



# **TANGLEWOOD CASEBOOK**

**for use with**

# **STAFFING ORGANIZATIONS**



***8<sup>th</sup> Ed.***

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## TANGLEWOOD CASEBOOK

To accompany *Staffing Organizations, eighth edition, 2015*.

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# INTRODUCTION TO THE CASE CONCEPT

## *Rationale for the Tanglewood Case*

Many of the most important lessons in business education involve learning how to place academic concepts in a work setting. For applied topics, like staffing, learning how concepts are applied in the world of work also allows us see how the course is relevant to our own lives. The use of these cases will serve as a bridge between the major themes in the textbook *Staffing Organizations* and the problems faced by managers on a daily basis.

The Tanglewood case is closely intertwined with textbook concepts. Most assignments in the case require reference to specific tables and examples in the book. After completing these cases, you will be much more able to understand and apply the material in the textbook.

With this in mind, it should be noted that the cases are designed to correspond with the types of information found in work environments. This means that for many important decisions, the right answers will not always be easy to detect, there will be more than one correct solution, and often the very information that would make decisions easy is missing. Remember that ambiguity in any case corresponds to reality; although it may be frustrating at first, you should remember that business problems are themselves often confusing and require important judgment calls that don't have any single "right" answer.

## *Successful Case Performance*

A major component of the case method is learning how to apply and communicate classroom knowledge in a realistic setting. Each case should be prepared in the form of a report to be given to the top management team at Tanglewood department stores. The following guidelines for successful case performance are useful for checking your work:

1. Are responses and recommendations grounded in good management practice?
  - a. All responses need to incorporate what you're learning in the textbook effectively and accurately. Show mastery of all relevant concepts.
  - b. Recommendations should be directly related to best practices described in the textbook, and make effective use of the information provided in the case.
  - c. Recommendation should take potential problems into account based on what you've read, and incorporate methods to respond to these issues.
2. Does the report communicate effectively?
  - a. Avoid grammatical errors and confusing sentences.
  - b. Break the text into clearly marked subheadings so it is easy for the reader to find relevant information.
  - c. Explain technical concepts and statistics in a way that an intelligent reader who is not familiar with them could understand what is being reported.
  - d. Present tables cleanly with relevant information highlighted for the reader.
  - e. Explain *why* you chose to use information and data in the way that you did.

# CASE ONE: TANGLEWOOD STORES AND STAFFING STRATEGY

## *Section Objectives*

The goal of this section is to help you learn more about the basic environmental concerns the Tanglewood Department Store chain is facing. This information will help you to understand how competition, strategy, and culture jointly inform the effective development of a selection plan.

## *Organization Overview and Mission*

Tanglewood is a chain of general retail stores featuring items such as clothing, appliances, electronics, and home decor. The company operates in the moderate price niche, targeting middle- and upper-income customers. Tanglewood's strategic distinction is an "outdoors" theme, with a large camping and outdoor living section in every store. The store also distinguishes itself by its simple, elegant, and uncluttered design concepts for the store and their in-house products. The company's mission statement is:

***Tanglewood will be the best department store for customers seeking quality, durability, and value for all aspects of their active lives. We are committed as a company to providing maximum value to our customers, shareholders, and employees. We will accomplish this goal by adhering to the core values of responsible financial management, clear and honest communication, and always keeping performance and customer service in the forefront.***

Tanglewood was originally founded in 1975 by best friends Tanner Emerson and Thurston Wood. The initial concept was a single store in Spokane Washington, named TannerWood, which sold a combination of outdoor clothing and equipment that the pair had designed themselves. The employee handbook notes that, "Tanner and Thurston financed their early store plans with credit cards and personal loans from friends and family. They had so little money that they slept in sleeping bags in the back room and put every penny they made back into the stores." The first store's unique merchandise offering and personable sales staff made them successful quite rapidly, allowing Emerson and Wood to move out of the back room and add several more stores during the late 1970's. The merchandise offerings expanded over time to incorporate more conventional retail items, while still retaining the elegant, yet outdoors look for the stores overall.

