read about **Application Exaggeration** on **page 166.**

Pages 166 to 167 discuss **Application Forms and EEO Law**. Make sure you read this section and are familiar with the questions, listed in the text on **page 166**, that must comply with EEO laws. Also read about **Video Resumes** on **page 166** to better understand how they can be a potential source of discrimination claims.

Ask yourself: Have I ever seen or answered a question on an application that could have been a violation of EEO laws?

Page 167 discusses **Using Application Forms to Predict Job Performance**. Read this section to better understand how employers can use “biodata” to predict job performance.

Ask yourself: Have I ever given a company “biodata” on an application? If so, what types?

Page 167 also discusses **Mandatory Arbitration**. Read this section to better understand the pros and cons of requiring applicants to sign mandatory arbitration agreements.

Ask yourself: Have I ever been asked to sign a mandatory arbitration agreement and did I agree? Why or why not?

Activities

Chapter Five Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Two section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Two Discussion Questions (Chapter Five):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Two different sources of candidates were discussed in the text: *internal sources* and *outside sources*. Compare and contrast both types and explain which one you think is best and why?

[Note: Your instructor will post the question to the Week Two Weekly Discussion Question Forum]

CHAPTER SEVEN

Interviewing Candidates

KEY LEARNING POINTS

BASIC TYPES OF INTERVIEWS (Pages 214 to 221)

This section discusses the use of interviews as selection tool.

Read **The Strategic Context** on **page 214** to see how Whirlpool selects candidates.

Pages 214 to 215 discuss **Structured Versus Unstructured Interviews**. Read this section and make sure you are familiar with the differences between **unstructured (or nondirective) interviews (page 214)** and **structured (or directive) interviews (page 215)**. **Page 215** discusses **Which to Use?** as well as the importance of the **EEOC Aspects of Interviews**.

Examine **Figure 7-1 (page 216)** for a sample interview form and **Figure 7-3 (page 228)** for a list of sample interview questions.

Ask yourself: Do I prefer a structured or unstructured approach to interviewing candidates? Does my opinion differ when I am the interviewee?

Pages 215 to 218 discuss **Interview Content (What Types of Questions to Ask)**. Read this section to be understand classifying interviews by their “content.” According to the text, the following three types of questions are most important to work situations:

- **Situational Questions (and situational interviews) (Page 215)**
- **Behavioral Questions (and behavioral interviews) (Page 216)**
- **Other Types of Questions (Job-related Interview and stress interview) (Pages 216 to 217)**

Ask yourself: Have I ever participated in a stress interview? Did I know during or afterwards what was being tested?

Pages 218 to 220 help answer the question **How Should We Administer the Interview?** According to the text, interviews should be administered: *one-on-one* or *by a panel of interviewers, sequentially* or *all at once*, and *computerized* or *personally*. Read this section and make sure you understand each of these approaches, many of which are discussed in detail on **pages 218 to 220**:

- **Panel Interviews (Page 218)**
- **Phone Interviews (Pages 218 to 219)**
- **Video/Web-Assisted Interviews (Page 219)**
- **Computerized Interviews (Pages 219 to 220)**
- **Second Life (Page 220)**

- **Speed Dating (Page 220)**
- **Bain & Company Case Interview (Page 220)**

Some key terms from this section that you should also be familiar with: **unstructured sequential interview (page 218), structured sequential interview (page 218), panel interview (page 218), mass interview (page 218)**

Ask yourself: Which of these interview approaches have I participated in? Which of these approaches might benefit my organization?

HR as a Profit Center on **page 220** discusses the unique interview process at Great Western Bank.

Page 221 discusses **Three Ways to Make an Interview Useful**. Make sure you read this section and are familiar with the following three tips:

1. **Use Structured Situational Interviews**
2. **Carefully Select Traits to Assess**
3. **Beware of Committing Interview Errors**

THE ERRORS THAT UNDERMINE AN INTERVIEW'S USEFULLNESS (Pages 221 to 225)

This section examines common, avoidable errors made during the interview process.

Pages 222 to 225 discuss several common errors and how to avoid them. These include:

- **First Impressions (Snap Judgments) (Page 222)**
- **Not Clarifying What the Job Requires (Page 222)**
- **Candidate-Order (Contrast) Error and Pressure to Hire (Pages 222 to 223)**
- **Nonverbal Behavior and Impression Management (Page 223)**
- **Pages 223 to 224** discuss **Effect of Personal Characteristics: Attractiveness, Gender, Race (Pages 223 to 224)**
 - Make sure you also are familiar with the use **Employment Discrimination "Testers"** discussed on **page 224**.
- **Interview Behavior (Pages 224 to 225)**

Ask yourself: Have you ever felt (or witnessed) discrimination during an interview process due to a personal characteristic?

Make sure you read this section and are familiar with each of these errors, why they can undermine the usefulness of an interview, and how managers can best avoid making them.

Ask yourself: Have you ever made any of the above errors? If so, how will you work to avoid making that error again in the future?

Managing the New Workforce on **page 224** discusses how to handle applicant disability in an employment interview.

HOW TO DESIGN AND CONDUCT AN EFFECTIVE INTERVIEW (Pages 225 to 229)

One way to avoid interview errors is to use a structured interview. This section looks at how best to design a structured interview with job-relevant behavioral and situational questions.

Pages 225 to 226 discuss **Designing a Structured Situational Interview**. Make sure you read this section and are familiar with the following five steps in a **structured situational interview (page 225)**:

- Step 1: Analyze the Job**
- Step 2: Rate the Job's Main Duties**
- Step 3: Create Interview Questions**
- Step 4: Create Benchmark Answers**
- Step 5: Appoint the Interview Panel and Conduct Interviews**

Ask yourself: How can my interview process benefit from the use of this procedure?

Pages 226 to 229 discuss **How to Conduct an Effective Interview**. Make sure you read this section and are familiar with the following eight steps:

- Step 1: First, Make Sure You Know the Job**
- Step 2: Structure the Interview**
- Step 3: Get Organized**
- Step 4: Establish Rapport**
- Step 5: Ask Questions**
- Step 6: Take Brief, Unobtrusive Notes During the Interview**
- Step 7: Close the Interview**
- Step 8: Review the Interview**

Ask yourself: How can my interview process benefit from these steps? Were there any steps I was previously neglecting or unfamiliar with?

Figure 7-2 on **page 227** gives several example interview questions, including specific situational and behavioral questions. As mentioned earlier, **Figure 7-3** also gives a list of several example supplementary interview questions.

Page 229 discusses **Talent Management: Profiles and Employee Interviews**. Read this section and examine **Table 7-1** to better understand the use of profiles in employee selection.

Ask yourself: How can my interview process benefit from the use of profiles?

See **Appendix 1** on **pages 236 to 238** to better understand the three-step process of creating a structured interview guide.

See **Appendix 2** on **pages 238 to 240** for an Interview Guide for Interviewees.

Activities

Chapter Seven Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Two section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Two Discussion Questions (Chapter Seven):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Describe how to conduct an effective interview. Include a brief explanation of each of the eight steps in your answer.

[Note: Your instructor will post the question to the Week Two Weekly Discussion Question Forum]

CHAPTER EIGHT

Training and Developing Employees

KEY LEARNING POINTS

ORIENTING AND ONBOARDING NEW EMPLOYEES (Pages 244 to 246)

This section discusses the importance of orientation for new employees.

Read **Page 244** to better understand **The Purpose of Employee Orientation / Onboarding**. Make sure you are familiar with **employee orientation (page 244)** as well as the four orienting goals listed in the text.

Ask yourself: What has been my experience with orientation / onboarding as an employee?

Pages 244 to 246 discuss **The Orientation Handbook**. Read this section and examine **Figure 8-1 (page 245)** to better understand the information and topics typically covered in a traditional orientation. Read more about the legalities of **The Employee Handbook** on **pages 244 to 245**. The ways employers can utilize technology to orient employees is discussed in **Orientation Technology** on **Page 246**.

OVERVIEW OF THE TRAINING PROCESS (Pages 246 to 253)

Training (page 246) should begin after orientation. Not properly training your employees can lead to **negligent training (page 246)** liability.

Page 246 discusses **Aligning Strategy and Training**. Read this section to better understand why an employer's strategic plans should dictate its training goals.

Ask yourself: What kinds of training programs have I been a part of? Where the training goals in line with the company's strategic goals? Why or why not?

The Strategic Context on **page 246** discusses how Macy's growth strategy relied on improved customer service so they installed a new training program to meet this goal.

Page 247 discusses **Training and Performance**.

Ask yourself: How important do I feel the training process is to performance and why?

Page 247 discusses **The ADDIE Five-Step Training Process**. Make sure you are familiar with the five steps in this training process: *analysis-design-develop-implement-evaluate* (ADDIE).

Pages 247 to 250 discuss **Conducting the Training Needs Analysis**. Read this section and make sure you understand the difference between **Strategic Training Needs Analysis (page 247)** and **Current Training Needs Analysis (page 248)**.

You should also be familiar with **task analysis** discussed under **Task Analysis: Analyzing New Employees' Training Needs** on **page 248**. Examine **Table 8-1 (page 249)** to see an example *task analysis record form*.

Read about **Talent Management: Using Profiles and Competency Models** on **pages 248 to 249** and make sure you understand why employers use **competency models (page 248)**.

Ask yourself: How could my organization's training program benefit from competency models?

Read about **Performance Analysis: Analyzing Current Employee's Training Needs** on **pages 249 to 250** and make sure you are familiar with the ways employers can identify a current employee's performance.

Read **page 250** to better understand the differences between **Can't Do / Won't Do** problems.

Ask yourself: What are some "can't do" and/or "won't do" problems I have encountered in my career?

Pages 250 to 253 discuss **Designing the Training Program**. The manager designs the overall training program based on the results from the needs analysis. Read this section and make sure you are familiar with the included steps and sub-steps involved in this planning. Including:

- **Setting Learning Objectives (pages 250 to 251)**
- **Creating a Motivational Learning Environment (pages 251 to 252)**
- **Making the Learning Meaningful (page 252)**
- **Making Skills Transfer Obvious and Easy (page 252)**
- **Reinforcing the Learning (page 252)**
- **Ensuring Transfer of Learning to the Job (page 253).**

Other Training Design Issues are discussed on **page 253**.

Page 253 discusses **Developing the Program**. Read this section to better understand actually creating and assembling the training program (aka *program development*).

Ask yourself: How has what I've learned in this section informed how I will approach training at my organization? Which techniques did I find most useful? Which ones do I think will not be helpful?

IMPLEMENTING TRAINING PROGRAMS (Pages 253 to 262)

This section discusses the actually implementing and executing the training.

Pages 253 to 254 discuss **On-the-Job Training**. Read this section to better understand **on-the-job training (OTJ) (page 253)**. The different **Types of On-the-Job Training** are discussed on **page 254**. Make sure you are also familiar with the steps in **The OJT Process (page 254)**. The four steps are:

- Step 1: Prepare the Learner
- Step 2: Present the Operation
- Step 3: Do a Tryout
- Step 4: Follow-Up

Ask yourself: Have I ever participated in on-the-job training? How successful was the training?

Pages 255 to 262 discuss several more types of training. Make sure you read about each of these training types, are familiar with their individual key points and guidelines as well as each of their benefits/usefulness.

- **Apprenticeship Training (page 255)**
 - Examine **Figure 8-2 (page 255)** for a list of popular apprenticeships.
- **Informal Learning (page 255)**
- **Job Instruction Training (pages 255 to 256)**
- **Lectures (page 256)**
- **Programmed Learning (pages 256 to 257)**
- **Audiovisual-Based Training (page 257)**
- **Vestibule Training (page 257)**
- **Electronic Performance Support Systems (EPSS) (pages 257 to 258)**
- **Videoconferencing (page 258)**
- **Computer-Based Training (CBT) (page 258)**
- **Simulated Learning (pages 258 to 259)**
 - Read about the **U.S. Army Example** and the **Other Examples** in this section as well as its **Advantages**.
- **Interactive Learning (page 259)**
- **Internet-Based Training (JIT) (pages 259 to 260)**
 - Make sure you are familiar with the two basic ways, including the use of **Learning Portals (page 260)**
 - Also read **Improving Productivity Through HRIS (page 260)** to better understand Learning Management Systems.
 - The pros and cons of internet learning are discussed under **Using Internet-Based Learning (page 260)**
- **Improving Productivity Through HRIS. Using Internet-Based Learning**
- **Mobile Learning (pages 260 to 261)**
- **The Virtual Classroom (page 261)**
- **Lifelong and Literacy Training Techniques (page 261)**
- **Team Training (page 262)**

Ask yourself: Which of these training types have I participated in? What types am I most curious to try? Which do I think will most benefit my organization and why?

Managing the New Workforce on page 262 discusses diversity training.

