MGT 624 01

Course Information

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<tr>
<th>Course Number</th>
<th>MGT 624</th>
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<tbody>
<tr>
<td>Course Title</td>
<td>Human Capital Strategy</td>
</tr>
<tr>
<td>Term and Year</td>
<td>Spring 2017</td>
</tr>
<tr>
<td>Class Location</td>
<td>Evans Hall 4420</td>
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<tr>
<td>Class Meeting Time, Day</td>
<td>1:00 - 2:20 pm, Mondays and Wednesdays</td>
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<tr>
<td>Course Support</td>
<td>Sarah Thieneman, 5425B Evans Hall, <a href="mailto:sarah.thieneman@yale.edu">sarah.thieneman@yale.edu</a></td>
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Contact Information

<table>
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<tr>
<th>Professor(s)</th>
<th>TA(s)</th>
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</thead>
<tbody>
<tr>
<td>Name: James Baron&lt;br&gt;Office Location: 5534&lt;br&gt;Telephone Number: 203-432-5801 (office)&lt;br&gt;Email Address: <a href="mailto:james.baron@yale.edu">james.baron@yale.edu</a>&lt;br&gt;Office Hours: By appointment</td>
<td>Name: Matthew Regele&lt;br&gt;<a href="mailto:matthew.regele@yale.edu">matthew.regele@yale.edu</a></td>
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Review Sessions: None

Course Materials

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<tr>
<th>Textbook(s)</th>
<th>No textbook required</th>
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<tr>
<td>Readings</td>
<td>There is no required text for the course. However, many class sessions will include an assigned reading from an incredibly pithy and insightful book: Strategic Human Resources: Frameworks for General Managers (New York: Wiley, 1999), by James Baron and David Kreps (hereafter, Baron &amp; Kreps or B&amp;K). The other readings come from diverse sources, including scholarly books and articles, the popular and business press (including Harvard Business Review), and some practitioner-oriented publications. These have been carefully chosen to reflect varied perspectives and stimulate your thinking. Assigned materials for each class session are available in subfolders on CANVAS, organized by date within “Files”. For each class session, you will find on the website (and at the back of this document) specific discussion or preparation questions to frame your thinking about the materials in advance of class. For a few class sessions, you will find assigned news articles on recent developments in the case/topic we are discussing that were added in real time and are not listed on the course syllabus.</td>
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<td>Software</td>
<td>None</td>
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Course Description and Objectives
Ask CEOs and entrepreneurs what keeps them up at night and their answers invariably include issues relating to human capital—ensuring that the enterprise has in place structures, processes, and routines for attracting, developing, retraining, and retaining the kinds of people needed to execute the business strategy. A number of developments—including deradicalization of the labor force, rapid technological change, increased global competition, and labor market conditions in some sectors with new organizational arrangements, and public policy attention to work force issues—are making human resource management (HRM) increasingly important for organizations, managers, and entrepreneurs. Indeed, some commentators contend that the new economy, with such open access to information, technology, capital, and other resources, adroit human resource management is one of the few remaining sustainable sources of competitive advantage. Aligning human capital strategy with business strategy is arguably the most important and consequential responsibility of the general manager.

Human resource professors aren’t the only people espousing this point of view. The business press, consultants, and management trends increasingly assert that the key success factor in today’s knowledge-based economy is attracting, developing, and retaining great people. In 1998, McKinsey famously dubbed this “the war for talent,” arguing that “superior talent will prime source of competitive advantage. In the new economy, competition is global, capital is abundant, ideas are devolved and cheaply, and people are willing to change jobs often. In that kind of environment … all that matters is talent.” Tale in a 2016 report, the Conference Board forecast labor shortages over the next 10 to 15 years in a number of specialized knowledge-based roles. Consequently, sustained high performance increasingly is likely to depend not simply on attracting talent, but also on doing a better job than competitors of crafting cultures, training regimes, and personnel systems that provide extraordinary results from not-so-extraordinary people.\[2\]

Although many organizations recognize the importance of managing the work force effectively and even “know” what to do to be effective, it is remarkable how many firms and managers fail to implement these approaches. Consequently, this course will focus on the central themes: (1) How to think systematically and strategically about aspects of managing the organization’s human resource topics from a strategic perspective. The ability to diagnose and improve the alignment between people and strategy is invaluable not only for aspiring general managers and entrepreneurs, but also for those interested in HR strategies aimed at leveraging the organization’s work force.

Our purpose is not to get into technical details of issues that are primarily relevant to those intending to be human resource professionals. The course draws upon the psychometric aspects of test validation, the specifics of job evaluation methods, details of interviewing met the intricacies of employment law. Rather, the course adopts the perspective of a general manager or entrepreneur, a human resource perspective. The ability to diagnose and improve the alignment between people and the strategy is invaluable not only for aspiring general managers and entrepreneurs, but also for those interested in HR strategies aimed at using the conceptual material in an analytic way. To help focus your analysis, a set of practice questions for each class session is included in the syllabus packet. These can be used to guide your case preparation. The course will generally include both a case discussion and a short wrap up mini-lecture on relevant material. We are also fortunate to have a number of diverse experienced practitioners who will visit the class as guest speakers, adding their invaluable perspective.

This course is designed to be integrative, drawing upon foundational material from a number of core courses. Our orientation will be both analytical and managerial, focusing on the development of concepts and strategies that managers can use to improve the value of the people in their organizations. To integrate the conceptual and applied material, we will use a series of case studies illustrating both successes and failures. Those cases have been selected to reflect diverse circumstances as well as a wide range of firm types (e.g., startups versus established organizations), industries (e.g., high tech, professional services, manufactoring, arts, education, sectors (for profit versus nonprofit), contexts (e.g., unionized versus nonunion enterprises), and countries. Each case will provide an opportunity to use the conceptual material in an analytic way. To help focus your analysis, a set of practice questions for each class session is included in the syllabus packet. These can be used to guide your case preparation. The course will generally include both a case discussion and a short wrap up mini-lecture on relevant material. We are also fortunate to have a number of diverse experienced practitioners who will visit the class as guest speakers, adding their invaluable perspective.