Emerson and Wood eventually decided to rename their store chain Tanglewood in 1984. Much more rapid growth began around this time. As Emerson put it, "we worried for a long time that expanding would compromise our vision of a small, personable shopping experience. We had always wanted to run the type of store that we would love to work and shop at. Around 1984, after we had 10 stores, we realized we had developed a fairly successful blueprint for running stores with a strong base of employee participation,

customer satisfaction, and profitability. So we decided to spread out to cover the northwest.”

During the 1990’s the expansion strategy really took root. Most of the expansion occurred by purchasing other existing stores rather than building new stores. Emerson and Wood had been heavily involved in the management of the stores, but found that increasingly the corporate administration was a more pressing concern. The company arrived at a regional structure for its operations. Emerson and Wood took on the positions of CEO and President of the company, respectively, while a team of regional managers more directly oversee day to day operations. The company currently has a total of 243 stores open in the states of Washington, Oregon, Northern California, Idaho, Montana, Wyoming, Colorado, Utah, Nevada, New Mexico, and Arizona.

Prior to any further expansion, however, the company needs to consolidate its current management strategy. The process of growth has been very quick in the last 5 years, and has involved buyouts of several smaller chains of department stores. While all the stores under the Tanglewood name have the same basic look, the management styles and human resource (HR) practices still reflect the historical differences between stores. Wood noted in a recent interview with Business Monthly, “Tanglewood really needs to slow down and take a hard look at our corporate culture. Right now, we need to consolidate and make sure we’re as close to the company’s original mission as we can be. Our success is due entirely to our strong culture—this is something we need to hold on to.” These concerns have lead Tanglewood to bring in external human resources consultants like you to help centralize the organization’s practices.

The brick-and-mortar stores have been extensively expanded through the use of an online order portal, starting in the early 2000’s. The emerging plan for Tanglewood has been to continue to offer both the online and in-store experience, while maintaining a focus on their physical store locations as a competitive advantage. Because the company has always emphasized customer service, and they have found that in-store sales tend to generate longer-term revenue streams as customers form personal relationships with expert salespeople, online sales are a supplement to, but not a replacement for the in-store experience. Tanglewood does offer extensive in-store pickup options and assistance for any customer who purchases items online. In-store returns with immediate replacement for most items are also allowed, even if the items were purchased online. Because online sales are not considered a core area of competitive advantage for Tanglewood, the day-to-day administration of the online sales function was outsourced several years ago.

Another major concern for Tanglewood has been the westward expansion of companies like Kohl’s and Target. The possibility of more direct competition has lead Tanglewood to critically examine their HR policies and practices. For staffing, in particular, the organization feels there absolutely must be a workforce of committed, qualified individuals who will help carry the Tanglewood philosophy into the future.

## Competition and Industry<sup>1</sup>

The Tanglewood Department Store chain operates in the nondurable general retail industry, which fits into industry 45211 as classified by the North American Industry Classification System (NAICS). This industry engages in the sale of consumer goods including clothing, small appliances, electronics, and other housewares. The retail industry accounts for over \$4 trillion in annual sales. Recent estimates indicate that the retail industry employs approximately 15 million people.

A comparison of several top retail stores and outlets is presented below. Note that although LL Bean has few physical stores and none in the areas where Tanglewood operates, it is a direct competitor in terms of products offered. The operating revenues indicate total sales for these organizations, and the growth rate tracks changes in the sales for each retail chain. The financials show that Tanglewood is a moderately sized organization with solid growth potential.