Some key terms that you should know from these sections: **apprenticeship training (page 255)**, **job instruction training (JIT) (page 255)**, **programmed learning (page 256)**, **electronic performance support systems (EPSS) (page 257)**, **job aid (page 258)**, **virtual classroom (page 261)**, **lifelong learning (page 261)**, and **cross training (page 262)**.

IMPLEMENTING MANAGEMENT DEVELOPMENT PROGRAMS (Pages 263 to 268)

This section discusses **management development (page 263)**.

Page 263 discusses **Strategy and Development**. Read this section and make sure you are familiar with the three steps in the management development process:

1. Assess strategic needs
2. Appraise current performance
3. Develop managers

Pages 263 to 264 discuss **Managerial On-the-Job Training**. Make sure you read this section and understand the **Coaching/Understudy Approach (page 264)** and **Action Learning (page 264)**. You should also be familiar with **job rotation (page 263)**.

Ask yourself: How can my organization benefit from managerial on-the-job training?

Pages 264 to 266 discuss several **Off-the-Job Management Training and Development Techniques** for managers. Make sure you read this section and are familiar with each of the following techniques (several of which are also key terms):

- **The Case Study Method (Page 264)**
- **Management Games (Page 264)**
- **Outside Seminars (Pages 264 to 265)**
- **University-Related Programs (Page 265)**
- **Role Playing (Page 265)**
- **Behavior Modeling (Page 265)**
 - The basic procedure involves the following four steps (and key terms), all discussed on page 265:
 1. **Modeling**
 2. **Role Playing**
 3. **Social Reinforcement**
 4. **Transfer of Training**
- **Corporate Universities (Page 266)**
 - Many companies establish **in-house development centers (page 266)**.
- **Executive Coaches (Page 266)**
- **The SHRM Learning System (Page 266)**

Ask yourself: Which of these off-the-job techniques would my organization benefit from and why?

Pages 266 to 267 discuss **Leadership Development at GE**. Read the examples in this section to better understand why GE is known for its managerial development.

Pages 267 to 268 discuss **Talent Management and Mission-Critical Employees: Differential Development Assignments**.

MANAGING ORGANIZATIONAL CHANGE PROGRAMS (Pages 263 to 271)

This section discusses ways organizations can better manage change.

Pages 268 to 269 discuss **Want to Change**. The section talks about answers to the question, “What should we change?” Managers can change one or more of the following five aspects: *strategy, culture, structure, technologies, or attitudes and skills*, discussed under **Strategic Change (page 268)** and **Other Changes (pages 268 to 269)**. Make sure you read this section and are familiar with each of these aspects.

Ask yourself: Have I participated in any organizational changes? What positives and negatives did I take away from the process?

Page 269 discusses **Lewin’s Change Process**. Read this section and make sure you are familiar with the following three steps of Lewin’s process:

1. *Unfreezing*
2. *Moving*
3. *Refreezing*

Pages 270 to 271 outline an 8-step process, using Lewin’s method, for **Leading Organizational Change**. The eight steps are as follows:

Unfreezing Stage

1. Establish a sense of urgency.
2. Mobilize commitment.

Moving Stage

3. Create a guiding coalition.
4. Develop and communicate a shared vision.
5. Help employees make the change.
6. Consolidate gains.

Refreezing Stage

7. Reinforce the new ways of doing things.
8. Monitor and assess progress.

Pages 270 to 271 discuss **Using Organizational Development**. Make sure you read this section and understand **Organizational Development (OD) (page 270)** and its distinguishing characteristics. You should also be familiar with the following four categories of OD applications, also illustrated in **Table 8-2 (page 270)**, discussed on **page 271**:

- **Human Process Applications**
- **Technostructural Interventions**
- **Human Resource Management Applications**
- **Strategic OD Applications**

Ask yourself: How could my organization benefit from Organization Development applications?

EVALUATING THE TRAINING EFFORT (Pages 272 to 274)

This section discusses evaluating the effect of training and the two basic issues to address: (1) the design of the study and (2) what should be measured.

Page 272 discusses **Designing the Study**. According to the text, **Controlled experimentation** is the preferred choice. Read this section to learn more about it and examine **Figure 8-3 (page 272)** for another approach using a time series graph.

Page 273 discusses **Training Effects to Measure**. You should be familiar with the four categories of training outcomes:

1. **Reaction**
2. **Learning**
3. **Behavior**
4. **Results**

Examine **Figure 8-4 (page 273)** to see an example training evaluation form.

HR as a Profit Center on **page 274** shows how online tools can also help evaluate training's impact.

Ask yourself: How has my opinion of training programs changed after reading this chapter?

Activities

Chapter Eight Practice Exam:

Click on the link to test your competency. Good Luck!

Week Two Discussion Questions (Chapter Eight):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Of the several types of training discussed on pages 255 to 262, which three do you think would be most effective and why? Include a brief explanation of your three choices in your answer.

[Note: Your instructor will post the question to the Week Two Weekly Discussion Question Forum]

UNIT TWO ASSIGNMENTS

Unit Two Exam

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Two section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Unit Two Case Study

Read the CONTINUING CASE in pages 277 to 278 on “Carter Cleaning Company.”

Write a 3 to 5 page paper (1000 to 1500 words) in APA format in response to the three questions listed in item 3 of the recommended outline below.

1. Cover page (See APA Sample paper)
2. Introduction
 - a. A thesis statement
 - b. Purpose of paper
 - c. Overview of paper
3. Body (Cite sources with in-text citations.)
 - a. Explain specifically what Carter should cover in their new employee orientation program and how they should convey it.
 - b. Argue whether or not Carter Cleaning Center should use a job instruction sheet to identify tasks performed by an employee. If yes, describe what this form should look like for a counter person.
 - c. Describe the specific training techniques Jennifer should use to train her pressers, her cleaners/spotters, her managers, and her counter people. Explain why these training techniques should be used.
4. Conclusion – Summary of main points
 - a. Lessons Learned and Recommendations
5. References – List the references you cited in the text of your paper according to APA format.
(Note: Do not include references that are not cited in the text of your paper)

GRADING

Your instructor will provide a grading rubric to evaluate your paper. Please see the Instructor Syllabus and Policies for details.

Submit your paper to the assignment object.

CHAPTER NINE

Performance Management and Appraisal

KEY LEARNING POINTS

BASIC CONCEPTS IN PERFORMANCE MANAGEMENT AND APPRAISAL (Pages 284 to 290)

Pages 284 to 285 discuss **The Performance Appraisal Process**. Read this section and make sure you understand all the pieces of a **performance appraisal (page 284)** and the 3-step **performance appraisal process (page 285)**. The three steps are:

1. Setting work standards.
2. Assessing employee performance in relation to those standards
3. Giving an employee feedback with the goal of helping to eliminate deficiencies or to continue above par performance

See **Figure 9-1 (page 284)** for a sample faculty evaluation form.

Ask yourself: Why is performance appraisal important to my organization?

Page 285 gives five reasons to answer the question **Why Appraise Performance?** Make sure you read this section and are familiar with these reasons.

Read **HR as a Profit Center** on **page 286** to better understand the importance of setting performance goals.

Page 285 discusses **The Importance of Continuous Feedback**.

Pages 285 to 286 discuss **Performance Management**. Read this section and **Performance Management Defined** to better understand **performance management (page 285)**.

The Strategic Context on **page 287** illustrates the importance of employee contributions to a performance management system.

Pages 287 to 288 discuss setting and **Defining the Employee's Goals and Performance Standards**. Read this section to better understand how organizations can set effective goals, including the SMART mnemonic device: Specific, Measurable, Attainable, Relevant, Timely. **HR in Practice: How to Set Effective Goals (page 288)** gives the following four guidelines:

1. Assign specific goals.
2. Assign measurable goals.
3. Assign challenging but doable goals.
4. Encourage participation.

Make sure you also read **Talent Management: Basing Appraisal Standards on Required Competencies** and **The Role of Job Descriptions**, both on **page 288**.

Ask yourself: What are some of my organization's performance goals?

Page 288 helps answer **Who Should Do the Appraising?** While most appraisals rely on an immediate supervisor, with the HR department serving in an advisory role, there are several additional options to help evaluate performance from a different perspective or without bias. These include:

- Peer Appraisals (Page 288 to 289)
- Rating Committees (Page 289)
- Self-Ratings (Page 289)
- Appraisal by Subordinates (Page 289)
- 360-Degree Feedback (Pages 289 to 290)
 - Examine Figure 9-2 to see an example online 360-Degree feedback survey.

Make sure you read this section and are familiar with each of these techniques.

Ask yourself: How can my organization's appraisal process benefit from these additional techniques? In what instances would I find an immediate supervisor's opinion to be not useful or biased?

TECHNIQUES FOR APPRAISING PERFORMANCE (Pages 290 to 302)

This section discusses the two design questions that must be answered to create the actual appraisal tool: *What dimensions to measure?* And *How to measure them?*

Pages 290 to 293 discuss **Graphic Rating Scale Method**. According to the text, the **graphic rating scale (page 290)** is the simplest and most popular method. Make sure you read this section and examine **Figure 9-3 (page 291)** to see a sample graphic rating scale. **What to Rate?** on **pages 292 and 293** discusses the range of performance measures and traits that could be evaluated. Read this section and examine **Figure 9-4** and **Figure 9-5**, both on **page 292**, for some examples.

Pages 294 and 295 discuss several other methods for appraising performance. Make sure you read this section and are familiar with each of these methods. They include:

- **Alternation Ranking Method (Page 294)** - Illustrated in **Figure 9-6 (page 294)**.
- **Paired Comparison Method (Page 294)** - Illustrated in **Figure 9-7 (page 295)**.
- **Forced Distribution Method (Pages 294 to 295)**
- **Critical Incident Method (Pages 295 to 296)** - Illustrated in **Table 9-1 (page 296)**.
- **Narrative Forms (Page 296)** - Illustrated in **Figure 9-8 (page 297)**.
- **Behaviorally Anchored Rating Scales (BARS) (Pages 296 to 299)** - Illustrated in **Figure 9-9 (page 298)**. Make sure you also read **Research Insight** and are familiar with the five advantages to BARS discussed under **Advantages (page 299)**.
 - The following five steps are typically required in developing a BARS:
 1. Write critical incidents.
 2. Develop performance dimensions.
 3. Reallocate incidents.

4. Scale the incidents.
 5. Develop a final instrument.
- **Mixed Standard Scales (Page 299)**
 - **Management by Objectives (page 300)**
 - **Computerized and Web-Based Performance Appraisal (Pages 300 to 301)** – Illustrated in Figure 9-10 (page 301)
 - **Electronic Performance Monitoring (Page 301)**

Ask yourself: How do I feel about electronic performance monitoring?

Ask yourself: Which of these techniques do I think would be most useful for appraising performance at my organization?

Appraisal in Practice (pages 301 to 302) argues the best form of appraisal merges several methods.

DEALING WITH APPRAISAL PROBLEMS AND INTERVIEWS (Pages 302 to 309)

Pages 303 to 304 discuss several **Potential Appraisal Problems**. These include:

- **Unclear Standards (Page 303)** – Illustrated in **Table 9-2 (page 303)**
- **Halo Effect (Page 303)**
- **Central Tendency (Page 303)**
- **Leniency or Strictness (Pages 303 to 304)**
- **Recency Effects (Page 304)**
- **Bias (Page 304)**

Make sure you read these sections and are familiar with each of these potential problems and their possible solutions.

Ask yourself: Which of these potential appraisal problems did I find unexpected and why?

Pages 304 to 305 discuss five **Guidelines for Effective Appraisals**. Read this section and make sure you are familiar with the following:

1. **Know the Performance Appraisal Problems (Page 304)**
2. **Use the Right Appraisal Tool (Page 304)** – **Table 9-3 (page 305)** summarizes the pros and cons of each tool.
3. **Keep a Diary (Page 304)**
4. **Get Agreement on a Plan (Page 304)**
5. **Ensure Fairness (Page 305)** – See **Figure 9-11 (page 305)** for a checklist of the best practices to ensure fairness.

Ask yourself: How can my organization benefit by using these guidelines when developing their performance appraisals.

Page 306 discusses **Appraisals and the Law**. Read this section and examine **Figure 9-12 (page 306)** for a checklist to ensure a legally defensible appraisal.

Pages 306 to 309 discuss **Managing the Appraisal Interview**. Read this section gives to better

understand how to perform an effective **appraisal interview (page 306)**. The four **Types of Appraisal Interviews** are discussed on **page 306**. Also read **How to Conduct the Appraisal Interview (pages 305 to 306)** and make sure you are familiar with the four things to keep in mind:

1. Talk in terms of objective work data.
2. Don't get personal.
3. Encourage the person to talk.
4. Get agreement.

See **Figure 9-13 (page 307)** for a sample employee development plan and **Figure 9-14 (page 308)** for an appraisal interview checklist.