In a course dealing with managing people, it’s essential that we take advantage of the experience of class members. It is relevant, please bring your own experiences and illustrations into class discussion. Throughout the course—virtually in every class session—we will consider how what we are discussing differs across countries and cultures. Students with global experience, both positive and negative, are an invaluable source of data for this learning. If you have specific expertise about an organization, industry, country, or another culture, I strongly encourage you to notify me of this in advance, so that you can leverage your insights in class.

The course is divided into four main sections. We begin by briefly considering how to conceptualize employment relationships and human resource systems (Sessions 1-3). We address the importance of aligning human resource practices so that they are internally consistent and produce the skills and behaviors required to make the business strategy work. We also consider when to internalize versus outsource specific tasks and when and why we might expect to see employment relationships characterized by unionization or other forms of shared governance. Next, in the main section of the course, we examine the main HR levers available to managers and their relationship to the development of an effective personnel system (Sessions 4-17). The third section (Sessions 18-23) examines a number of contemporary human resource challenges confronting organizations at different stages of development, and some public policy concerns raised by how firms manage their human resources (e.g., downsizing, the living wage). The fourth section (Sessions 24-26) will consist of presentations and discussion of team projects (details below), followed by a brief course wrap-up.

We are very fortunate that some extremely distinguished, talented, and diverse leaders will join us in class to share their perspectives on their own careers and leadership experiences. These “Perspectives” sessions are indicated in the course outline below. We have had to schedule around these leaders’ hectic calendars, so please forgive a few instances where a speaker may seem somewhat “out of sequence” relative to the flow of the course. To ensure that these sessions are as candid and productive as possible, you are required to treat all information shared (verbally or otherwise) in connection with these visits as “off the record” and strictly confidential unless informed otherwise by the speaker or by me.

Given the breadth of the subject matter, we’re unable in the time allotted to address adequately a number of important included some optional readings on the syllabus, which you can access in a separate folder within each class session “Files” on CANVAS. I am always happy to recommend additional supplementary readings and cases, and your team project provides another way of exploring issues that particularly interest you.

Course Requirements

| Write-Ups | Three brief written assignments are due during the course (submitted via Canvas), of which at least two must be submitted prior to the Spring Recess. See “Description of Assignments/Projects” below for more information. | 20% |
| Team Project | An HR-related project in teams of 4-6 students. The project includes a presentation near the end of the semester, and a written report. See "Description of Assignments/Projects" below for more information. | 45% |
| Class Participation | Class participation grades will reflect an assessment of your total contribution to the learning environment (quality and professionalism). See "Description of Assignments/Projects" below for more information. | 35% |

Please see the Yale SOM Grading Policy at http://portal.som.yale.edu/page/grading-policy

Descriptions of Assignments/Projects

Write-Ups

To gauge your comprehension of course materials and provide you with ongoing feedback, three brief written assignments are due during the course, of which at least two must be submitted prior to the Spring Recess. The write-up assignments involve submitting (via the Assignments feature on CANVAS) written responses to the discussion or preparation questions assigned for a particular class session, before the start of that class session. You may prepare and submit a write-up for any class session that has a case or specific company assigned to it. Students also have the option of submitting a fourth write-up, in which case the lowest scoring write-up will be dropped and the three remaining write-ups retained for purposes of computing course grades.

Class Participation

As noted above, informed and broad-based class participation is essential for this course to be successful. It is particularly vital that we take advantage of the experience of class members. Where relevant, please bring your own experiences and illustrations into class discussion, and please notify me in advance if you have specific expertise or experience pertaining to a topic or case that we will be discussing in an upcoming class.

Class participation grades will reflect my assessment of your total contribution to the learning environment. This reflects not just the frequency of your class contributions, but also: (1) their quality (ability to draw on course materials and your experience productively, ability to advance or sharpen in-class discussion and debate, willingness to take risky or unpopular points of view, use of logic, precision, and evidence in making arguments); and (2) the professionalism of your conduct (attendance, punctuality, preparedness, respecting section members and their contributions, and refraining from conduct that is distracting).
The dimensions of class participation that I value most are captured in the peer feedback tool I have created for this class. Twice during the course, you will provide feedback to your project teammates about their contributions to your learning, using a web-based tool accessible from the course website. (The feedback, submitted electronically, will be anonymous to your peers but not to me. I will describe how the feedback will work in more detail in class and how you’ll be able to access the ratings you receive from your peers.) You will also have the opportunity to provide optional feedback of the same sort to any classmate regarding his/her contributions to the learning environment.

For more information, check out the “Peer Feedback” section of the class web site.

Team Project

The best way of integrating and internalizing the material we will cover in this class is through practical application. Accordingly, all students will undertake an HR-related project in a team of 4-6 people. The project has two deliverables: a presentation in class near the end of the Spring semester; and a written report. There are very few limits on what you can or cannot do in your project, but there are some important requirements. For details, see the “Team Project Description” document in your syllabus packet (also available on the class web site). Part of your grade for the project will be based on the whole group’s written report and the presentation. I will also provide a mechanism for grades to be adjusted based on individual contributions within your team, as judged by fellow team members. Each team will determine for itself what fraction of the team project grade will depend on peer assessments, from a minimum of 20% to a maximum of 100%.

To help with project management, teams are required to submit a project proposal quite early in the course, and several progress reports are due throughout the course, updating me on your team’s work to date (see Schedule below). I am happy to consult with your group about potential project sites, and I have a few leads that may be useful.

Yale SOM Policies

Please see the Yale School of Management Bulletin at http://www.yale.edu/printer/bulletin/htmlfiles/som/rights-and-responsibilities-of-students.html for Rights and Responsibilities of students and for information on requesting a course recording.

Laptop/Device Policy

Usage not allowed without the express permission of the instructor.

Classroom Values, Expectations and Logistics

Organizing Principles and Values

In designing the content and delivery of this course, I’ve incorporated a few basic beliefs and values that are worth making explicit:

- Students and faculty collectively are responsible for the learning that goes on inside and outside the classroom. The in-class experience depends on your preparation and contributions, as well as mine. What you learn depends on everyone’s joint effort.
- You’re entitled to expect me to work very hard at promoting your learning. I will have equally high expectations of you.
- Conceptual frameworks and real-world experiences are complements, not substitutes. Hence, we’ll focus on linking the two.
- Trusting and respecting people generally costs less and works better than trying to control them.
- Many significant human resource challenges you’ll face in your career will concern teams to which you belong or which you manage. Your interactions with classmates—during case discussions, on your project team, in a study group—are themselves important “data” to which you should pay close attention in thinking about the effective management of people and your own professional development.