	Operating Revenues (in millions)	Revenue Growth (36 month)	Employment (in 1,000s)	Employment Growth (36 month)	Number of Stores
Dillard's	6,692	7.01%	40	2.83%	302
J.C. Penny	12,985	(26.0%)	116	(27.04%)	1,100
Kohl's	19,031	1.21%	137	0.74%	1,150
LL Bean	1,521	1.40%	5	8.70%	30
Macy's	27,931	11.71%	173	3.92%	840
REI	2,000	20.5%	10	10.76%	132
Ross Stores	10,230	30.1%	66	33.94%	1,200
<b>Tanglewood</b>	<b>7,200</b>	<b>13.1%</b>	<b>53</b>	<b>6.75%</b>	<b>243</b>
Target	72,596	7.73%	366	3.10%	1,900

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<sup>1</sup>Information on the retail industry is adapted from Hoover's, (<http://www.hoovers.com/subscribe/>) and company financial statements.

## ***Competitive Response and Strategy***

The company's specific niche is similar to that occupied by Kohl's or Target, appealing to middle- and upper-income consumers looking for convenience and reasonable prices. This means that Tanglewood uses a layout and provides the same products offered of general merchandise retailers. Tanglewood also focuses on stocking quality products, providing customer service, and a more designer appearance than discount stores. This strategy is further supplemented by the company's trademark "look" which involves an outdoors theme, complete with real wood décor and use of natural colors.

Like its competitors, Tanglewood has developed several proprietary brands of merchandise which are designed to complement its look. While the actual products are made by subcontractors, Emerson and Wood have personal responsibility for all products that are produced. Their own brands include Burford Kitchen, which includes wood-accented, rustic, sturdy kitchen utensils, and Wilderness Outfitter clothing and camping goods lines. The stores also have emphasized small home electronics, housewares, and bedding accessories.

Despite the company's effort to emphasize its western appearance and theme, there is no shortage of high-technology innovations in the way that Tanglewood operates. As noted previously, they have worked hard to ensure that their web portals provide a clear guide to merchandise available in the stores. Through their "County Store" concept they have also made their stores a pick-up location for items ordered online. This allows them to utilize their low-cost shipping arrangements to the benefit of customers. Emerson notes, "We have a lot of consumers in places like rural Idaho, who don't want to drive an hour to one of our stores and then find out what they wanted isn't available. The online County Store makes sure that if they want something, we will have it in stock." In addition, online shoppers who visit bricks-and-mortar locations also often buy other merchandise in the stores.