Tips for **How to Handle a Defensive Subordinate**, **How to Criticize a Subordinate**, **How to Handle a Formal Written Warning**, and on giving **Realistic Appraisals** are found on **pages 308 to 309**.

Ask yourself: Have I ever been in an appraisal interview as the employee? If so, how was it? And what can I take away from the experience that will benefit me in these interviews in the future?

PERFORMANCE MANAGEMENT (Pages 309 to 310)

This section takes a closer look at performance management.

Pages 309 to 310 discuss the differences between **Performance Management vs. Performance Appraisal**. Make sure you read this section and are familiar with the three things that distinguish the two (**page 309**) as well as the six basic elements of performance management (**page 310**). The six elements are: *Direction sharing, goal alignment, ongoing performance monitoring, ongoing feedback, coaching and developmental support, and recognition and rewards*.

Page 310 also discusses the usefulness of **Using Information Technology to Support Performance Management**. Read this section and examine **Figure 9-15 (page 310)** for an example of an online performance management report.

Ask yourself: How can an IT-supported performance management process benefit my organization?

TALENT MANGEMENT PRACTICES AND EMPLOYEE APPRAISAL (Pages 311 to 312)

Read this section and make sure you are familiar with the five practices that distinguish talent management, listed on **page 311**.

Appraising and Actively Managing Employees is discussed on **page 311**. Read this section and **Segmenting and Actively Managing Employees in Practice**, on **pages 311 and 312**, to see it illustrated in several examples. **Figure 9-16 (page 312)** illustrates one way to segment employees, discussed under **How to Segment Employees** on **page 311**.

Activities

Chapter Nine Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Three section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Three Discussion Questions (Chapter Nine):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Several potential appraisal problems are discussed in the text on pages 303 and 304. Briefly discuss each of these potential issues and steps to avoid them.

[Note: Your instructor will post the question to the Week Three Weekly Discussion Question Forum]

CHAPTER TEN

Employee Retention, Engagement, and Careers

KEY LEARNING POINTS

MANAGING EMPLOYEE TURNOVER AND RETENTION (Pages 322 to 326)

Read this section to better understand turnover and how employers can best retain employees.

Page 322 discusses the **Costs of Turnover**. Read **HR as a Profit Center** on **page 322** to better understand the high costs of turnover.

Ask yourself: How has turnover affected my organization?

Pages 322 to 323 discuss **Managing Voluntary Turnover**. Read this section and examine **Figure 10-1 (page 323)** to better understand the reasons why top-performing employees voluntarily leave.

Page 323 also discusses **Retention Strategies for Reducing Voluntary Turnover**

Ask yourself: Have I ever voluntarily left a job? If so, what were my reasons?

Page 324 discusses **A Comprehensive Approach to Retaining Employees**. Read this section and make sure you are familiar with the following steps:

- Selection
- Professional growth
- Provide career direction
- Meaningful work and ownership of goals
- Recognition and rewards
- Culture and environment
- Promote work-life balance
- Acknowledge achievements

The Strategic Context on **page 324** explains how IBM works to give their employees flexible skill sets to keep them with the company longer.

Page 325 discusses **Managing Involuntary Turnover**, which will be discussed further in Chapter 14, and **Talent Management and Employee Retention**.

Ask yourself: How do I see talent management and employee retention interacting at my organization?

Pages 325 to 326 discuss **Job Withdrawal** and give several examples. Read this section, including **Dealing with Job Withdrawal**, for tips on how to combat it.

EMPLOYEE ENGAGEMENT (Page 326)

This section discusses the importance of employee engagement. Read **Why Engagement is Important (page 326)** and make sure you are also familiar with **Actions That Foster Engagement (page 326)** and steps for **Monitoring Employee Engagement (page 326)**. Examine **Figure 10-2 (page 327)** to better understand actions that make employees feel more engaged.

Ask yourself: Have I ever witnessed any difficulties with employee engagement? What did I do to combat them?

CAREER MANAGEMENT (Pages 327 to 333)

This section looks at the benefits—to both employees and employers—of offering career development support.

Pages 327 to 328 discuss **Careers Terminology**. You should be familiar with the following key terms from this section: **career (page 327)**, **career management (page 327)**, **career development (page 327)**, and **career planning (page 328)**.

Page 328 discusses the changing landscape of **Careers Today** and the **Psychological Contract** between employers and employees.

Pages 328 to 329 discuss **The Employee's Role in Career Management** while **page 330** discusses **The Employer's Role in Career Management**. Make sure you read both these sections and are familiar with both roles. You should also be familiar with the term: **reality shock (page 330)**.

Ask yourself: How can my organization benefit by having a more active role in its employee's career management?

Pages 330 to 332 discuss several **Career Management Systems**. These include:

- **Career Centers (Page 330)**
- **Career Planning Workshops (Page 330)**
- **Lifelong Learning Budgets (Page 330)**
- **Provide Career Coaches (Pages 330 to 331)**
- **Offer Online Programs (Page 331)**
- **Career-Oriented Appraisals (Pages 331 to 332)**

Make sure you read this section and are familiar with each of these techniques. **Figure 10-3 (page 331)** illustrates a simple employee career development form and **Figure 10-4 (page 332)** shows a sample performance review development plan worksheet.

Ask yourself: Have I, or has my organization, utilized one of the above career management systems before? Which one(s) would I be most interested in trying?

Pages 332 to 333 discuss the different **Gender Issues in Career Development**. Read this section to better understand the different challenges faced by each gender.

Ask yourself: In terms of career development, what gender disparities have I witnessed? How can my organization work to avoid these?

Page 333 discusses the importance and impact of **The Manager's Role** in their employees' career development.

IMPROVING COACHING SKILLS (Pages 333 to 337)

Read this section to better understand the importance of **coaching (page 333)** and **mentoring (page 333)** as key managerial skills.

Pages 333 to 334 discuss **Building Your Coaching Skills**. Read this section and make sure you are familiar with the interpersonal and analytical skills that are required. According to the text, coaching should be looked at as a four-step process:

1. Preparation
2. Planning
3. Active coaching
4. Follow-Up

Figure 10-5 (page 335) presents a self-evaluation checklist for coaches.

Ask yourself: How has good coaching, or a lack of good coaching, influenced my career and me?

Pages 334 to 335 discuss **Building Your Mentoring Skills**. Make sure you read this section and understand the differences between mentoring and coaching. Some pitfalls to be aware of are discussed in **Mentoring Caveats (Page 334)**, tips are discussed under **The Effective Mentor (Pages 334 to 336)**, and **The Protégé's Responsibilities** are addressed on **page 336**.

Ask yourself: How has a mentor, or lack of a mentor, influenced my career and me?

Read **Improving Productivity through HRIS: Integrating Talent Management and Career and Succession Planning** on **page 336**.

MAKING PROMOTION DECISIONS (Pages 337 to 340)

This section discusses the decisions that must go into promotion planning. Make sure you read this section and are familiar with each of the following decisions.

Decision 1: Is Seniority or Competence the Rule? (Page 337)

Decision 2: How Should we Measure Competence? (Pages 337 to 338)

- a. Read about **The 9-Box Assessment (Pages 337 to 338)** to better understand how the **9-box matrix (page 338)** can help employers assess performance and predict performance potential.

Decision 3: Is the Process Formal or Informal? (Page 338)

Decision 4: Vertical, Horizontal, or Other? (Page 338)

Ask yourself: How will my organization answer these four questions?

Read **pages 338 and 339** to better understand some of the **Practical Considerations (page 338)**, the **Sources of Bias in Promotion Decisions (pages 338 to 339)**, the concerns of **Promotions and the Law (page 339)**, and how to best deal with **transfers (page 339)**, under **Managing Transfers (page 339)**.

Ask yourself: What are some illegal or questionable promotion practices I have seen in my life or represented in the media?

Page 340 discusses **Managing Retirements**. Read this section and make sure you are familiar with both **Workforce Retirement Planning** and the **Methods** discussed.

Activities

Chapter Ten Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Three section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Three Discussion Questions (Chapter Ten):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Compare and contrast mentoring and coaching. Include a brief explanation of the skills required for each in your answer.

[Note: Your instructor will post the question to the Week Three Weekly Discussion Question Forum]

CHAPTER ELEVEN

Establishing Strategic Pay Plans

KEY LEARNING POINTS

BASIC FACTORS IN DETERMINING PAY RATES (Pages 352 to 359)

This section looks at **Employee compensation (page 352)** and its two main components **direct financial payments (page 352)** (wages, salary, bonuses, commissions, etc.), based on increments of time or performance, and **indirect financial payments (page 352)** (benefits, vacations, etc.)

Ask yourself: Looking at one of my recent employments, how was I compensated? Which payments qualified as direct and which ones were indirect?

Page 352 discusses **Aligning Total Rewards with Strategy**. Read this section to better understand why a firm's compensation plan should align with its strategic aims. **Table 11-1 (page 353)** lists some questions to ask to make sure they align.

Read **The Strategic Context** on **page 352** to see how Wegmans Foods excels at strategic compensation management.

Pages 353 to 354 discuss **Equity and Its Impact on Pay Rates**. Read this section to better understand the importance of fair treatment in terms of pay rates. The **Equity Theory of Motivation** on **page 353** tells managers to address four equity forms in regards to compensation: *External equity*, *Internal equity*, *individual equity*, and *procedural equity*. You should be familiar with these and the suggestions under **Addressing Equity Issues** on **pages 353 to 354**.

Ask yourself: Have I ever received more or less compensation than a coworker? Why do I think our salaries differed? Did I consider the pay rates equitable and how did that impact my performance?

Pages 354 to 358 discuss **Legal Considerations in Compensation**. Read this section and make sure you are familiar with the different laws that affect compensation. These include:

- **The 1938 Fair Labor Standards Act (Pages 354 to 355)**
 - **Exempt/Nonexempt** from the FLSA is discussed on **pages 355 to 356** and illustrated in **Figure 11-2** and **Figure 11-3**, both on **page 357**.
- **1936 Equal Pay Act (Page 357)**
- **1974 Employee Retirement Income Security Act (Page 358)**

Managing the New Workforce on **page 355** discusses the difference between an employee and an *independent contractor*. A checklist for classifying individuals as independent contractors is illustrated in **Figure 11-1 (page 356)**.

The laws (key terms) that you should be aware of from this section are: the **David-Bacon Act (1931)** (**page 354**), the **Walsh-Healey Public Contract Act (1936)** (**page 354**), **Title VII of the 1964 Civil Rights**

Act (page 354), the Fair Labor Standards act (1938) (page 354), the Equal Pay Act (1963) (page 357), and the Employee Retirement Income Security Act (ERISA) (page 358).

Ask yourself: Which of these laws was I previously aware of? Did any of this legislation surprise me? Why or why not?

Read about **Other Legislation Affecting Compensation** on **page 358**.

Pages 358 to 359 discuss **Union Influences on Compensation Decisions (Page 358)** and **Pay Policies (pages 358 to 359)**. Make sure you read these sections and understand the impact of **Geography (page 359)**.

HR as a Profit Center on **page 359** illustrates how good pay and benefits can translate into an increased bottom-line.

Ask yourself: How is my organization affected by cost of living differentials?

JOB EVALUATION METHODS (Pages 359 to 364)

This section discusses the **job evaluation (page 360)** approach to pay rates.

Read **page 360** to better understand comparing jobs by their **Compensable Factors**.

Pages 360 to 361 discuss **Preparing for the Job Evaluation**. Read this section and make sure you are familiar with the following steps: *identifying the need, getting cooperation, and choosing an evaluation committee*. You should also know the three main functions of an evaluation committee, including: *identifying benchmarks (page 361), selecting compensable factors, and evaluating the worth of each job*.

Ask yourself: How can my organization benefit from the use of an evaluation committee?

Pages 361 to 362 discuss **Job Evaluation Methods: Ranking**. Read this section and make sure you are familiar with the following five steps in the **ranking method (page 361)**:

1. **Obtain job information**
2. **Select and group jobs**
3. **Select compensable factors**
4. **Rank jobs** – Illustrated in **Table 11-2 (page 362)**
5. **Combine ratings**

Pages 362 to 363 discuss **Job Evaluation Methods: Job Classification**. Read this section to better understand the many ways jobs can be categorized. Some key terms you should also be familiar with from this section: **job classification (or job grading) (page 362), classes (page 362), grades (page 362), and grade definition (page 362)**. Examine **Figure 11-4 (page 363)** for an example of a grade level definition.

Page 363 discusses **Job Evaluation Methods: Point Method**. Read this section to better understand the **point method (page 363)**. You should also be familiar with the use of **“Packaged” Point Plans (Page 363)**.