I’ve sought to organize and run the course in accordance with these values and beliefs. This includes an emphasis on teamwork, mutual trust and respect, and information sharing. To reinforce students’ collective responsibility for the learning environment and for aiding one another’s professional development, we will utilize a web-based peer feedback tool. In addition to helping illustrate some issues in performance management, the tool will provide an opportunity for class members to provide feedback to their colleagues on their contributions to the learning environment. I very much hope that if a particular classmate is having a strong impact on your learning (positively or negatively), you will take it upon yourself to provide that person with some concrete behavioral feedback, via the same feedback tool that we will be using for providing peer feedback to project team members.

I very much welcome any feedback you care to provide to me during the quarter about the course, communicated in any form you are comfortable with (verbally, office hours, an anonymous note or e-mail if you prefer, etc). I will also conduct a mid-course evaluation on the class and my teaching around the halfway point.

Expectations

Preparation before class. Please come prepared for each class session, having read the assigned case and background reading carefully. I will use a variety of techniques to stimulate class discussion and to ensure broad participation from all class members, including randomized cold and warm calls.

Absenteeism and tardiness. Absenteeism, tardiness, and disruptive behavior (leaving the classroom excessively, side conversations, etc.) will adversely affect your grade, and the impact increases with each instance. Absences cannot be made up through written work. The reason for
this policy goes back to the culture of collective responsibility for learning I wish to promote. When you are absent or tardy, learning opportunities for your classmates are diminished. Please notify me and the TA in advance via e-mail if you must miss a class session.

Class wrap-ups. In a typical class, I’ll provide a wrap-up at the end, and I will usually distribute a handout with a few of the main Powerpoint slides. I will post the entire presentation on the course web site after class, but I do not distribute hard copies of the entire slide decks for several reasons above and beyond saving trees: (a) I’m often revising the presentation until just before class (and sometimes deciding in real time whether to include specific material or not); (b) as you’ll soon discover, I always have many more slides than I will get to during class; and (c) most importantly, I’ve found that distributing the slides in advance can get in the way of students’ paying attention to the major themes of the wrap-up. Hence, I have settled on this middle-ground approach.

Laptops and other technologies. To make the learning environment as engaging as possible for everyone, I ask that you refrain from using laptops, notebooks, iPads, Kindles, smart phones, dumb phones, pagers, PDAs, handhelds, power tools, kitchen juicers, pasta makers, dental equipment, and the like during class. Summaries of important points will be made available to you for each class session, so you should not need to take copious notes during class, thereby allowing you to focus on and participate in class discussion.

Feedback from me. If you desire feedback on your class participation (or any other facet of your performance) at any point in the course, please feel free to contact me.

Study groups. Although study groups will not be pre-assigned and are not mandatory, I encourage you to join and participate actively in a study group. This is an invaluable resource—not only for digesting the course materials, but also for sharing diverse managerial experiences with human resource issues, which can be a key part of your learning in this class. On occasion in class, I may select class members to make presentations with their study group members on a particular case or issue; if you are selected for such a presentation and are not part of a study group, you’ll have to fly solo.

Course Website

A website for this course will be maintained on CANVAS and I plan to use it regularly. The web site will contain: current announcements; course syllabus and study questions; downloadable copies of any handouts or notes distributed in class; links to web sites that may be of interest; and information on (and a link to) the peer feedback tool for the course. There will also be a bulletin board, which I hope you will use to post comments and questions based on class materials and in-class discussions. I encourage you to check the web site regularly. If you must miss a class session, please check the website for any materials you may not have received.

Where available, URLs are provided in the syllabus outline for links to organizations that we will be discussing in class. You may want to visit these web sites to get additional background and updated information on these enterprises.

Key Dates to Remember

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<tr>
<th>#</th>
<th>Date</th>
<th>Note</th>
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<tr>
<td>1</td>
<td>January 23 (Monday, 1:00 - 2:20 pm)</td>
<td>First class meeting</td>
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<tr>
<td>2</td>
<td>February 8 (Wednesday, before start of class)</td>
<td>Written project proposal description due to Professor Baron</td>
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<tr>
<td>3</td>
<td>February 22 (Wednesday, before start of class)</td>
<td>Written project update due to Professor Baron</td>
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<tr>
<td>4</td>
<td>February 24 (Friday, before 5:00 pm)</td>
<td>First round of online peer feedback to project teammates due</td>
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<tr>
<td>5</td>
<td>March 8 through March 26</td>
<td>NO CLASSES (Spring Break)</td>
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<tr>
<td>6</td>
<td>April 10 (11:45 to 12:55)</td>
<td>Special lunchtime class session</td>
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</tbody>
</table>
| 7 | April 24 through May 3 | Project team presentations in class.  
Note: E-mail your slides (and any background material for classmates) to Prof. Baron and the TA at least 24 hours in advance. |
| 8 | May 13 (Saturday, before 5:00 pm) | Final project write-up due (PDF format) due (via email to instructor and TA)  
Second (final) round of online peer feedback for teammates due |
Tentative Course Outline*

*Visits by several guests were still pending when this syllabus was prepared, so there may be some minor changes to the class schedule to accommodate visitors’ schedules.

<table>
<thead>
<tr>
<th>Class</th>
<th>Date</th>
<th>Topic</th>
<th>Readings</th>
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<tbody>
<tr>
<td>1</td>
<td>Jan 23</td>
<td>Overview: HRM as Sustainable Competitive Advantage</td>
<td>Baron &amp; Kreps, <em>Strategic Human Resources: Frameworks for General Managers</em> (hereafter, B&amp;K): Chapters 1, 2, and 3. View an 11 minute video (on CANVAS) of Herb Kelleher in late 1994, explaining to an internal audience within Southwest Airlines the threat posed by United’s Shuttle.</td>
</tr>
</tbody>
</table>
8 Feb 15 Performance Management, Part I
B&K, Chapter 10


9 Feb 20 Performance Management, Part II

Skim: Adler et al., “Getting Rid of Performance Ratings: Genius or Folly? A Debate,” Industrial and Organizational Psychology (June, 2016)

10 Feb 22 People Analytics

Skim Google’s website discussing its approach to People Analytics: https://rework.withgoogle.com/subjects/people-analytics/

11 Feb 27 Training, Development, and Talent Management
B&K, Chapter 15

Optional: Cappelli, “A Training Gap, Not a Skills Gap” and “The Way Forward,” Chapters 5 and 6 in Why Good People Can’t Get Jobs: The Skills Gap and...