## ***Organizational Structure***

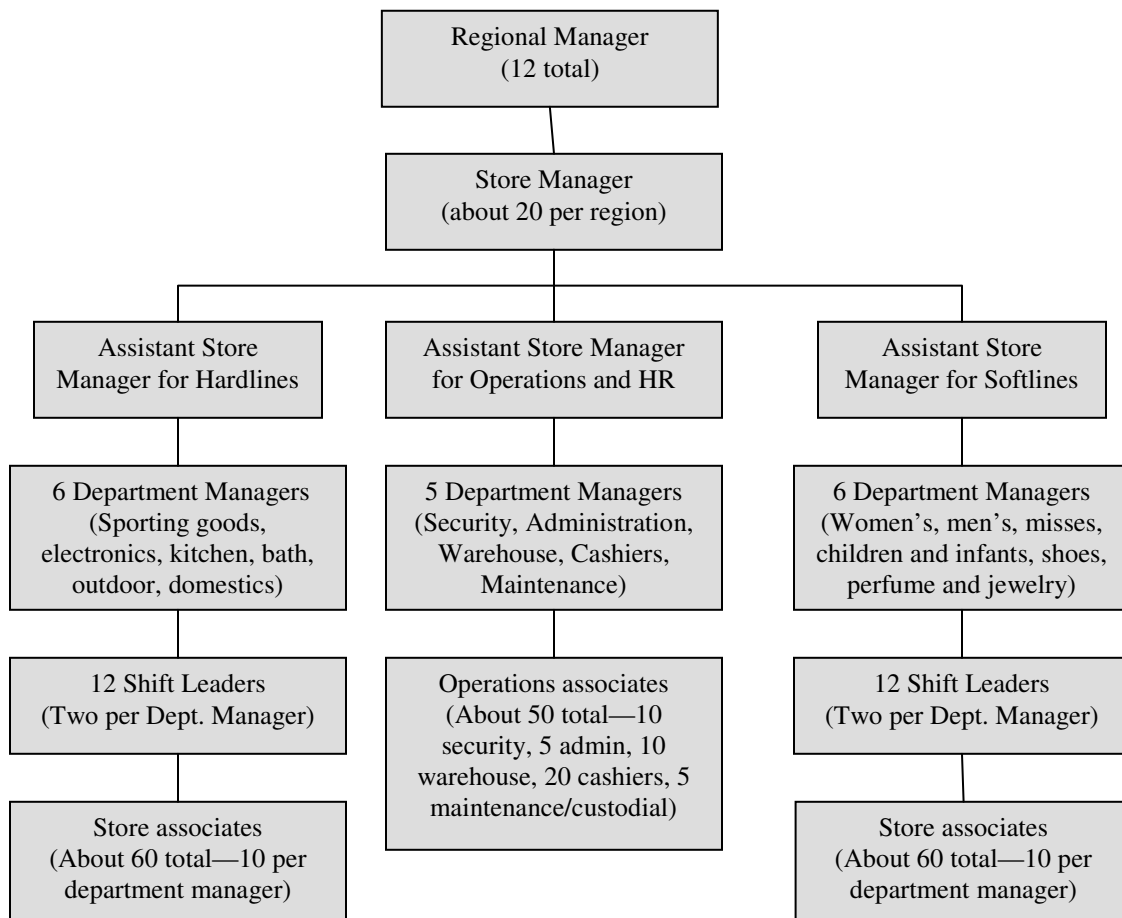
The structure of most retail stores is relatively similar, and Tanglewood has essentially evolved to have a structure that looks something like the familiar organizational hierarchy. This appearance is deceptive, because employees at all levels of the corporation are encouraged to make suggestions regarding operations. More than one major operational change has come from an employee suggestion.

Each store is managed by a single individual who has three assistant store managers working beneath him or her. The Assistant Manager for Softlines is in charge of all areas related to clothing and jewelry. The Assistant Manager for Hardlines is in charge of all non-clothing merchandise, including sporting goods, bath, bedding, and home decor. Another way to think of the distinction is that Softlines consists only of things that are worn, while Hardlines consists of nothing that is worn. The Assistant Manager for Operations and Human Resources is primarily responsible for activities, including



security, clerical work, merchandise loading and warehousing, cashiers, and human resources management. Although the Assistant Manager for Operations is technically in charge of the smallest number of employees, this tends to be a more powerful position because it includes more managerial responsibilities, including staffing the store and training new hires. Department managers are in charge of specific product groups such as electronics, women’s clothing, or shoes. For each shift there is also a designated shift leader who completes most of the same tasks as store associates, but also has some administrative responsibility.

Overall, with 1 store manager, 3 assistant managers, 17 department managers, approximately 24 shift leaders, and approximately 170 associates, there are around 215 employees per store. All employees, full or part time, are members of the core work force. Tanglewood does not extensively use a flexible workforce, such as temporary employees. A core workforce is viewed as essential for the organizational values and culture, described below, that Tanglewood seeks to develop and maintain.



Stores are organized into 12 geographical regions, with approximately 20 stores per region. Each region has a regional manager who oversees operations of the stores. The store managers report directly to the regional managers. There is considerable variation

between regional managers in how they run their HR practices. The tendency for some regional managers to encourage human resources practices which are counter to the Tanglewood philosophy is a major reason that an external consulting firm was brought in to centralize human resources.