Pages 363 to 364 discuss **Computerized Job Evaluations**.

Ask yourself: Which job evaluation method would work best for my organization?

HOW TO CREATE A MARKET-COMPETITIVE PAY PLAN (Pages 364 to 374)

This section discusses the 16 steps used to create a market-competitive pay plan. Make sure you read this section and are familiar with each of the following steps:

1. **Choose Benchmark Jobs (Page 364)**
2. **Select Compensable Factors (Pages 364 to 365)**
 - See **Figure 11-5 (page 365)** for a sample factor definition.
3. **Assign Weights to Compensable Factors (Page 365)**
4. **Convert Percentages to Points for Each Factor (Page 365)**
5. **Define Each Factor's Degrees (Page 366)**
 - See **Figure 11-5 (page 365)** for sample definitions for each degree.
6. **Determine for Each Factor Its Factor Degrees' Points (Page 366)**
 - This is illustrated in **Table 11-3 (page 366)**.
7. **Review Job Description and Job Specifications (Page 366)**
8. **Evaluate the Jobs (Page 367)**
 - You should be familiar with **market-competitive pay system**, discussed under **What is a Market-Competitive Pay Plan? (Page 367)**, and **wage curve**, discussed under **What are Wage Curves? (Page 367)**
9. **Draw the Current (Internal) Wage Curve (Pages 367 to 368)**
10. **Conduct a Market Analysis: Salary Surveys (Pages 368 to 370)**
 - Make sure you are familiar with **salary surveys (page 368)** and the use of **Commercial, Professional, and Government Salary Surveys (Page 369)**.
 - You should also know why **Using the Internet To Do Compensation Surveys (Pages 369 to 370)** is useful. Several salary survey websites are illustrated in **Table 11-4 (page 369)**.
11. **Draw the Market (External) Wage Curve (Page 370)**
 - This is illustrated in **Figure 11-8 (page 370)**.
12. **Compare and Adjust Current and Market Wage Rates for Jobs (Page 370)**
 - This is illustrated in **Figure 11-9 (page 371)**.
13. **Develop Pay Grades (Page 371)**
 - Make sure you are familiar with **pay (or wage) grades (page 371)** and **Determining the Number of Pay Grades (Page 371)**.
 - See **Figure 11-10 (page 372)** for a sample wage structure.
 - **Table 11-5** shows the steps and pay rates for some grade levels within the federal government.
14. **Establish Rate Ranges (Pages 371 to 373)**
 - Make sure you are familiar with **pay (or rate) ranges (page 371)**, **compa ratio (page 372)**, and **Developing Rate Ranges (Pages (372 to 373)**.
15. **Address Remaining Jobs (Page 373)**
16. **Correct Out-of-Line Rates (Pages 373 to 374)**

Ask yourself: How can my organization benefit from using this market-competitive pay plan structure?

PRICING MANAGERIAL AND PROFESSIONAL JOBS (Pages 374 to 376)

This section discusses developing compensation plans for managers and professionals and the special factors involved.

Page 374 discusses **Compensating Executives and Managers**. Read this section and make sure you are familiar with the four main elements usually involved. These are: *base pay, short-term incentives, long-term incentives, and executive benefits*.

Pages 374 to 375 discuss **What Determines Executive Pay?** Read this section and make sure you are familiar with the **Elements of Executive Pay (page 374)** and how employers can use **Managerial Job Evaluations (page 374)** to help them with pricing.

Ask yourself: How do I feel executives and managers should be compensated within my organization?

Pages 375 to 376 discuss the unique factors involved with **Compensating Professional Employees**.

CONTEMPORARY TOPICS IN COMPENSATION (Pages 376 to 382)

This section looks at six contemporary compensation topics. Make sure you read this section and are familiar with each of the following topics:

- **Competency-Based Pay (Pages 376 to 378)**
 - **What is Competency-Based Pay?** is answered on **page 376**.
 - **Why use Competency-Based Pay?** is answered on **page 377** along with **Competency-Based Pay in Practice** and the **General Mills Example**.
 - Also read **The Bottom Line on Competency-Based Pay** on **page 378**.
- **Broadbanding (Pages 378 to 379)**
 - Illustrated in **Figure 11-11** on **page 379** along with a discussion of its **Pros and Cons**.
- **Actively Managing Compensation Allocations, and Talent Management (Page 380)**
- **Comparable Worth (Pages 380 to 381)**
 - Make sure you are also familiar with and **The Pay Gap (pages 380 to 381)**.
- **Broad Oversight of Executive Pay (Page 381)**
- **Total Rewards and Tomorrow's Pay Programs (Pages 381 to 382)**

Ask yourself: Which of these contemporary trends in compensation management had I previously noticed? Did I find any of them surprising?

Improving Productivity through HRIS on **page 382** discusses the use of automated strategic compensation administration.

Activities

Chapter Eleven Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Three section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Three Discussion Questions (Chapter Eleven):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Discuss the different laws that affect compensation and their impact on employers. Include a brief explanation of each of the laws in your answer.

[Note: Your instructor will post the question to the Week One Weekly Discussion Question Forum]

UNIT THREE ASSIGNMENTS

Unit Three Exam

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Three section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Unit Three Case Study

Read the APPLICATION CASE in pages 314 to 315 on “Appraising the Secretaries at Sweetwater U.”

Write a 3 to 5 page paper (1000 to 1500 words) in APA format in response to the three questions listed in item 3 of the recommended outline.

1. Cover page (See APA Sample paper)
2. Introduction
 - a. A thesis statement
 - b. Purpose of paper
 - c. Overview of paper
3. Body (Cite sources with in-text citations.)
 - a. Explain whether or not you think the expert’s recommendations will be sufficient and why? Include any additional actions that you think will be necessary.
 - b. Argue whether or not you think graphic rating forms should be replaced with one of the other techniques discussed in this chapter and why?
 - c. Describe the performance appraisal system you would develop for the secretaries and defend your answer.
4. Conclusion – Summary of main points
 - a. Lessons Learned and Recommendations
5. References – List the references you cited in the text of your paper according to APA format.
(Note: Do not include references that are not cited in the text of your paper)

GRADING

Your instructor will provide a grading rubric to evaluate your paper. Please see the Instructor Syllabus and Policies for details.

Submit your paper to the assignment object.

UNIT FOUR

Chapters & Learning Outcomes

The key points of the following chapters (see textbook) will be discussed in this Unit:

- **Chapter Thirteen**
Benefits and Services pages 422 to 457
- **Chapter Fourteen**
Ethics and Employee Rights and Discipline pages 458 to 493
- **Chapter Fifteen**
Labor Relations and Collective Bargaining pages 494 to 529

UNIT FOUR LEARNING OUTCOMES

This Unit meets the following learning outcomes:

- LO 11. Explain the different benefits and benefit plans available to employers and employees.
- LO 12. Argue why ethical behavior is important at work and be able to identify the factors that shape ethical behavior at work.
- LO 13. Employ strategies for effective labor relations and employee separation.
- LO 14. Explain the history of the American labor movement, the impact of labor legislation, and the role of unions.

CHAPTER THIRTEEN

Benefits and Services

KEY LEARNING POINTS

THE BENEFITS PICTURE TODAY (Pages 424 to 425)

This section discusses the importance of **benefits (page 424)** to employees. Examine **Figure 13-1** to see the percentage of employee compensation that goes towards benefits.

Pages 424 to 425 discuss **Policy Issues**. Make sure you read this section and familiar with the policy issues listed. **Table 13-1**, on **page 425**, lists some required and some discretionary benefits.

Read **The Strategic Context** on **page 425** to better understand why a company's benefits plan should align with its overall company strategy.

Ask yourself: What benefits have I received (or not received) at institutions where I worked? How did my benefit plan align with the firm's overall strategy?

PAY FOR TIME NOT WORKED (Pages 425 to 432)

This section discusses the main pay for time not worked benefits, also called **supplemental pay benefits (page 425)**. Make sure you read this section and are familiar with the following benefits:

- **Unemployment Insurance (Pages 425 to 426)**
 - Read this section to better understand **unemployment insurance (or compensation)** laws.
 - Examine the checklist in **Table 13-2** to see how employers can protect themselves from high unemployment costs.

Ask yourself: Have I ever received unemployment benefits? Have I ever been denied them? How can my organization work to keep unemployment costs down?

- **Vacations and Holidays (Page 427)**
 - Read this section to better understand formulating holiday and vacation policy.
 - Some potential issues are discussed under **Some Legal Aspects of Vacations and Holidays (page 427)**
- **Sick Leave (Pages 427 to 428)**
 - Some **Cost-Reduction Tactics** for employers are discussed on **page 428**.
 - Also read **Evidence-Based HR: Tracking Sick Leave** on **page 428**.
 - **HR as a Profit Center (page 428)** illustrates some ways organizations can work to cut absences.

Ask yourself: Have I ever used a sick day when I was not actually sick? How would my organization benefit from the cost-reduction tactics discussed on page 428?

- **Parental Leave and the Family and Medical Leave Act (Pages 429 to 431)**
 - Read this section, and see **Figure 13-2 (page 429)**, to better understand the FMLA.
 - Some **FMLA Guidelines** are discussed on **pages 430 to 431**.
 - **Figure 13-3 (page 430)** shows a sample online leave request form.
- **Severance Pay (Pages 431 to 432)**
 - Make sure understand **severance pay (page 431)** and read the **Guidelines** on **pages 431 to 432**.
- **Supplemental Unemployment Benefits (Page 432)**

Ask yourself: How is my organization impacted by the FMLA?

INSURANCE BENEFITS (Pages 432 to 438)

This section discusses the required or voluntary insurance benefits provided by employers. Make sure you read this section and are familiar with the following insurance benefits:

- **Workers' Compensation (Pages 432 to 433)**
 - Read this section to better understand **workers' compensation (Page 432)** laws.
 - **How Benefits are Determined** is discussed on **page 432**.
 - Some tips for **Controlling Workers' Compensation Costs** are discussed on **pages 432 to 433**.

Ask yourself: How can my organization work to keep workers' compensation costs down?

- **Hospitalization, Health, and Disability Insurance (Pages 433 to 434)**
 - The prevalence of health-related benefits is illustrated in **Table 13-3 (page 433)**.
 - Read more about **Coverage** on **pages 433 to 434**.
 - You should also be familiar with **health maintenance organizations (HMOS) (page 434)** and **preferred provider organizations (PPOs) (page 434)**.
 - **Mental Health Benefits** are discussed on **page 434**.
- Read about **The Legal Side of Health Benefits** on **pages 434 to 435**.
 - **Protection and Affordable Care Act of 2010 (pages 434 to 435)**
 - **Cobra (page 435)** – See **Figure 13-4 (page 436)** for a checklist.
 - **Other Laws (page 435)**

Ask yourself: How will the Protection and Affordable Care Act of 2010 affect my organization?

- Several **Trends in Employer Health Care Cost Control** are discussed on **pages 435 to 437**. These include:
 - **Communication and Empowerment (pages 436 to 437)**
 - **Wellness Programs (page 437)**
 - **Claim Audits (page 437)**
 - **Limited Plans (page 437)**
 - **Outsourcing (page 437)**
 - **Other Cost-Control Options (page 437)**

- **Long-Term Care**

Ask yourself: How could my organization benefit from a Wellness Program?

- **Long-Term Care (Pages 437 to 438)**
- **Life Insurance (Page 438)**
 - You should be familiar with **group life insurance**.
- **Benefits for Part-Time and Contingent Workers (Page 438)**

Ask yourself: Have I ever received life insurance benefits from an employer?

RETIREMENT BENEFITS (Pages 438 to 442)

This section discusses retirement benefits and some of the challenges that they present.

Page 438 discusses **Social Security**. Read this section and make sure you are familiar with the three benefits of **Social Security**: *retirement benefits, survivor's or death benefits, and disability payments*.

Pages 438 to 439 discuss **Pension Plans**. Read this section to better understand **pension plans (page 438)** and their three basic classifications: *contributory vs. noncontributory plans, qualified vs. nonqualified plans*, and **defined contribution plans (page 439) vs. defined benefit plans (page 439)**. Make sure you also understand the importance of **portability (page 439)**.

You should also read about **401(k) Plans**, on **pages 439 to 440**, and **Other Defined Contribution Plans**, on **page 440**. These other plans include: **savings and thrift plans, deferred profit-sharing plans, and employee stock ownership plans (ESOP)**. Also read about **Cash Balance Pension Plans** on **page 440**.

Ask yourself: How will my organization handle pension plans?

Pages 441 to 442 discuss **Pension Planning and the Law**. The main law is the **Employee Retirement Income Security Act of 1975 (ERISA)**. Make sure you are familiar with this law, the **Pension Benefits Guarantee Corporation (PBGC) (page 441)**, **Membership Requirements (page 441)**, and **Vesting (page 441 to 442)**

Page 442 discusses **Pensions and Early Retirement**. Make sure you read this section and understand the use of an **early retirement window (page 442)**.