12 March 1 Reward Systems
B&K, Chapters 11 & 12
View Daniel Pink’s discussion of motivation and rewards on: https://www.youtube.com/watch?v=uoXPruFJIC

13 March 6 Promotion Systems and Career Paths
B&K, Chapters 8 and 16
Benko and Weisberg, “From Ladder to Lattice: The New Workforce Imperative,” Excerpt from Mass Career Customization: Aligning the Workpl...

14 March 27 Job Design and Job Crafting
B&K, Chapter 13
Wrzesniewski et al., “Turn the Job You Have Into the Job You Want,” Harvard Business Review (June, 2010) [Reprint R1006K]

15 March 29 Global HRM
Stephan et al., “The Global and Local HR Function: Balance Scale and Agility,” Excerpt from Global Human Capital Trends 2014 (Deloitte Unive...


16 April 3 Layoffs and Downsizing
Sucher et al., “Layoffs: Effects on Key Stakeholders” (rev. 2014) [HBR 9-611-028]
Sucher et al., “Layoffs: Management Implications and Best Practices” (rev. 2011) [HBS 9-611-029]

Optional: Zatzick and Iverson, “High-Involvement Management and Workforce Reduction: Competitive Advantage or Disadvantage,” Acad. Mgn
Optional: Maertz, Wiley, Lereuge, and Campion, “Downsizing Effects on Survivors: Layoffs, Offshoring, and Outsourcing,” Industrial Relations ["
<table>
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<tr>
<th>Date</th>
<th>Time</th>
<th>Event</th>
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Castilla, “Achieving Meritocracy in the Workplace,” MIT Sloan Management Review (Summer, 2016) [Reprint #57421]  
Chu, “Making it Work,” Inc. (June, 2015)  
Christian Science Monitor, “Americans with Disabilities May Be the Best Workers No One’s Hiring” (August, 2013), http://www.salon.com/2013/0 ans_with_disabilities_may_be_the_best_workers_who_cant_get_jobs_newscred/  
Materials on Achievement First (to be distributed)  
Dacia Toll bio on Achievement First website, http://www.achievementfirst.org/about-us/leadership-team/#DaciaBio |
Eisenmann and Wagonfeld, “Scaling a Start-Up: People and Organizational Issues” (2014) [HBS #9-812-100] |
| 22 April   | Inequality and the Living Wage | Heymann and Barrera, “Providing All Employees with More Than a Living Wage,” Excerpt from Profit at the Bottom of the Ladder: How Raising 1 Workers’ Earnings Will Boost Your Profits (2010)  

**Part IV: Presentations & Wrap-Up**

<table>
<thead>
<tr>
<th>Date</th>
<th>Presentations (3)</th>
<th>Read background information distributed in advance by presenting teams</th>
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<tr>
<td>23 April</td>
<td>Presentations (3)</td>
<td>Read background information distributed in advance by presenting teams</td>
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<tr>
<td>24 April</td>
<td>Presentations (3)</td>
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<tr>
<td>25 May</td>
<td>Presentations (3)</td>
<td>Read background information distributed in advance by presenting teams</td>
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<tr>
<td>26 May</td>
<td>Presentations (2)</td>
<td>Read background information distributed in advance by presenting teams</td>
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<tr>
<td>27 May</td>
<td>Wrap-Up &amp; Benediction, Course Evaluations</td>
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<td>#</td>
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<td>Topic</td>
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| 1   | January 23 | Overview: HRM as Sustainable Competitive Advantage | 1. What is Southwest’s competitive strategy? What are the sources of its success? How does it make money?  
2. What are the foundations of Southwest’s competitive advantage?  
3. How are these sources of competitive advantage produced and sustained by what the organization does and how it does it?  
4. To what extent are Southwest’s sources of advantage difficult to imitate and likely to persist over time?  
5. How serious is the competitive threat? To what extent can United and/or Continental (or currently, easyJet, JetBlue, et al.) duplicate Southwest’s business model? Why or why not?  
6. What issues should Ann Rhoades raise at tomorrow’s meeting? What recommendations should she make? |
| 2   | January 25 | Boundaries of Employment Relations: Outsourcing and Contingent Workforce | 1. If you were an external consultant, what would you recommend to Dave Walker? Why?  
2. What advice would you give Walker with regard to implementing your recommendation? What information would you communicate about any changes to employees? How? When?  
3. Did the last place where you were employed utilize outsourcing and/or rely extensively on ‘contingent’ workers (independent contractors, temps, leased employees, etc.)? If so, how effectively was this managed? Explain. |
2. Critics have raised several concerns about unionization in the public sector (versus the private sector), including teachers unions. Do you think these concerns are justified? Why or why not?  
3. What recommendations would you give to management and policy makers to make relationships with the teachers unions as productive as possible? Are there differences between these recommendations and those you would give to private sector employers? Why or why not?  
4. What experience, direct or indirect, have you had dealing with unionized employees? How did the existence of a union affect employees, management, and the organization, positively and/or negatively? |
| 4   | February 4 | Organizational Design | 1. What are the strengths and weaknesses of the organizational design at Schuberg Philis? To what extent is the organizational structure aligned with the strategy and consistent with other human resource "levers"?  
2. How is coordination and control achieved within Schuberg Philis?  
3. What would you recommend that Schuring do with regard to the Philips opportunity? Why?  
4. At your most recent place of employment, how well aligned was the organizational design with the overarching strategy? How consistent was the organizational structure with other HR "levers" or practices? Explain.  
5. Would you like to work in a "holacracy" of the sort that Tony Hsieh created at Zappos? Why or why not? When would you expect self-management to work well versus poorly? |
| 5   | February 6 | Recruitment and Selection, Part I | 1. With reference to the Recruitment of a Star case, answer the following questions:  
   a. Whom should Stephen Connor hire? Why?  
   b. Imagine yourself in the place of each of the candidates. What strengths would you bring to light during the interview with Stephen? How would you distinguish yourself from the other candidates?  
   c. Evaluate the selection and hiring processes at Rubin, Stern, and Hertz. What changes, if any, would you recommend? |
| 6   | February 8 | Recruitment and Selection, Part II | TO BE DISTRIBUTED |
| 7   | February 13 | Mission and Culture | 1. What has enabled Herman Miller to survive and flourish over the long term in a highly volatile industry? What are the company’s distinctive strengths?  
2. What makes Herman Miller “mission-driven”? How does the company embed and "live" its mission?  
3. What are the obstacles or challenges associated with the SHIFT strategy that CEO Brian Walker and his team have adopted? Is Herman Miller’s culture an asset or a liability in implementing the SHIFT strategy?  
4. What should Brian Walker be concerned about? What steps would you (not) take if you were in his shoes? |
### Performance Management, Part I