The breakdown of stores and employment by division is as follows:

Division	Area Covered	Stores	PCs	PCs/S	Employees
1	Eastern Washington	25	3,120,000	124,800	5,400
2	Western Washington	25	3,011,000	120,440	5,400
3	Northern Oregon	18	1,850,000	102,778	3,900
4	Southern Oregon	16	1,710,000	106,875	3,400
5	Northern California	23	3,000,000	130,435	4,900
6	Idaho	17	1,366,000	80,353	3,700
7	Montana and Wyoming	18	1,418,000	78,778	3,900
8	Colorado	23	4,550,000	197,826	4,900
9	Utah	19	2,351,000	123,737	4,100
10	Nevada	19	2,241,000	117,947	4,100
11	New Mexico	18	1,875,000	104,167	3,900
12	Arizona	22	5,580,000	253,636	4,700
	Total	243			52,300

*Note: PCs is the population of the area covered; the abbreviation PC for Tanglewood means "potential customers." The PCs/S is the number of potential customers per store. Employee figures are rounded to the nearest hundred.*

### ***Organizational Culture and Values***

Whereas many elements of the Tanglewood operational plan have been based on other firms within the retail industry, the company's culture and values are distinct from most of its major competitors. From its inception, this company has emphasized employee participation and teams. At orientation, every employee hears the philosophy that Wood and Emerson proclaimed as their vision for employee relations, "If you tell someone exactly what to do, you're only getting half an employee. If you give someone the space to make their own decisions, you're getting a whole person."

Most retail stores have a strict hierarchy with assistant store managers providing directives to their subordinates, and most associates' primarily follow orders. Tanglewood, on the other hand, has allowed each department manager to formulate distinct methods for running their departments in coordination with the employees they supervise. There is still a well-defined ordering of job responsibilities, but efforts are made to involve employees in the decision process when possible.

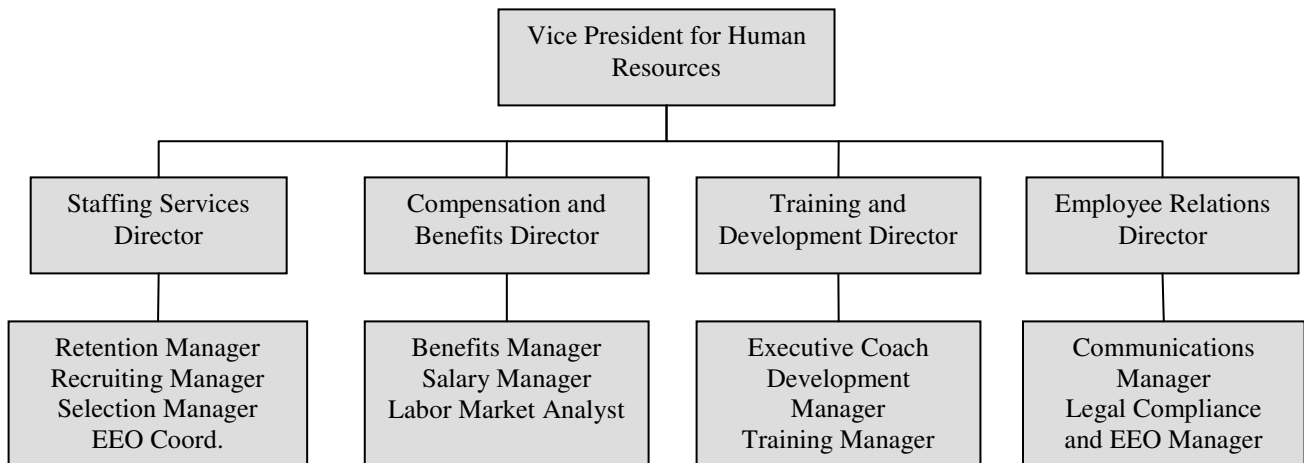
One of the most important cultural elements of the organization is an emphasis on "straight talk" in all areas of the business. The company provides employees with

information on the company’s share price and overall profitability for each quarter, along with other details about company activities. Profit-sharing for all employees is part of the company’s push to encourage employees to think like managers. In addition, mandatory weekly store meetings (one meeting for each shift) give employees a specific time to voice their suggestions for in-store improvements. Associates who make suggestions that are implemented by management receive financial bonuses. Department managers are also given financial incentives for successfully developing and implementing new policies and procedures, further reinforcing the participatory management style of the company.