Read **Improving Productivity through HRIS (page 442)** to better understand the use of online benefits management systems.

Ask yourself: How does the ERISA affect my organization?

PERSONAL SERVICES AND FAMILY-FRIENDLY BENEFITS (Pages 443 to 445)

This section discusses the additional services benefits offered by many employees.

Page 443 discusses **Personal Services** including **Employee Assistance Programs (EAPs) (page 443)**. Make sure you read this section and are familiar with the type of personal services often offered.

Ask yourself: What types of personal services will my organization offer?

Pages 443 to 445 discuss **Family-Friendly (Work-Life) Benefits**. These include: **Subsidized Child Care (page 444)**, **Sick Child Benefits (page 444)**, and **Elder Care (page 444)**. Make sure you read this section and are familiar with these benefits as well as **Family-Friendly Benefits and the Bottom Line (page 445)**.

Page 445 discusses **Other Job-Related Benefits** you should be familiar with, including **Educational Subsidies (page 445)** and **Domestic Partner Benefits (page 445)**.

Page 445 discusses **Executive Perquisites**

FLEXIBLE BENEFITS PROGRAMS (Pages 446 to 449)

This section explains the main types of flexible benefit programs. See **Figure 13-5 (pages 446 to 447)** for an example survey an employer could use to gather data on employee preferences.

Pages 446 to 447 discuss **The Cafeteria Approach**. This can be called either **flexible benefits plan** or a **cafeteria benefits plan**. Make sure you read this section and are familiar with the different **Types of Plans**, discussed on **pages 446 to 447**. These include: *flexible spending accounts, debit cards, and core plus option plans*.

Pages 447 to 448 discuss **Benefits and Employee Learning**. Make sure you read this section and understand the attraction of employee leasing firms, particularly to smaller businesses.

Ask yourself: Would my organization benefit from using an employee leasing firm?

Pages 448 to 449 discuss **Flexible Work Schedules**. These include:

- **Flextime (Page 448)**
- **Compressed Workweeks (Page 448)**
- **Effectiveness of Flexible Work Schedule Arrangements (Page 448)**
- **Workplace Flexibility (Page 448)**
- **Other Flexible Work Arrangements (Pages 448 to 449)**
 - Including **job sharing (page 448)** and **work sharing (page 449)**.

Make sure you read this section and are familiar with each of the above work schedules.

Ask yourself: How can my organization benefit from using flexible work schedules?

Activities

Chapter Thirteen Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Four section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Four Discussion Questions (Chapter Thirteen):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Discuss the ways in which an HR department can help keep pay for time not worked costs down. Include a brief explanation of each of the different types of supplemental pay benefits in your answer.

[Note: Your instructor will post the question to the Week Four Weekly Discussion Question Forum]

CHAPTER FOURTEEN

Ethics and Employee Rights and Discipline

KEY LEARNING POINTS

ETHICS AND FAIR TREATMENT AT WORK (Pages 460 to 463)

Read **The Strategic Context** on **page 460** to better understand the importance of ethics at work.

Ask yourself: Take the quiz workplace ethics quiz in **Figure 14-1 (page 460)**. How ethical were my answers?

This section discusses the importance of ethics and fair treatment in the workplace and their relation to human resource management.

Page 461 answers the question **What is Ethics?** Read this section and the following **Ethics and the Law**.

Pages 461 to 462 discuss **Ethics, Justice, and Fair Treatment**. Make sure you are familiar with **distributive justice** and **procedural justice**. Examine **Figure 14-2 (page 462)** to better understand fair treatment.

Pages 462 to 463 discuss **Ethics, Public Policy, and Employee Rights**. Read this section and make sure you are familiar with **Unalienable Rights, Public Policy, and Employment Rights**.

Ask yourself: What rights do I view as unalienable rights?

WHAT SHAPES ETHICAL BEHAVIOR AT WORK? (Pages 463 to 466)

Pages 463 to 464 discuss that **There's No One Smoking Gun** that determines ethical behavior. Rather it is several factors combined. The following three questions summarize a recent ethics research finding:

1. *"Individual characters: Who are the bad apples?"*
2. *"Which ethical situations make for bad (ethically dangerous) cases or situations?"*
3. *"What are the 'bad barrels'? What outside factors mold ethical choices?"*

Read this section and make sure you understand "bad apples," "bad cases," and "bad barrels."

Page 464 discusses **The Person (What Makes Bad Apples?)**. Read this section and the list of specific **Traits**.

Ask yourself: Have I ever worked with any "bad apples"?

Pages 464 to 465 discuss **Outside Forces That Shape Ethical Decisions (Bad Barrels)**. Make sure you read this section and are familiar with the following possible contributors:

- **Company Pressures (Page 464)**
- **Pressure from the Boss (Page 465)**
- **Ethics Policies and Codes (Page 465)**
- **The Organization's Culture (Pages 465 to 466)**
 - Good ways for managers to send the right signals to their employees is by: *clarifying expectations, using signs and symbols, and providing physical support.*

Read **In Summary: Some Thing to Keep in Mind About Ethical Behavior at Work** on **page 466** and take note of the list of suggestions for managers.

Ask yourself: How can my organization and I benefit from incorporating these suggestions into our management mentality?

USING HUMAN RESOURCE MANAGEMENT METHODS TO PROMOTE ETHICS AND FAIR TREATMENT (Pages 467 to 468)

This section discusses ways in which HR management can promote ethical behavior in the workplace. Read this section and make sure you are familiar with each of the following examples:

- **Selection**, on **page 467**, discusses hiring ethical individuals and why this should be done through a fair interview process. **Figure 14-3 (page 467)** illustrates emphasizing ethics in the recruitment process.
- **Page 468** discusses the importance of **Ethics Training**.
- **Performance Appraisal**, on **page 468**, emphasizes conducting fair performance appraisals.
- **Page 468** also discusses the importance of **Reward and Disciplinary Systems** for ethical and unethical behavior.
- **Managing Ethics Compliance** is discussed on **page 468**.

Ask yourself: How will I utilize these methods within my HR management?

MANAGING EMPLOYEE DISCIPLINE AND PRIVACY (Pages 468 to 475)

This section discusses how to employ fair disciplinary practices and why they are important.

Page 469 discusses the importance of **Fairness in Disciplining** and the three reasons to treat employees fairly: *arbitrators and the courts, positive employee outcomes, and job applicants.*

Pages 469 to 470 also discuss the importance of preventing **Bullying and Victimization** in the workplace. According to the text, bullying involves: *an imbalance of power, an intent to cause harm, and repetition.* Bullying can take form as: *verbal, social, physical, or cyberbullying.* Read this section and the **Research Insight** on **Page 470**.

Ask yourself: Have I been a victim of bullying? What form did it take and how was it handled?

Pages 470 to 471 address **What Causes Unfair Behavior**. Read this section and make sure you are familiar with the three actions that influence perceived fairness: *involving employees, understanding*

why, and knowing the *standards*.

Ask yourself: How can my organization work to promote fair behavior?

Pages 471 to 470 discuss the **Basics of a Fair and Just Disciplinary Process**. Read this section and make sure you are familiar with each of the following three tenants of a fair and just disciplinary process:

- **Rules and Regulations (Page 471)**
- **Progressive Penalties (Page 471)**
 - See **Figure 14-4 (page 472)** for an example disciplinary action form.
- **Formal Disciplinary Appeals Processes (Page 471)**
 - A sample grievance form is shown in **figure 14-5 (page 473)**

Discipline Without Punishment, on **pages 471 to 473**, discusses alternatives to discipline, or **nonpunitive discipline (page 472)**. Make sure you read this section and the four steps supervisors should take, listed on **page 472**, to use it. **In Summary: The Hot Stove Rule (Page 473 to 474)** lists the 4-point “hot stove rule”, make sure you are familiar with this rule. Examine **Figure 14-6 (page 474)** for a list of useful fair discipline guidelines.

Ask yourself: How will my organization handle discipline? How do I feel about nonpunitive discipline?

Page 474 discusses **Employee Privacy**. Make sure you read this section and that you are familiar with the four main types of employee privacy violations.

Pages 474 to 475 discuss **Employee Monitoring**. Read this section and make sure you are familiar with the two main **Restrictions**, discussed on **page 475**: the **Electronic Communications Privacy Act (ECPA)** and *common-law protections against the invasion of privacy*.

Ask yourself: How do I feel about employee monitoring? Will my organization utilize any of the methods discussed in the text?

MANAGING DISMISSALS (Pages 476 to 485)

This section discusses **dismissals (page 476)** and important factors to help effectively managing them.

Pages 476 to 477 discuss **Termination at Will and Wrongful Discharge**. Make sure you read these sections and are familiar with both terms.

Pages 477 to 478 discuss **Grounds for Dismissal**. Read this section and be aware of the following four bases for dismissal: *unsatisfactory performance*, *misconduct*, *lack of qualifications*, and *changed requirements of the job*. You should also be familiar with a form of misconduct known as **Insubordination (pages 477 to 478)** and acts that are insubordinate. Examine **Figure 14-8 (page 477)** to better understand *gross misconduct*.

Ask yourself: Have I ever witnessed or dealt with any acts of insubordination? How will I handle insubordination inside my organization?

Read **Fairness in Dismissals** on **page 478** and make sure you are familiar with the three things managers can do to make them fair: *give full explanations, go through a multistep process, and be aware of who actually does the dismissing.*

You should also be aware of the **Security Measures** discussed on **page 478**.

Ask yourself: How will I handle dismissals at my organization?

Pages 478 to 480 discuss **Avoiding Wrongful Discharge Suits**. Make sure you read this section and are aware of the three-pronged approach discussed in the text. Examine **Figure 14-9 (page 479)** to better understand typical severance policies. See **figure 14-10 (page 480)** for an example handbook acknowledgement form.

HR as a Profit Center, on **pages 479 to 480**, explains the vital role of human resource managers in helping minimize wrongful termination suits.

Ask yourself: How will I work to minimize wrongful discharge suits against my company?

Pages 480 to 481 discuss **Personal Supervisory Liability**. Make sure you read this section and familiar with the ways managers can avoid personal liability suits.

Pages 481 to 483 discuss **The Termination Interview**. Read this section and the guidelines for the **termination interview (page 481)** listed in the text and below.

1. Plan the interview carefully.
2. Get to the point.
3. Describe the situation.
4. Listen.
5. Review all elements of the severance package.
6. Identify the next step.

You should also be familiar with **Outplacement Counseling**, discussed on **pages 481 to 482**, and the role of an **Exit Interview (Pages 482 to 483)**. See **Figure 14-11 (page 482)** for a sample exit interview questionnaire.

Ask yourself: Do I think exit interview are important? Why or why not?

Pages 483 to 485 discuss **Layoffs, Downsizing, and the Plant Closing Law**. Read this section and make sure you are familiar with **The Plant Closing Law (Page 483)** and the sensible layoff steps, discussed in **The Layoff Process** on **pages 483 to 484**, and listed below.

- Identify objectives and constraints.
- Form a downsizing team.
- Address legal issues.
- Plan post-implementation actions.
- Address security concerns.
- Try to remain informative.

Also read **Preparing for Layoffs (Page 484)**, **Dismissal's Effects (Page 484)**, **Bumping/Layoff Procedures (Pages 484 to 485)**, and **Layoff and Downsizing Alternatives (Page 485)**.

Page 485 discusses **Adjusting to Downsizing and Mergers**. Read this section and make sure you are familiar with the **Merger Guidelines** listed on **page 485**.

Activities

Chapter Fourteen Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Four section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Four Discussion Questions (Chapter Fourteen):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Describe the influences that can create "bad apples," "bad cases," and "bad barrels" and how the combination of the three can impact the ethical environment in a workplace. Include brief explanations of the three in your answer.

[Note: Your instructor will post the question to the Week Four Weekly Discussion Question Forum]

CHAPTER FIFTEEN

Labor Relations and Collective Bargaining

KEY LEARNING POINTS

THE LABOR MOVEMENT (Pages 496 to 498)

This section discusses the number of workers that belong to unions and the potential positives that can come from good union-management relations. This is illustrated in **The Strategic Context** on page 496.

Pages 496 to 497 discuss **Why Do Workers Organize?** Read this section to better understand the factors that lead to workers unionizing.

Ask yourself: What labor unions am I familiar with?

Pages 497 to 498 discuss **What do Unions Want?** According to the text, this can be generalized into two goals: (1) **Union Security**, discussed on **pages 497 to 498**, and (2) **Improved Wages, Hours, and Benefits**, discussed on **page 498**.