1. What thoughts, emotions, and concerns do you imagine Margaret Jefferson is having as she contemplates the decision to end Hart's employment with the company? How do you expect this might affect her judgment in this case?

2. What is your impression of Jefferson’s basic hiring procedure? How might it be approved, bearing in mind the resource constraints she faces?

3. What is your opinion of how Jefferson has managed Guy Hart and his performance to this point? Are there things you would have done differently? Explain.

4. Should Jefferson fire Hart? Why or why not? What might Jefferson do to salvage him? Provide the rationale for your answer, being explicit about the factors you are taking into consideration (and their relative importance).

5. What effects, positive and negative, would you expect firing Hart to have on the organization?

6. Recall the last time you experienced a review of your performance (through a conversation or meeting, not just in writing). What were your concerns before the review? After the review? What did the person conducting the review handle well? What did he or she handle poorly?

### Performance Management, Part II

1. What considerations have driven so many companies lately to radically redesign their approach to performance management? What factors and objectives were of particular importance at the GAP?

2. If you were working at GAP during the transition to the new performance management model (GPS), what concerns would you have: (a) as a line employee; (b) as a manager responsible for managing the performance of your subordinates?

3. The readings (particularly the debate in Industrial and Organizational Psychology) summarize the scholarly and practitioner arguments for and against dismantling traditional performance management methodologies, such as ratings and rankings. Which side of the argument do you find most persuasive? Why?

4. Based on the readings and your own experience, what steps must be taken by organizations doing away with traditional performance reviews in order to wind up with an effective performance management process?

### People Analytics

1. What factors do you think might impede the adoption of “people analytics” by human resources practitioners?

2. In making employment-related decisions, companies increasingly are analyzing diverse sources of personal information on current and potential employees, such as private Facebook sites, email traffic, engagement scores, social sensors that track individuals, and the like. And when companies provide diverse benefits to employees (health care, shopping discounts, gym memberships, etc.), they potentially gain access to additional sources of data that could be applied toward “predictive analytics.”

   a. What ethical issues are raised by companies’ increasing reliance on these diverse sources of data in making decisions relating to employees?

   b. What limitations, if any, do you think there should be on companies’ initiatives in the domain of people analytics?

### Training, Development, and Talent Management

1. How would you evaluate Infosys’ approach to training, development, and talent management? To what extent is talent management at Infosys aligned with the firm’s business strategy and consistent with other human resource levers used by the company?

2. What should Pai do about the attrition problem? Should he adopt the “internal market” proposal described at the end of the case? If so, how should he implement it? If not, what alternatives would you recommend for dealing with the attrition problem?

3. Economic theory suggests that employers will only bear the costs of training employees in skills that are firm-specific, whereas workers must bear the costs of acquiring so-called “general human capital” (knowledge and skills that can be applied in disparate organizational settings, such as an MBA degree). Yet some of the training that Infosys provides, according to the case, appears to involve skills (e.g., technical knowledge, managerial competencies) that are applicable in a wide variety of settings, rather than only at Infosys.

   a. Why might Infosys be providing such training?