Every shift is run based on a team concept. While the most senior associate is designated as a shift leader, the other members of the team are encouraged to provide ongoing suggestions. All employees share all tasks, so there are no designated “customer contact” or “display” employees. It is also expected that associates will make themselves available to help the other members of the team. Quarterly performance evaluations include several items specifically reflecting the associates’ interactions with other team members and initiative to improve the department.

Because of the heavy emphasis on employee suggestions, Tanglewood’s upper managers have ample opportunity to observe the leadership and decision making qualities of their associates. This is one of the main portals through which promotion and advancement are achieved. All new employees without retail experience, even those with college degrees who are targeted as having management potential, spend a period of time working in the store as an associate. This is seen as a way of preserving the company’s unique culture and values over time.

***Human Resources at Tanglewood***



The basic structure for human resources at Tanglewood involves both corporate and store-level components. The corporate Staffing Services function, shown above, is a division of the Human Resources Department. The Staffing Services Director supervises

three managers (for the areas of retention, recruiting, and selection), plus an Equal Employment Opportunity Coordinator. The corporate Staffing Services function performs data analysis and design of staffing policies and programs. Data regarding recruiting practices, methods for interviewing, testing and selecting employees, and employee turnover are sent from the individual store to the corporate headquarters. At headquarters, the data are collected and statistically analyzed. Based on these analyses, specific recommendations are provided to the stores. For example, after data suggested that newspaper advertising for new recruits was becoming less and less cost effective, all stores were given a strong recommendation to switch to an internet-based strategy. As another example, the employee selection specialists in the corporate staffing function developed a format for interviews that is now used as a part of the hiring process for nearly all stores.

Each store is responsible for implementing recommendations provided by corporate. The store operations and human resources manager is responsible for overseeing each store's staffing, training, performance management, and equal employment opportunity practices. As pertains to staffing, the manager of operations and human resources is responsible for planning, recruitment, and initial screening. Department managers interview finalists, then hiring decisions are made in conjunction with the assistant store managers. Promotion decisions up to the department manager level are made within the stores. Regional managers conduct the hiring for store managers, and work with each store's managers to determine promotions to the assistant store manager.

Historically, the corporate staffing function has not been strong. Because of the participatory philosophy of the stores, the role of corporate HR was primarily to act as an advisor to each regional manager. The company's plans for expansion have led to a change in this philosophy of late. Emerson's directive to HR for this year is, "help us to develop a plan, a way of using all our human assets in the service of our philosophy, our customers, and our employees." As the company expands, the need for a central planning body in staffing is seen as an important way to maintain the distinctive "flavor" of the Tanglewood experience. In addition, the sheer number of stores means that local leadership is becoming inefficient. Centralization will also serve to create staffing operations efficiencies.

### ***Your role***

Your role within Tanglewood is as an external consultant for staffing services. You will report directly to Daryl Perrone, who is the Staffing Services Director, with final oversight for your work coming from Marilyn Gonzalez, who is the Vice President for Human Resources. Both of these individuals were recently hired personally by Emerson and Wood as part of their plan to centralize and improve the human resources function. Perrone has extensive experience in managing staffing for department stores in New Jersey and New York, while Gonzalez has worked in a variety of corporate positions in the Pacific Northwest.

The reports that you produce will be given to Perrone and Gonzalez, who will disseminate them throughout the organization. As such, although Perrone, Gonzalez, and other members of the human resources team are generally well versed in the terminology of staffing, the other individuals who read your reports will not be so familiar with the specific staffing terminology. This means that your reports should not contain excessive staffing terminology, and that when you do use specific staffing terms you should provide a brief explanation.

*Specific Assignment Details*

See Compass.