There are five types of union security:

1. Closed shop
2. Union shop
3. Agency shop
4. Preferential shop
5. Maintenance of Membership arrangement

You should also be familiar with **right to work (page 498)**.

Page 498 discusses **The AFL-CIO and the SEIU**, make sure you are familiar with both organizations.

Ask yourself: What are my feelings on unions? Do I see them as a positive or negative to employee relations?

UNIONS AND THE LAW (Pages 498 to 502)

This section discusses the three distinct time periods for unions and the law

Pages 499 to 500 discuss **Period of Strong Encouragement: The Norris-LaGuardia and National Labor Relations (or Wagner) Acts (1935)**. Make sure you are familiar with the **Norris-LaGuardia Act of 1932**, the **National Labor Relations (or Wagner) Act**, and the **National Labor relations Board (NLRB)** created by the Wagner Act. You should also know the five unfair labor practices, listed under **Unfair Employer Labor Practices** on **page 499**, which the Warner Act declared as “statutory wrongs.” And example NLRB Form 501, for filing an unfair labor practice, is shown on **page 500** in **Figure 15-1**.

Page 501 discusses **Period of Modified Encouragement Coupled with Regulation: The Taft-Hartley Act**

(1947). Read this section to better understand the **Taft-Hartley Act of 1947**. You should be familiar with the four ways it limited unions, listed on **page 501**.

Pages 501 to 502 discuss **Unfair Union Labor Practices**. Read this section and make sure you know the labor practices unions were prohibited from engaging in by the Taft-Harley Act: *Restraining or coercing employees, cause an employer to discriminate, refuse to bargain in good faith, and featherbedding*.

Also read about the **Rights of Employees (Page 501)** and the **Rights of Employers (Page 502)** that were protected by the Taft-Hartley Act. The act also allows intervention by the U.S. president in **National Emergency Strikes (Page 502)**.

Page 502 also discusses the **Period of Detailed Regulation of Internal Union Affairs: The Landrum-Griffin Act (1959)**. Read this section to better understand the **Landrum-Griffin Act (page 502)**.

Ask yourself: Which of these laws were I previously familiar with? Which ones surprised me?

THE UNION DRIVE AND ELECTION (Pages 502 to 509)

This section discusses the five basic steps of a union drive and election. Make sure you read this section and understand each of the following steps:

- 1. Initial Contact (Pages 502 to 503)**
 - You should also be familiar with **Labor Relations Consultants** and **Union Salting**, both discussed on **page 503**.
- 2. Obtaining Authorization Cards (Page 504)**
 - An example **authorization card** is illustrated in **Figure 15-2 (page 504)**.
- 3. Holding a Hearing (Page 505)**
 - Make sure you're familiar with the role of **bargaining units (page 505)**.
 - See **Figure 15-3 (page 506)** for an example NLRB Form 852: Notice of Representation Hearing.
- 4. The Campaign (Page 505)**
 - See **Figure 15-4 (page 507)** for an example NLRB ballot.
- 5. The Election (Page 505)**

Ask yourself: Which of these steps in a union drive and election was I previously familiar with? Which ones surprised me?

Pages 507 to 508 discuss **How to Lose an NLRB Election**. Read this section and make sure you are familiar with the following four reasons why companies lose elections:

- Reason 1. Asleep at the Switch**
- Reason 2. Appointing a Committee**
- Reason 3. Concentrating on Money and Benefits**
- Reason 4. Delegating Too Much to Divisions**

Ask yourself: How will my organization handle an NLRB election?

Page 508 discusses **Evidence-Based HR: What to Expect the Union to Do to Win the Election**

Page 508 also discusses **The Supervisor’s Role**. Read this section and the tips for supervisors.

Rules Regarding Literature and Solicitation, on **page 509**, discusses the steps employers can legally take to restrict union organizing.

Page 509 discusses **Decertification Elections: Ousting the Union**. Make sure you understand the process of **decertification (page 509)**.

THE COLLECTIVE BARGAINING PROCESS (Pages 509 to 516)

This section discusses the process of **collective bargaining (page 509)**.

Pages 509 to 510 addresses **What is Collective Bargaining?** And **What is Good Faith?** Read these sections and make sure you are familiar with the examples of bargaining that is not in good faith on **page 510**.

Pages 510 to 511 discuss **The Negotiating Team**. Both management and unions have negotiating teams they send to the bargaining table. Read this section and **HR as a Profit Center** on **page 511** to better understand these teams and their negotiations.

Page 511 discusses **Bargaining Items**. You should be familiar with the following categories of specific items subject to bargaining: **voluntary (or permissible) bargaining items**, **illegal bargaining items**, and **mandatory bargaining items**. See **Table 15-1 (page 512)** for a list of some bargaining items.

Read **pages 511 to 512** for some **Bargaining Hints**.

Ask yourself: Did any of the bargaining items, or their categories, in Table 15-1 surprise me? Which ones was I already familiar with?

Pages 512 to 516 discuss **Impasses, Mediation, and Strikes**. Read this section and make sure you understand the three types of **Third-Party Involvement** to deal with **impasses (page 512)**, discussed on **pages 512 to 513**. These are: **mediation (page 512)**, **fact finder (page 513)**, and **arbitration (page 513)**. You should also know the two main arbitration topics: **interest arbitration** and **rights arbitration**, both defined on **page 513**.

Sources of Third-Party Assistance are discussed on **page 513**.

Ask yourself: How will my organization handle impasses?

Several types of **Strikes (page 513)** are discussed on **pages 513 to 515**. These include: **economic strike**, **unfair labor practice strikes**, **wildcat strike**, and **sympathy strikes**. You should be familiar with them and **picketing (page 514)**.

Also read **Strike Guidelines for Employers (page 515)** and **Other “Weapons” (page 516)**. Several other “weapons” you should be familiar with are: **corporate campaign**, **boycott**, and **inside games**, all discussed on **page 516**.

Ask yourself: How will my organization handle strikes?

Improving Productivity through HRIS on **page 516** discusses the usefulness of email and the internet to

unions. Some other key terms you should know from this section are **lockout** and **injunction**, both defined on **page 516**.

Page 516 discusses **The Contract Agreement**.

DEALING WITH DISPUTES AND GRIEVANCES (Pages 517 to 519)

This section discusses the **grievance procedure (page 517)**.

Page 517 discusses **Sources of Grievances**. Read this section and make sure you are familiar with the examples given in the text.

Pages 518 to 519 discuss **The Grievances Procedure**. **Figure 15-6 (page 518)** shows an example grievance form.

Read the **Guidelines for Handling Grievances** on **page 519** and make sure you are familiar with the dos and don'ts.

Ask yourself: How will my organization handle grievances?

THE UNION MOVEMENT TODAY AND TOMORROW (Pages 520 to 522)

Read **page 520** to better understand **Why Union Membership is Down**.

Page 520 asks if recent times have been **An Upswing for Unions?** Read this section and **Card Check and Other New Union Tactics** on **page 521** to better understand the current union climate.

Pages 521 to 522 discuss **High-Performance Work Systems, Employee Participation, and Unions**.

Ask yourself: What recent news have I heard about union activity in the U.S. or across the globe?

Activities

Chapter Fifteen Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Four section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Four Discussion Questions (Chapter Fifteen):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Describe the pros and cons of labor unions from an HR perspective. Do you feel they have a positive or negative impact on employee / employer relations? Use evidence from the text to support your answer.

[Note: Your instructor will post the question to the Week Four Weekly Discussion Question Forum]

UNIT FOUR ASSIGNMENTS

Unit Four Exam

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Four section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Unit Four Case Study

Read the APPLICATION CASE in page 525 on “Negotiating with the Writers Guild of America.”

Write a 3 to 5 page paper (1000 to 1500 words) in APA format in response to the four questions listed in item 3 of the recommended outline below.

1. Cover page (See APA Sample paper)
2. Introduction
 - a. A thesis statement
 - b. Purpose of paper
 - c. Overview of paper
3. Body – (Cite sources with in-text citations.)
 - a. Explain what it means to argue in good faith and whether or not you agree with the producers that the WGA was not.
 - b. Describe the tactics the producers and the WGA could have each used when the WGA went on strike.
 - c. Comment on whether or not you think the conflict between the WGA and the producers differs from a conflict between autoworkers and auto companies.
 - d. Describe the role (with examples) negotiating skills seemed to play a role in the WGA’s and producers’ negotiations.
4. Conclusion – Summary of main points
 - a. Lessons Learned and Recommendations
5. References – List the references you cited in the text of your paper according to APA format.

(Note: Do not include references that are not cited in the text of your paper)

GRADING

Your instructor will provide a grading rubric to evaluate your paper. Please see the Instructor Syllabus and Policies for details.

Submit your paper to the assignment object.

UNIT FIVE

Chapters & Learning Outcomes

The key points of the following chapters (see textbook) will be discussed in this Unit:

- **Chapter Sixteen**
Employee Safety and Health pages 530 to 575
- **Chapter Seventeen**
Managing Global Human Resources pages 576 to 603
- **Chapter Eighteen**
Managing Human Resources in Small and Entrepreneurial Firms pages 604 to 632

UNIT FIVE LEARNING OUTCOMES

This Unit meets the following learning outcomes:

- LO 15. Employ strategies for occupational health and workplace safety.
- LO 16. Identify the human resource challenges of international business.
- LO 17. Employ strategies for both global and small business human resource management.

CHAPTER SIXTEEN

Employee Safety and Health

KEY LEARNING POINTS

SAFETY AND THE MANAGER (Pages 532 to 533)

This section discusses **Why Safety is Important (page 532)**, **Management's Role in Safety (page 533)**, **What Top Management Can Do (pages 532 to 533)**, and **The Supervisor's Role in Safety (page 533)**. Make sure you read these topics and **The Strategic Context**, on **pages 523 to 533**, to better understand the importance of safety and accident prevention.

Ask yourself: What will my role be in safety and accident prevention at my organization?

OCCUPATIONAL SAFETY LAW (Pages 533 to 539)

This section discusses the **Occupational Safety and Health Act of 1970 (page 533)**, which created the **Occupational Safety and Health Administration (OSHA)**.

Pages 533 to 534 discuss **OSHA Standards and Record Keeping**. Read this section and see **Figure 16-2 (Page 534)** to better understand how detailed and complete the OSHA standards are. Employers, with 11 or more employees, must also keep records of any **occupational illnesses (page 534)** or injuries. **What the Employer Must Report** is discussed on **pages 534 and 535** and illustrated in **Figure 16-2 (page 534)**. **Figure 16-3 (page 536)** shows an injury and illness report form.

Ask yourself: What did I previously know about OSHA? Was I already aware of the standards and record keeping discussed in the text?

Pages 535 to 537 discuss **Inspections and Citations**. Read this section and make sure you are familiar with the **Inspection Priorities (page 535)**, **The Inspection (page 535)**, and **the Penalties (page 537)**. You should also understand the use of **citations (page 535)**. Some **Managers' Inspection Guidelines** are listed on **page 537**, make sure you read these and about **OSHA'S Free On-Site Inspections (page 537)**.

Ask yourself: Have I ever seen or been part of an OSHA inspection? Do I know any businesses that received an OSHA citation? If so, what was it for and how did they handle it?

Pages 538 to 539 discuss the **Responsibilities and Rights of Employers and Employees**. Read this section to better understand both groups' rights and responsibilities. An example OSHA safety poster is shown in **Figure 16-4 (page 538)**. **Dealing with Employee Resistance** is discussed on **page 538**.

WHAT CAUSES ACCIDENTS? (Pages 539 to 540)

This section discusses the three basic causes of workplace accidents. These include: *chance occurrences*, **unsafe conditions (page 539)**, and *employee's unsafe acts*. Make sure you are familiar with each. Unsafe conditions are discussed under **What Causes Unsafe Conditions and Other Work-Related Safety Problems?** on **pages 539 and 540**. Read this section and make sure you are familiar with them as well as

the possible **Danger Zones (pages 539 to 540)**. Unsafe acts are discussed under **What Causes Unsafe Acts? (A Second Basic Cause of Accidents)**.

HOW TO PREVENT ACCIDENTS (Pages 540 to 551)

This section discusses the two ways employers can help prevent accidents: (1) **Reducing Unsafe Conditions (Pages 540 to 545)** and (2) **Reducing Unsafe Acts (Pages 546 to 550)**.

Read **pages 540 to 545** to better understand the ways employers can *reduce unsafe conditions*. Examine the checklists in **Figure 16-5 (page 541)**, **Figure 16-6 (pages 542 to 543)**, and **Figure 16-8 (pages 566 to 569)** to see the types of potential hazards employers can identify and remove.

Ask yourself: Which, if any, of these hazards surprised me as potential hazards? Were there any potential hazards I thought were missing?