   b. What steps does/could the company take to reduce the likelihood of trained employees leaving the company to apply their newly-acquired skills elsewhere? How does/could the firm avoid adverse selection, whereby only the worst of their trainees remain with the company while the best and brightest are snapped up by competitors?
<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>March 1</td>
<td>Reward Systems</td>
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<tr>
<td></td>
<td></td>
<td>1. What are the goals of an effective pay-for-performance (PFP) system?</td>
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<td>2. What are some potential differences between implementing PFP in unionized settings (such as the Edwards School of Business) versus non-union enterprises?</td>
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<td>3. After reading the case on merit pay at the University of Saskatchewan (Edwards School of Business), answer these questions:</td>
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<tr>
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<td></td>
<td>a. What are some advantages and disadvantages of the changes made to the merit system during the last round of collective bargaining at the University?</td>
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<td>b. What are some potential differences between implementing PFP in unionized settings (such as the Edwards School of Business) versus non-union enterprises?</td>
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<td></td>
<td>c. The system adopted at Edwards School of Business folds any merit award received in a given year into the recipient's base pay for subsequent years. Is this a good or bad idea? Explain.</td>
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<td></td>
<td>d. What problems or concerns would you anticipate arising under the new points-based merit system? How might these challenges be addressed?</td>
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<td>e. Are the human resource practices of Edwards School of Business and the University of Saskatchewan internally consistent and aligned with the overall organizational strategy? Explain.</td>
</tr>
<tr>
<td>13</td>
<td>March 6</td>
<td>Promotion Systems and Career Paths</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. What are the advantages and disadvantages of promoting from within?</td>
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<td>2. What is the main problem that Jan Walstrom must address at CH2M HILL? What are the concrete manifestations of the main problem she is facing?</td>
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<td>3. What are the root causes of the main problem and its manifestations?</td>
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<td>4. What differences exist among the various generations of employees (e.g., Boomers, Millennials) employed at CH2M HILL?</td>
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<td>5. What should Walstrom do to address the human resource problems facing the firm?</td>
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<td></td>
<td></td>
<td>6. What would you do as an employee of CH2M HILL to manage your own career?</td>
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<tr>
<td>14</td>
<td>March 27</td>
<td>Job Design and Job Crafting</td>
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<td>1. Faculty at SOM are expected to excel in three domains of activity: research, teaching (including curriculum development as well as delivery), and “citizenship” (helping to support the institution). Does this job design make sense? What are the arguments for and against bundling these three different activities into a single job?</td>
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<td>2. Wrzesniewski et al. advocate “job crafting,” whereby individuals seek to transform their jobs in ways that leverage their distinctive interests, abilities, and aptitudes. Under what circumstances would you expect such job crafting to be most beneficial for the individuals and organizations involved? When do you think it might create problems?</td>
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<td>3. Baron and Kreps suggest some key dimensions or parameters of job design (Chapter 13, p. 314) and some key objectives or criteria for assessing job design (Chapter 13, p. 315). Describe and evaluate your last job in terms of these dimensions and objectives.</td>
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<tr>
<td>15</td>
<td>March 29</td>
<td>Global HRM</td>
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<td>1. Why do global enterprises rely so heavily on international mobility and the use of expatriates? What are the benefits and drawbacks from doing so?</td>
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<td>2. A perennial tension in global organizations concerns the appropriate degree of centralization versus decentralization in human resource management.</td>
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<td></td>
<td></td>
<td>a. Based on the readings, the case, and your own experience and intuition, what factors should push an organization in the direction of pursuing a more centralized approach to the management of its human resources? What factors should push an organization in the opposite direction?</td>
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<tr>
<td></td>
<td></td>
<td>b. Which domains of human resource management do you think it is most important to centralize within a complex global enterprise? Why?</td>
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<td>3. What do you see as the strengths and weaknesses of how Solvay Group manages international assignments and the use of expatriates?</td>
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<td>4. What advice would you give Marcel Lorent in dealing with the challenges he is facing with the four candidates for international assignments who are discussed at the end of the Solvay Group case?</td>
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<td>5. Lorent seeks to quantify the ROI from Solvay’s international mobility program. Do you think this is feasible? If so:</td>
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<tr>
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<td></td>
<td>a. Is it advisable for him as the HR Manager for International Mobility to do so?</td>
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<tr>
<td></td>
<td></td>
<td>b. What analysis would you recommend that he do to quantify the benefits and costs of the company’s international mobility program?</td>
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</tbody>
</table>
1. Have you ever been at an organization during a downsizing? Which HR practices worked well and which didn’t? What actions did your organization take (or not take) before, during, and after the layoffs? What general conclusions can be drawn from your specific experience?
2. What criteria should be used in deciding how to initiate or implement a reduction in force?
3. Are there any compelling reasons why a firm should give severance pay? Is it just to be nice? If not, how can you justify this practice?
4. Many industrialized economies restrict whether and how firms can implement layoffs; by comparison, the United States is relatively laissez faire in this respect. What are the advantages and disadvantages of such restrictions? In your view, do the advantages outweigh the disadvantages?
5. With respect to the Bradley Marquez: Reduction in Force (A) case:
   a. Was the reduction in force predictable? Could the firm’s leadership have done things differently to avoid the downsizing?
   b. What lessons should Bradley learn from the Vail experience?
   c. What should Lauder do now? What should Rollins do?

1. How do you evaluate Shell’s progress in the domain of Diversity and Inclusion to date (i.e., in the time period covered in the case)?
2. What do the terms “best,” “merit,” and “fair” mean in the context of Diversity and Inclusion?
3. How compelling is Shell’s “business case” for Diversity and Inclusion? What obligations, if any, do you have as an organizational leader if the business case is not compelling?
5. In your own experience, what organizational practices have you seen work well versus poorly in efforts to achieve diversity and inclusiveness in the workplace?
TEAM PROJECT ASSIGNMENT

Purpose

Working in a group of four to six, your task is to examine the human resource system of an organization (or a particular subunit) or multiple enterprises (see below for other options). The exercise has multiple objectives:

(a) To give you experience applying course materials and frameworks to a real-world situation;
(b) To sharpen your clinical and analytical skills in analyzing HR alignment and consistency;
(c) To gain some understanding of the barriers and challenges involved in designing and changing human resource practices in organizations;
(d) To work collaboratively with your classmates; and, by paying attention to how your group functions, gain insight into what makes self-managing teams effective or ineffective;
(e) To furnish a larger pool of information on which we can draw in class discussions. (I hope you'll share what you are learning from your project where/when it is appropriate during class.)

Assignment

The following are four different options for the type of group project you might wish to do:

Option 1: OVERALL AUDIT

Select an organization of interest. Adopting the role of an outside consulting group, describe and evaluate the internal consistency of the organization’s HR policies and practices, and provide an analysis of how well aligned the HR system is with the organization’s strategy and context. Where you observe inconsistencies or instances of poor alignment (either at present or in the foreseeable future), outline what you see as the causes and preferred solutions.

Option 2: PROBLEM ANALYSIS AND RECOMMENDATIONS

Select an organization of interest and identify an HRM decision or problem it faces—either directly involving some element of the HR system or a broader issue in the enterprise (e.g., in Sales) that relates to how it manages employees. Taking the role of external consultant, diagnose the sources of the problem and provide the client organization with recommendations about what the organization should do. Make sure that what you recommend is feasible considering the specific context. Also, in identifying and analyzing the problem, be sure to relate the problem and your solution to other elements of the HR system that are interdependent and to the larger organizational context. (In other words, don’t look at this problem in a vacuum.)

Option 3: FORMULATE HR BLUEPRINT

Identify a young and/or rapidly growing organization. Describe and critically evaluate its current HR policies/practices. Where did these policies and practices come from? How consistent are they with one another and with the organization’s context? Taking the role of external consultant, offer recommendations for what the organization needs to do (now and/or in the future) to develop successfully. (For instance, if the enterprise is growing or diversifying, what changes are needed to successfully accommodate to that growth or diversification? If the enterprise is young, what changes will be needed as it matures?)

Option 4: RESEARCH SURVEY AND RECOMMENDATIONS

Select a topic and a particular industry or sector of interest to your team. Illustrative examples might include:

1. What has been the experience to date of financial and professional service firms that have done away with conventional performance appraisals?
2. What recent experiments or innovations have occurred in the professional development of K-12 teachers? What factors seem to be driving where the experimentation is taking place and what the results are?
3. What cultural and organizational challenges have enterprises in [choose a sector of interest] commonly faced when seeking to internationalize? Is there an agreed upon set of “best practices” in this domain?