## CASE TWO: PLANNING

### *Section Objectives*

The planning process in staffing involves making forecasts of an organization's future hiring needs and developing methods the organization can use to meet these needs. The process of planning involves a combination of forecasting labor needs, comparing these needs to the labor availabilities, and determining where gaps exist. After these gaps are identified, general plans for filling these gaps are enacted.

Beyond the process of developing objectives for the number of individuals to be hired, planning activities often take the demographic composition of the workforce into consideration. Attending to the demographic breakdown of the workforce is important for a number of reasons. One is to ensure that the company has employees who can understand the perspective of the populations the company serves. The second reason is to minimize concerns about Equal Employment Opportunity violations<sup>2</sup>. For both purposes, the current workforce can be compared to the demographic characteristics of other individuals who work in similar jobs.

### *Planning for the State of Washington: Forecasting Requirements and Availabilities*

The Staffing Services Director, Daryl Perrone, has requested your assistance in the completion of an HR planning analysis for the 50 stores in two regional divisions in the state of Washington. After these overall goals are developed for the state, the policy will be disseminated across all 50 individual stores. Data from the individual stores will then be sent to the corporate offices for analysis and re-evaluation.

The basic model for planning includes (1) forecasting labor requirements, (2) forecasting labor availabilities, (3) conducting environmental scans, (4) determining gaps, and (5) developing action plans. These steps are described in your textbook. Conducting an adequate human resources selection plan will require you to take all of these steps.

Historical data from these two divisions have been presented in the transition probability matrix. Information on how to read transition matrices is provided in your textbook. The transition probability matrix was developed based on the historical staffing pattern for Washington over the past five years. A first stage of investigating staffing is to use the previous years' staffing patterns as a preliminary forecast of labor requirements, the internal availability based on retention, internal promotions, transfers and demotions, and a determination of gaps by subtracting forecasted availabilities from future requirements.

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<sup>2</sup> It is important to note that a discrepancy between the current workforce and the available workforce is not sufficient to demonstrate an EEO violation.

**Table 1.1 Markov Analysis Information**

Transition probability matrix		Current year					Exit
		(1)	(2)	(3)	(4)	(5)	
Previous year	(1) Store associate	0.53	0.06	0.00	0.00	0.00	0.41
	(2) Shift leader	0.00	0.50	0.16	0.00	0.00	0.34
	(3) Department manager	0.00	0.00	0.58	0.12	0.00	0.30
	(4) Assistant store manager	0.00	0.00	0.06	0.46	0.08	0.40
	(5) Store manager	0.00	0.00	0.00	0.00	0.66	0.34

Forecast of availabilities		Next year (projected)					Exit	
		(1)	(2)	(3)	(4)	(5)		
Previous year	(1) Store associate	8,500	4505	510	0	0	0	3485
	(2) Shift leader	1,200	0					
	(3) Department manager	850	0					
	(4) Assistant store manager	150	0					
	(5) Store manager	50	0					

Gap analysis		Next year (projected)				
		(1)	(2)	(3)	(4)	(5)
Year end total (column sum)		4505				
External hires needed (current workforce-total)		3995				

**Forecasting Labor Requirements**

The Washington market is very stable for Tanglewood. Most stores have been in existence for 10 or more years, and were indirectly managed by either Emerson or Wood when they were first established. Because of this stability, the estimate for the coming year’s labor requirements is identical to the current year. So, for example, they currently have 1,200 individuals working as shift leader, and expect to need 1,200 individuals to work as shift leaders for the coming year as well.

**Forecasting Labor Availabilities**

One primary source of information for immediate labor availability at Tanglewood is their internal labor market. Table 1.1 shows that Tanglewood has used internal promotions to fill many openings for the department manager, assistant store manager, and store manager positions. For example, it is projected that 16% of shift leaders will be promoted to the rank of department manager, 12% of department managers will be promoted to be assistant store managers, and 8% of assistant store managers will be promoted to be store managers. However, it also appears that there will need to be considerable external hiring as well, since only 46%-66% of employees stay in the same position over a one year period.