One way employers can identify and eliminate hazards is by conducting a **Job Hazard Analysis**, discussed on **pages 543 and 544**. Make sure you read this section and are familiar with the types of questions that should be asked. These include: *What can go wrong? What are the consequences? How could it happen? What are other contributing factors?*

You should also be familiar with **Operational Safety Reviews (page 545)** and **Personal Protective Equipment (page 545)**.

Ask yourself: How can performing job hazard analyses help prevent accidents at my organization?

Managing the New Workforce on **page 545** discusses the importance of protecting vulnerable workers.

Read **pages 546 to 550** to better understand how employers can *reduce unsafe acts* through the following ways:

- **Reducing Unsafe Acts through Selection and Placement (Page 546)**
- **Reducing Unsafe Acts through Training (Pages 546 to 547)**
 - Make sure you also understand the importance of **Creating a Supportive Environment (Page 547)**.
- **Reducing Unsafe Acts through Motivation: Posters, Incentives, and Positives Reinforcement (Pages 547 to 548)**
 - The **Research Insight: Positive Reinforcement** on **page 548** discusses the research behind *positive reinforcement programs*.
- **Reducing Unsafe Acts through Behavior-Based Safety (Page 548)**
 - Make sure you are familiar with the meaning of **behavior-based safety (page 548)**.
- **Reducing Unsafe Acts through Employee Participation (Pages 548 to 549)**
 - A employee safety responsibilities checklist is illustrated in **Figure 16-7 (page 549)**.
- **Reducing Unsafe Acts by Conducting Safety and Health Audits and Inspections (Pages 549 to 550)**
 - You should also be familiar with **Safety Awareness Programs (pages 549 to 550)**.

Managing the New Workforce on **page 547** discusses safety training for Hispanic workers.

Table 16-1 (page 550) summarizes the suggestions for reducing unsafe conditions and acts.

Ask yourself: How can my organization and I utilize these suggestions to help reduce unsafe acts and conditions?

Pages 550 to 551 discuss **Controlling Workers' Compensation Costs**. Read this section and make sure you understand what employers can do **Before the Accident (Page 550)** and **After the Accident (Page 551)**.

HR as a Profit Center on **page 551** discusses how claim-tracking software can help reduce workers' compensation claims.

Ask yourself: How can I help my organization control workers' compensation costs?

WORKPLACE HEALTH HAZARDS: PROBLEMS AND REMEDIES (Pages 551 to 561)

This section discusses some common workplace health hazards.

Page 552 discusses **Basic Industrial Hygiene Program**. **Table 16-2 (Page 552)** lists some of OSHA's substance-specific health standards. Read this section to make sure you are familiar with how employers should manage their *industrial hygiene*. You should also understand why managing exposure to these hazards should involve: *recognition, evaluation, and control*.

Also read **page 552** to better understand the dangers of **Asbestos Exposure at Work**.

Page 553 discusses **Infectious Diseases**. Read this section and make sure you are familiar with the steps employees can take to prevent them.

Page 553 also discusses the importance for monitoring **Air Quality**.

Ask yourself: What are some of the ways my organization can work to combat sickness in the workplace?

Pages 553 to 555 discuss the prevalence **Alcoholism and Substance Abuse** in the workforce. Read about the **Effects of Alcohol Abuse** on **page 553** and what employers can do to combat it, under **Supervisor Training (pages 553 to 554)**, **Dealing with Substance Abuse (page 554)**, and **Substance Abuse Policies (page 555)**. Possible signs of an alcohol-related problem are listed in **Table 16-3 (page 554)**.

Pages 555 to 557 discuss **Stress, Burnout, and Depression**. Read this section and make sure you are familiar with some of the ways employers can help in **Reducing Job Stress (Pages 555 to 556)**.

The phenomenon of **Burnout (page 556)** is discussed on **pages 556 to 557**. You should be familiar with the following ways to combat burnout, listed on **page 556**: *break your patterns, get away from it all periodically, reassess your goals in terms of their intrinsic worth, and think about your work*.

Ask yourself: Have I ever witnessed or experienced employee burnout? If so, what were some of the ways it was combatted?

Also read about the prevalence of **Employee Depression** on **page 557**.

Ask yourself: Have I ever witnessed or experienced employee depression? If so, what were some of the ways it was combatted?

Page 557 discusses **Solving Computer-Related Ergonomic Problems**. Read this section and make sure

you are familiar with the list of suggestions on **page 557**.

Page 557 also discusses **Repetitive Motion Disorders**.

Page 558 discusses the seriousness of **Workplace Smoking**. Read this section to better understand **What You Can and Cannot Do (Page 558)** and how **Wellness Programs (Page 558)** can help.

Ask yourself: How will my organization handle workplace smoking?

HR as a Profit Center on page 558 discusses the profit of wellness programs.

Ask yourself: How can my organization better utilize wellness programs?

Pages 558 to 559 discuss the enormity of **Violence at Work**. Read this section to better understand **Who is at Risk? (Pages 558 to 559)** and how **Heightened Security Measures (Page 559)** and **Improved Employee Screening (Page 559)** can help employers combat it.

Pages 560 to 561 discuss **Workplace Violence Supervisory Training**. Read this section and make sure you are familiar with the following clues that typically precede violent incidents and the list of tips, on **page 560**, for how to prevent them. The clues are:

- *Typical profiles*
- *Verbal threats*
- *Physical actions*
- *Frustration*
- *Obsession*

Make sure you also read about **Organizational Justice (Page 560)**, suggestions for **Dealing with Angry Employees (Pages 560 to 561)**, tips for **Dismissing Violent Employees (Page 561)**, and some of the **Legal Issues in Reducing Workplace Violence (Page 561)**.

Ask yourself: How can my organization work to avoid violence at work?

OCCUPATIONAL SECURITY AND SAFETY (Pages 561 to 563)

This section discusses how to identify *enterprise risk management*, plan, and set up a basic security plan.

Make sure you are familiar with the four **Basic Prerequisites for a Crime Preventative Plan** discussed on **page 562**.

Pages 562 to 563 discuss **Setting Up a Basic Security Program**. Read this section and make sure understand why organizations should review the following six matters as part of their initial threat:

1. Access to the reception area.
2. Interior security.
3. Authorities' involvement.
4. Mail handling.
5. Evacuation.
6. Backup systems.

After assessing the potential current risk level, employers need to address assessing and improving **Natural Security (Pages 562 to 563)**, **Mechanical Security (Page 563)**, and **Organizational Security (Page 563)**. Read these sections and make sure you are familiar with each.

Ask yourself: How can my organization work to improve its natural security, mechanical security, and organizational security?

Page 563 discusses **Evacuation Plans**. Read this section and make sure you are familiar with the elements that should be covered in an evacuation plan, listed in the text on **page 563**.

Page 563 also discusses **Company Security and Employee Privacy** and the steps employers can take to legally investigate employees.

Activities

Chapter Sixteen Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Five section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Five Discussion Questions (Chapter Sixteen):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Multiple ways to reduce unsafe acts in the workplace are discussed on pages 546 to 550, which three do you think would be most effective and why? Include a brief explanation of your three choices in your answer.

[Note: Your instructor will post the question to the Week One Weekly Discussion Question Forum]

CHAPTER SEVENTEEN

Managing Global Human Resources

KEY LEARNING POINTS

The chapter begins with **The Manager's Global Challenge** on **page 578**.

The Strategic Context on **page 578** discusses the impact of unionizing Wal-Mart stores in China.

Ask yourself: How does Wal-Mart's story inform decisions that might need to be made by my organization? How will we adapt?

ADAPTING HUMAN RESOURCE ACTIVITIES TO INTERCOUNTRY DIFFERENCES (Pages 578 to 582)

This section discusses the challenges of managing intercountry differences. The five critical intercountry differences are: *Cultural, Political, Labor Relations, Legal, and Economic*. (These are illustrated in **Figure 17-1** on **page 579**.)

Pages 579 to 580 discuss the differences in **Cultural Factors**. Read this section and make sure you are familiar with **The Hofstede Study (Page 580)** which identified other international cultural differences.

Page 580 discusses the differences in **Economic Systems** as well as the differences in **Legal, Political, and Labor Relations Factors**. You should be aware of *work councils, codetermination (page 580), and political risks*.

Ask yourself: What do I think the impact of codetermination would be if it was implemented in the United States?

Page 581 discusses the importance of taking a global approach to a company's **Ethics and Codes of Conduct**.

Page 581 also discusses an **HR Abroad Example: The European Union**. Read this section to better understand the challenges of doing business in Europe.

Pages 581 to 582 discuss another **HR Abroad Example: China**. Read this section to better understand the challenges of doing business in China, including: **Recruiting, Selection, Appraising, and Compensation**.

Ask yourself: How can these examples help my organization better prepare to enter the global market, specifically in Europe and China?

STAFFING THE GLOBAL ORGANIZATION (Pages 582 to 589)

Pages 582 to 584 discuss **International Staffing: Home or Local?** Make sure you are familiar with the difference between **expatriates ("expats") (page 582)**, **home-country nationals (page 582)**, and **third-country nationals (page 583)**. The pros and cons of **Using Locals vs. Using Expats** are both discussed on **page 583**.

HR as a Profit Center on pages 584 and 585 discusses reducing expatriate costs.

You should also read **Other Solutions (Page 584)** and **Using Transnational Virtual Teams (Page 584)**. Make sure you are familiar with **virtual teams (page 584)** and their use.

Ask yourself: How can virtual teams help my organization?

Page 585 discusses **Offshoring**

Ask yourself: How do I feel about offshoring?

Pages 585 to 586 discuss **Management Values and International Staffing Policy**. Read this section and make sure you are familiar with the following three classifications of top executive's values:

- **Ethnocentric Practices (Page 585)**
- **Polycentric Practices (Page 585)**
- **Geocentric Practices (Pages 585 to 586)**

Ask yourself: Which practice would I use?

Pages 586 to 587 discuss **Selecting Expatriate Managers**. Read this section to better understand how firms select global managers. You should also be familiar with **Selection testing (Pages 586 to 587)**, including **adaptability screening (page 586)**, and the **Legal Issues (Page 587)** present in selecting employees for assignments. According to the text, there are five factors that are important to an international assignee's success; these are illustrated in **Figure 17-2 (page 587)**. An example Overseas Assignment Inventory is shown in **Figure 17-3 (page 588)**.

Ask yourself: How would I feel about an abroad assignment?

Page 589 discusses **Avoiding Early Expatriate Returns**. Read this section to better understand expatriate assignment failures. Make sure you are familiar with the **Traits of Successful Expatriates**, discussed on **page 589**, along with the **Family Pressures (page 589)** and **What Employers Can Do (page 598)**.

TRAINING AND MAINTAINING EMPLOYEES ABROAD (Pages 590 to 595)

Page 590 discusses **Orienting and Training Employees on International Assignment**. Read this section to better understand the benefits of pre-departure training programs. Also read about the benefits of **Ongoing training**, discussed on **page 590**

Page 590 to 591 discusses some of the issues with **Appraising Managers Abroad**. Read this section and make sure you are familiar with the suggestions for improving expatriate appraisals on **page 591**.

Pages 591 to 593 discuss the challenges of **Compensating Managers Abroad**. The most common approach, **The Balance Sheet Approach**, is discussed on **pages 592 to 593**. It is also illustrated in **Table 17-1 (page 592)**. The text gives a specific example under **Expatriate Pay Example (Page 592)**.

Also read about **Incentives** on **page 592**. You should be familiar with the following examples: **foreign service premiums, hardship allowances, mobility premiums**, all discussed on **page 592**.

Pages 592 to 593 discuss **Steps in Establishing a Global Pay System**. Read this section and make sure you are familiar with the following steps in creating a global pay system:

- Step 1:** Set strategy
- Step 2:** Identify crucial executive behaviors
- Step 3:** Global philosophy framework
- Step 4:** Identify gaps
- Step 5:** Systemize pay systems
- Step 6:** Adapt pay policies

Ask yourself: How will these steps help my organization establish a global pay system?

Page 593 discusses **Labor Relations Abroad**. Read this section and make sure you are familiar with the following four issues that characterize labor relations in Europe:

- Centralization
- Employer organization
- Union recognition
- Content and scope of bargaining

Pages 593 to 594 discuss **Terrorism, Safety, and Global HR**. Read about **Terrorism (pages 593 to 594)** and **Taking Protective Measures (pages 594)**. You should also be familiar with the benefits of **Kidnapping and Ransom (K&R) Insurance**, discussed on **page 594**.

Ask yourself: Would my organization benefit from K&R insurance?

Pages 594 to 595 discuss **Repatriation: Problems and Solutions**. Make sure you read this section and understand the benefits of repatriation programs.

Ask yourself: What kind of repatriation program will we have at my firm?