Survey the existing scholarly and practitioner literatures on the topic. If possible, interview some individuals who have directly grappled with the topic. Distill what you have learned, including a set of recommendations that you would make if you were writing a white paper on this topic for a
consulting firm, government agency, etc.

Whichever of these four options you pursue, be sure to draw explicitly on course concepts and materials, as well as your common sense and things you’ve learned in other courses. Bear in mind that you are assuming the role of external consultant, so be sure to: (a) specify who your client is; (b) provide a precise description of the nature of any problems you identify and your diagnosis of their root causes; and (c) offer a range of possible recommended solutions, including your best assessment of their costs and benefits and advice about how to implement your recommendations.

Examples and Ideas

Here are some examples of successful past projects:

1. A large retail chain adopted a performance-related pay plan for store employees. The team obtained data from the firm on pilot projects where the various alternative plans were introduced at a limited number of stores, analyzing the effects of the programs on costs and on sales and offering recommendations about details and implementation of the final plan.

2. A large, local non-profit arts organization was concerned about the lack of diversity among their performers. The team analyzed the “pipeline” of available and training artists and the hiring policies of the client organization as well as similar organizations in the same labor market. They drew conclusions about the importance of this issue to the organization and made recommendations for improvement.

3. A large financial institution had a program to recruit the best and brightest students out of the most prestigious undergraduate institutions, put them through a rotating training program that exposed them to a variety of aspects of the business, and immediately enrolled them in a part-time MBA program. The team evaluated the success of this program and made recommendations about the program going forward.

4. A medium-sized high-tech company had implemented a broad-based stock option program. The team obtained data on employee performance and turnover, as well as employee option grants and exercises. They drew conclusions about the success of the options program and evaluated the program relative to alternative compensation schemes.

5. A few years ago, workers at Yale and other universities fought for a “living wage.” Rather than paying market wages, the universities were pressured to pay a sum considered adequate to support a reasonable standard of living. A group evaluated the University’s options in the face of this political pressure.

Requirements and Timeline

1. Project Proposal Description:

Your group’s project proposal should contain the following information:

- A list of your team’s members
- “Client’s” name and expectations about what your team will be providing to them and when
- A brief (no longer than a few pages) overview of your proposed project, the problem area(s) you will address, and the steps you will take (e.g., interviews, archival data, surveys, etc.) to acquire sufficient background information.
- The fraction of the project grade that will reflect peer assessments of fellow team members (see below).
- An example of the project management tools/templates your team will use to manage the project (see below).

2. Project Update:

You should submit a 2-3 page status report (you can attach tables and graphs, as well) summarizing: your initial findings; if relevant, an update on the goals of the project; any difficulties team members have confronted in working together effectively. This report should include updated copies of the project management tools you are using to organize and track progress on your project (see below).

3. First Peer Assessments of Team Members:

In class, I will distribute information about how you team members will provide and receive peer feedback from one another, assessing their contributions thus far. (It is up to you whether or not to keep your feedback anonymous.) You will be asked to include specific examples of positive and/or negative contributions and offer concrete suggestions for improvement.

4. Final Project Presentation in Class:

Each project team will make a presentation in class. You should distribute background material (hard copy or electronic) to the class and the professor at least 24 hours before your presentation. At that time, you should also furnish the professor with copies of any slides you will be showing in class.

Time for presentations will be limited. (Expect about 15 minutes to present and 5-10 minutes for Q&A. Once I know the number of groups, I will provide more details on how much time you will have for your presentation.) Hence, your background materials should give class members an adequate understanding of the organization and context your team has looked at, so that your presentation can focus on the main conclusions of your project.

Note: All class members should read these background materials in advance. There will be time for questions to team members and for general discussion of each project, providing opportunities for class participation by all class members during each session, not just the presenters.

After teams have submitted their project summaries, I will try to group projects together to create a theme for each day of presentations. I will determine randomly the date for each team’s presentation; rest assured that if your team is required to present on one of the earlier dates, I will take this into account in my grading.

5. Final Project Write-Up:
E-mail your final project to Professor Baron as a PDF file. Include an executive summary, the body of the report, and, if you wish, supporting appendices. Content is the primary consideration in grading the projects, but organization, style, succinctness, and coherent exposition do matter. I advise you to proofread the report carefully and not just slap together prose sections that team members have written individually.

6. Second Peer Assessments:

You'll use the peer feedback tool to give feedback to your team members, assessing their contributions to the group throughout the project. This final assessment will include a quantitative summary measure, which will be used in calculating the portion of the project grade reflecting peer feedback (see below). It's up to you whether to keep your feedback anonymous.

7. Other requirements:

Your group is encouraged to meet with me at least twice: once before the project update (2/22) and once afterward. I also am more than happy to meet before your team submits its project proposal. My aim in meeting is to offer guidance in formulating your project and preparing your presentation and paper, including possible topics and study sites, relevant literature, dealing with your client, and managing the project and team dynamics. I advise you to schedule meetings far in advance.

Project Management

Implementing thorough and rigorous project management will leave you and your teammates, your client, and me all happier with both the process and final result of your project. Summarize how you plan to do this in your initial project proposal description (due 2/8) and in your written update (due 2/22). At a minimum, you should utilize two templates (and include them in all project updates submitted to me):

1) A Gantt chart is a tool for planning and tracking specific project elements; assigning responsibility for specific elements; and tracking interdependencies among various project components. If you are not familiar with this, you can find plenty of information online. They usually look something like:

![Gantt chart example](image)

2) A table or template for organizing the issues, hypotheses, and data you will be examining. It might look something like this purely illustrative example:

<table>
<thead>
<tr>
<th>Hypothesis or Major Issue</th>
<th>Key Question(s) to Examine</th>
<th>Analysis Required</th>
<th>Final Results to be Obtained</th>
<th>Data/Sources Required</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
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</tbody>
</table>

![Table example](image)
| Rapid growth has eroded ABC’s founding culture | How have ABC’s, structure, HR system, and the values and demographics of its workforce changed over time? | Hiring, retention, and turnover patterns; document changes in espoused and enacted culture | • Charts/tables comparing value profiles of senior leadership and workforce over time  
• Tables summarizing climate surveys, turnover trends, etc.  
• Recommended changes  
• Interview founders and early hires; interview current leadership and current employees  
• Climate surveys over time  
• Data on workforce characteristics and trends over time |
|---|---|---|---|
| ABC’s HR system does not support innovation and collaboration | How does ABC measure innovation and collaboration? | Innovation and collaboration metrics over time and by subunit | • Summary charts, graphs, tables  
• Recommended changes  
• Information on company metrics (accounting, HR, R&D, etc.)  
• Benchmark data on competitors |
| How do ABC’s various HR “levers” relate to key success factors (KSFs) of innovation and collaboration | HR audit | • Template relating HR levers to KSFs  
• Recommended changes  
• HR documents and policies  
• Interviews or survey data from line employees |

### Grading of Projects

Project grades will reflect two components: (1) my assessment of your team’s work; and (2) a peer assessment component. One reason for using peer feedback in evaluating the team projects is to try and replicate the conditions of a real consulting team, so that you will approach the team project in the same manner.

When your team submits its project proposal (see above), you must specify what fraction of the project grade---between 20% and 100%---will reflect peer assessments. This percentage must be the same for every team member and cannot be changed once your team submits this to me.

#### Professor Evaluation Component:

I will assign a score to each project, from 0 to 100, reflecting my assessment of three factors:

1. Project execution, which includes:
   a. difficulty and significance of the topic(s) tackled
   b. rigor and thoroughness with which the issues are examined
   c. supporting conclusions with empirical data and/or course concepts
   d. clarity and succinctness in exposition
   e. identifying practical implications that follow from the analysis
   f. managing deadlines and client relationships
2. Quality of in-class presentation (and any materials distributed or used in the presentation)
3. Team dynamics, including quality of peer feedback

#### Peer Evaluation Component:

As part of the second peer assessment for the project teams (due May 13---see above), you will assign a numerical summary score from 1 to 10 to each team member, including yourself, reflecting your overall evaluation of that person’s contributions to the project. For each team member, I will discard the lowest and highest score received and average the remaining scores.

#### Total Project Grade:

The final project grade will combine my assessment (equal for all team members) and your teammates’ peer assessments. I will assign “peer feedback” points in proportion to each team member’s average assessment by the team.
Specifically, for the purists among you, the overall project grade for the \( i \)-th student equals:

\[
G_i = [(1-p) \times T] + [(Np) \times T \times \frac{\sum_{i=1}^{N} \bar{X}_i}{\sum_{i=1}^{N} \bar{X}_i}],
\]

where: \( G_i \) is the total project grade (0 to 100); \( T \) is the professor evaluation of the group’s performance (from 0 to 100); \( N \) is the number of students on the team (between 3 and 5); \( p \) is the percentage of the grade to be based on peer assessments (from 20 to 100);

\( \bar{X}_i \)

is the \( i \)-th student’s average peer ranking (between 1 and 10) from teammates, after discarding the highest or lowest ranking he/she received; and

\[
\sum_{i=1}^{N} \bar{X}_i
\]

is the sum of the average peer rankings among all team members (again, after discarding high and low values).

For non-purists, here’s a numerical illustration for a hypothetical team:

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Weighting</th>
<th>Teacher Score</th>
<th>Rating</th>
<th>Average Rating</th>
<th>Percentage of Team Total</th>
<th>Project Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groupcho</td>
<td>60%</td>
<td>75</td>
<td>10</td>
<td>7</td>
<td>6</td>
<td>30.88</td>
</tr>
<tr>
<td>Chico</td>
<td>60%</td>
<td>75</td>
<td>10</td>
<td>6</td>
<td>7</td>
<td>29.41</td>
</tr>
<tr>
<td>Zeppe</td>
<td>60%</td>
<td>75</td>
<td>4</td>
<td>5</td>
<td>1</td>
<td>17.65</td>
</tr>
<tr>
<td>Guarro</td>
<td>60%</td>
<td>75</td>
<td>10</td>
<td>5</td>
<td>9</td>
<td>35.29</td>
</tr>
<tr>
<td>Harpo</td>
<td>60%</td>
<td>75</td>
<td>10</td>
<td>5</td>
<td>10</td>
<td>36.76</td>
</tr>
</tbody>
</table>

Note: Should you be tempted to collude in peer evaluations, bear in mind that I will see the feedback provided by all team members and take it into account in my own assessment of your class participation, which represents 30% of the final course grade.

Research Sources

Obviously, it will be hard to learn much from this project or get high-quality and detailed information without getting inside the organization(s) of interest. Personal contacts can be extremely helpful for these purposes, and you might wish to consult the SOM Alumni Directory for names of alumni employed in this area in specific industries, because alumni are generally quite willing to be helpful to current students. Once you’ve gained access to one or more informants inside the organization of interest, you may be able to request copies of documents and reports (e.g., sample performance appraisal forms, employee handbook, data on workforce composition, etc.) that will be helpful in compiling your report.

You should also take advantage of other sources of background information on the firm, industry, and/or specific HR practices you are looking at. Some of the other sources you might wish to consult include:


(b) Academic Journals. If you are examining a specific subject (e.g., gain-sharing, training, teams, performance appraisal), you might wish to consult articles dealing with that subject in scholarly journals. Again, library staff can assist you with conducting computerized searches of journals in management, industrial relations, economics, psychology, sociology, and other relevant areas.

(c) Trade Publications, Annual Reports, etc.

(d) Government Statistics and Industry Studies (e.g., Monthly Labor Review, Census of Population, Bureau of Labor Statistics wage surveys and special reports on particular topics and industries, etc.). The Government Documents and Information Center in Mudd Library (38 Mansfield Street) has an extensive collection of State and Federal governmental reports.

(f) The Internet.

Confidentiality

In doing this project, please remember that you are representing SOM. You should treat all material gathered from organizations as confidential,
and you should not share it with anyone other than people on your team. Many enterprises regard their HR policies as among the most sensitive and proprietary information they possess. You should treat all aspects of this assignment with the same sort of client confidentiality and privilege as you would if you were doing this project while working for an outside consulting firm. If the client desires, you should feel free to disguise its name and those of any employees. If you need me to provide a letter or phone call to confirm that you are working on a legitimate course project and that the information will be kept in confidence, I will be happy to do so.

The instructor reserves the right to modify and/or change the course syllabus as needed during the course.