Improving Productivity through HRIS on **page 595** discusses the benefits of taking a firm's HRIS abroad with the firm's operations.

MANAGING HR LOCALLY: HOW TO PUT INTO PRACTICE A GLOBAL HR SYSTEM (Pages 595 to 597)

This section discusses the best practices for creating and implementing a global HR system. Read this section and make sure you are familiar with the *develop, acceptable, implement* approach, illustrated in **Figure 17-4 (page 596)**, and the following practices:

Page 596 discusses the two best practices for **Developing a More Effective Global HR System**. According to the text, these are:

- Form global HR networks.
- Remember that it's more important to standardize ends and competencies than specific methods.

Pages 596 to 597 discuss the three best practices in **Making the Global HR System More Acceptable**. According to the text, these are:

- Remember that truly global organizations find it easier to install global systems.

- Investigate pressures to differentiate and determine their legitimacy.
- Try to work within the context of a strong corporate culture.

Page 597 discusses the two best practices for actually **Implementing the Global HR System**. According to the text, these are:

- “You can’t communicate enough.”
- Dedicate adequate resources.

Ask yourself: How can my organization benefit from using these practices to implement a globally consistent human resources?

Activities

Chapter Seventeen Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Five section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Five Discussion Questions (Chapter Seventeen):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Compare and contrast international staffing with home-country nationals vs. staffing with expatriates. Include a brief explanation of each in your answer.

[Note: Your instructor will post the question to the Week One Weekly Discussion Question Forum]

CHAPTER EIGHTEEN

Managing Human Resources in Small and Entrepreneurial Firms

KEY LEARNING POINTS

THE SMALL BUSINESS CHALLENGE (Pages 606 to 608)

This chapter begins with an explanation of **Why Small Business is Important**.

Pages 606 to 607 discuss **How Small Business Human Resource Management is Different**. Read this section and make sure you are familiar with the following four main reasons:

- **Size (Page 606)**
- **Priorities (Page 606)**
- **Informality (Page 606)**
- **The Entrepreneur (Page 607)**

Read about the HR **Implications** of these four differences on **page 607**.

Pages 607 to 608 discuss **Why HRM is Important to Small Businesses**. You should read this section, and **The Strategic Context** on **page 608**, to better understand the impact of HRM on small businesses.

Ask yourself: Why is HRM important to my small business?

USING INTERNET AND GOVERNEMENT TOOLS TO SUPPORT THE HR EFFORT (Pages 608 to 614)

This section discusses the benefits of using Internet and government tools to help the HR effort of small businesses. Firms can do this in the following ways:

Pages 608 to 611 discuss the usefulness of using federal websites to help small business in **Complying with Employment Laws**. The **DOL (page 609)** provides a “*FirstStep* Employment Law Advisor” on its website, illustrated in **Figure 18-1 (page 609)**. It also provides a list of “elaws Advisors.” Examples of these can be found in **Figure 18-2 (page 610)**. Both **The EEOC** and **OSHA** also have sites. OSHA’s site is illustrated in **Figure 18-3 (page 610)**.

Ask yourself: Was I aware that all this information was available on the web? How will I use this information?

Page 611 discusses **Employment Planning and Recruiting** and the benefits of **Web-Based Recruiting**.

Pages 611 to 612 discuss useful **Employment Selection** tools. Read this section and make sure you are familiar with the small business recruiting and screening process tips listed in the text. Examine the

sample report in **Figure 18-4 (page 612)** to better understand the use of personnel tests.

Ask yourself: Would any of these tools be useful to my organization?

Pages 612 to 613 discuss the use of online **Employment Training**. Read this section and make sure you are familiar with the following sources: **Private Vendors (page 612 to 613)**, **The SBA, (page 613)**, and **NAM (page 612)**. Some online courses offered by SBA are shown in **Figure 18-5 (page 613)**.

Ask yourself: How can my firm benefit from using Internet training?

Pages 613 to 614 discuss the use of online **Employment Appraisal and Compensation** tools.

Page 614 discusses **Employment Safety and Health** and the free services offered by OSHA, including **OSHA Consultation** and **OSHA Sharp**.

Ask yourself: Would my organization benefit from either of these OSHA services?

LEVEARGING SMALL SIZE: FAMILIARITY, FLEXIBILITY, FAIRNESS, INFORMAILITY, AND HRM (Pages 614 to 621)

This section discusses the need for small business to capitalize on their smallness in regards to their employees. This should translate into *familiarity, flexibility, and informality* with HR practices and policies

Page 614 discusses the need for **Simple, Informed Employee Selection Procedures**.

Two low-tech recruitment and selection tools discussed in the text are **A Streamlined Interviewing Process (pages 615 to 616)** and **Work-Sampling Tests (page 616)**. You should be familiar with both.

Pages 615 to 616 also specifically discuss the steps in a streamlined interviewing process. Read this section and make sure you are familiar with the following steps:

- **Preparing for the Interview**
- **Specific Factors to Probe in the Interview**
- **Conducting the Interview**
- **Match the Candidate to the Job**

Ask yourself: How could my firm benefit from using a streamlined interview process?

Pages 616 to 617 discuss **Flexibility in Training**. Read this section and make sure you are familiar with the **Four-Step Training Process** discussed on **page 616**. The four steps are:

- Step 1: Write a job Description
- Step 2: Develop a Task Analysis record Form
 - Examine the abbreviated *Summary Task Analysis Record Form* in **Table 1801 (page 617)**.
- Step 3: Develop a job instruction sheet
 - See **Table 18-2 (page 617)** for a sample Job Instruction Sheet.
- Step 4: Prepare training program for the job.

You should also read about the **Informal Training Methods** discussed on **page 617**.

Ask yourself: Would the four-step training process work for my organization? What would be the benefits of using one or more of the informal training methods discussed?

Pages 617 to 618 discuss the importance of **Flexibility in Benefits and Rewards**. Read this section to better understand by many small business cultivate **A Culture of Flexibility (page 617)**. Make sure you are also familiar with the example **Work-Life Benefits** listed on **page 617**. The positive impact of **Recognition** is discussed on **page 619** along with the impact of the recent recession, under **Small Business Benefits for Bad Times**. You should read both these sections and the options for **Simple Retirement Benefits** discussed on **pages 619 and 620**.

Page 620 discusses the importance of **Improved Communications**. Read this section and the examples given under **Newsletter, Online, and The Huddle**.

HR as a Profit Center on **page 620** gives another example and discusses how employee feedback helped IHOP reduce turnover.

Ask yourself: Could this system be useful to my organization?

Pages 620 to 621 discuss **Fairness and the Family Business**, specifically in regards to family and non-family employees. Make sure you are familiar with the following steps to reduce “fairness” problems:

- Set the ground rules.
- Treat people fairly.
- Confront family issues.
- Erase privilege.

Ask yourself: What concerns do I have regarding family and non-family employees within a family business?

USING PROFESSIONAL EMPLOYER ORGANIZATIONS (Pages 621 to 622)

This section discusses outsourcing HR functions to vendors known as *professional employer organizations (PEOs)*, *human resource outsourcers (HROs)*, or *employee or staff leasing firms*.

Pages 621 and 622 answer the questions **How do PEOS Work?** and **Why use a PEO? (Pages 621 to 622)**. Read this section to better understand the benefits of using a PEO and the following reasons why employers turn to them:

- **Lack of Specialized HR Support (Page 621)**
- **Paperwork (Page 621)**
- **Liability (Page 622)**
- **Benefits (Page 622)**
- **Performance (Page 622)**

The downsides to PEOs are discussed under **Caveats** on **page 622**. Make sure you are familiar with the **Warning Signs (Page 622)** and the guidelines for finding and working with PEOs listed in **Figure 18-6 (page 622)**.

Ask yourself: How would my firm benefit from the use of a PEO?

MANAGING HR SYSTEMS, PROCEDURES, AND PAPERWORK (Pages 623 to 625)

This section discusses creating a start-up HR system for a new small business. Start by reading the **Introduction** on **page 623**.

Pages 623 to 624 discuss the **Basic Components of Manual HR Systems**. Read this section to better understand the **Basic Forms** needed, see the list illustrated in **Table 18-3 (page 623)**, and the ways to get them.

Page 624 discusses the need for growing small business to start **Automating Individual HR Tasks**. Resources for this are discussed under **Packaged Systems** on **page 624**.

Ask yourself: What sources will my organization use to get our HR forms and software?

Pages 624 to 625 discuss the benefits of installing an **Human Resource Information systems (HRIS)**. Make sure you read the following sections and are familiar the benefits they describe:

- **Improved Transaction Processing (Page 625)**
- **Online Self-Processing (Page 625)**
- **Improved Reporting Capability (Page 625)**
- **HR System Integration (Page 625)**
- **HRIS Vendors (Page 625)**
- **HR and Intranets (Page 625)**

Ask yourself: How would my organization benefit from installing an HRIS?

Activities

Chapter Eighteen Practice Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Five section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Week Five Discussion Questions (Chapter Eighteen):

The purpose of the discussion question is to allow you as the Learner to demonstrate your understanding of the chapter's key learning points and how you might apply them in given situation. Participating in the discussion question forum provides you as the Learner an opportunity to compare your ideas to ideas from others in your class.

Instructions: Using the chapter's key learning points, provide your answer to the question below.

Explain why Human Resource management is different for small businesses. Include a brief description of the negative implications of these difference in your answer.

[Note: Your instructor will post the question to the Week One Weekly Discussion Question Forum]

UNIT FIVE ASSIGNMENTS

Unit Five Exam

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Five section. Select the available activities that may include Practice Exams, Unit Exams and Assignments.

Unit Five Case Study

Read the APPLICATION CASE in page 627 on “Netflix Breaks the Rules.”

Write a 3 to 5 page paper (1000 to 1500 words) in APA format in response to the four questions listed in item 3 of the recommended outline below.

1. Cover page (See APA Sample paper)
2. Introduction
 - a. A thesis statement
 - b. Purpose of paper
 - c. Overview of paper
3. Body – (Cite sources with in-text citations.)
 - a. Explain what it is about Netflix, if anything, that makes their HR practices work for them.
 - b. Argue why you would or would not suggest using similar practices in other businesses, like a new restaurant.
 - c. Discuss the criteria you would use in deciding whether another company would be right for Netflix-type HR practices.
 - d. Respond to the quote in Question 4 about Netflix just being lucky.
4. Conclusion – Summary of main points
 - a. Lessons Learned and Recommendations
5. References – List the references you cited in the text of your paper according to APA format.
(Note: Do not include references that are not cited in the text of your paper)

GRADING

Your instructor will provide a grading rubric to evaluate your paper. Please see the Instructor Syllabus and Policies for details.

Submit your paper to the assignment object.

UNIT SIX

Activities

Week 6 Discussion Question:

Based on what you have learned throughout this course, create a sample human resource strategy for a mock organization of your choosing. This strategic plan should include information from, and decisions informed by, all of the units you have studied.

End of Course Survey

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Six section. Click on the End of Course Survey object to document your feedback regarding the strengths and areas for improvement for this course.

UNIT SIX ASSIGNMENTS

Final Exam:

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Six section. Click on the Final Exam object to test your competency regarding Units 1-5. Good Luck!

Week 6 Project:

Choose one of the following options:

Option 1 – Web Research

Conduct an Internet search to find companies noted for best practices in human resource management. Describe what these best-practices companies do to integrate Human Resource Management. What are the similarities across companies? Describe any major difference. Critique the best practices and state how you would implement the best practices in your organization.

Submit your project in APA format with at least three in-text references. Length: 5 pages (excluding cover and reference pages)

Option 2 – Organization Comparison

Identify two organizations with different environments and core technologies. Describe these differences. Indicate how human resource management of these companies might be similar or different. Provide a rationale for your conclusions using relevant concepts from the text and peer reviewed articles.

Submit your project in APA format with at least three in-text references. Length: 5 pages (excluding cover and reference pages)

Option 3 – Create your own project.

This option provides an opportunity for you to create your own project based on the end of program capstone/dissertation. The project must include the learning objectives of the current course. This option requires the instructor's approval.

Submit your project in APA format with at least three in-text references. Length: 5 pages (excluding cover and reference pages)

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Six section. Once you have finalized and completed your chosen project, click on the Course Project object submit the Course Project.

COURSE PRESENTATION

Choose a topic that is related to one or more of the Course Objectives.

Describe the topic.

State the purpose and the importance of the course topic.

Provide an overview of the presentation.

Create 5 to 6 PowerPoint slides of the content of the topic using 3 to 5 bullets per slide.

Include speaker notes of the presentation.

Note: You could create a live presentation (such as via YouTube) and provide a link to the presentation.

Log into the CalUniversity Learn Center and enter this specified course. Once in the course, scroll down to the Week Six section. Once you have finalized your course presentation, submit to the Course Presentation object.