To estimate a labor forecast, the proportion (percentage) of individuals for the next year is multiplied by the current workforce number. For the shift leader, there are 1,200



individuals in the position, of which, 50% will remain for the next year. This means that the projected availability is  $1,200 \times 50\% = 600$ . Similarly, 16% of the shift leaders will be promoted to be department managers, so  $1,200 \times 16\% = 192$ .

### **Conducting Environmental Scans**

The environment for staffing managerial employees at Tanglewood in the state of Washington is fairly complex. Externally, there is a consistent supply of qualified individuals in the urban markets of Seattle and Spokane. Individuals from these urban areas often are transferred to small towns as they move up the promotion chain. However, retail is often seen as an undesirable market for recent college graduates. Many know of retail work experience, and see it (partially correctly) as requiring long hours, low pay, and frequent conflict with lower-level employees. While these factors lessen as individuals move up the hierarchy, many individuals are reluctant to put in several years in the shift leader and department manager positions to be promoted.

The labor market in the Pacific Northwest has been relatively “soft” in recent years, meaning that unemployment rates are high and it is usually difficult for individuals to find new jobs. This weakness in the labor market has made it somewhat easier for Tanglewood to find new candidates for the managerial positions, but recent forecasts suggest that expansion in the professional and managerial sectors of the labor market may reduce the number of individuals available for these jobs.

Internally, Tanglewood has relied on its experienced employees as a major source of talent. As noted earlier, the company promotes extensively from within. As a result, managerial employees often have significant experience with the company’s social environment and culture. This internal staffing strategy is seen as a real strength for the company, because the possibility of being promoted is believed to increase retention of lower level employees.

### **Determining Gaps**

The current focus of staffing is to fill the vacant positions, although the organization would like to take steps to reduce the turnover rate for many of these jobs as well. During the planning phase targets are set for the number of individuals who need to be hired. The process of turning these estimates into actual employees will be covered in the recruiting phase. There are 1,200 shift leaders currently, so if 600 individuals stay, Tanglewood will need to hire 600 more. The calculation of gaps is demonstrated in Exhibit 3.9 in the textbook; refer to this when you are determining gaps for Tanglewood.

### **Developing Action Plans**

Having developed a picture of the number of individuals Tanglewood will need to fill their positions in the coming year, there are several important decisions to be made regarding how to fill these gaps. The company’s philosophy for filling vacancies is a combination of tactics. Tanglewood has one managerial track that promotes sales

associates to be shift leaders, then promotes shift leaders to be department managers, and so on up the managerial hierarchy. An alternative managerial track is bringing in either recent college graduates or individuals who have extensive experience in another store chain directly into the assistant store managerial position.

Regardless of where employees come from, the corporate staffing function endorses a strong commitment to developing long-range relationships with its workers. Many employees initially have difficulty adapting to the unique culture of Tanglewood, so the company is not happy to see experienced employees who have been socialized leave. There are also concerns that having too many employees come and go will dilute the company's strong culture.

There are reasons why the company may consider alternative perspectives on the employment relationship in the near future. First, fluctuations in the economy have meant that the company carries excess employees during some periods of the year, and has a deficit of employees during other periods. There is some seasonal hiring for store associates (e.g., hiring temporary employees for the holiday season in December), but the managerial workforce numbers are typically fixed. Second, to preserve the company's culture, some have suggested having all new managerial employees spend at least a little time in the Washington stores to get a sense of how the stores originally worked. These assignments would be short term in nature and would probably require a more contingent outlook for the employees they supervise.

### ***Representation Concerns for the Flagship Store in Spokane***

The problem of selection planning is made considerably more complex because of Equal Employment Opportunity (EEO) requirements that fall on organizations that do business with the federal government. Because several Tanglewood locations are near military bases or government offices which have expense accounts for general merchandise items at Tanglewood, all staffing must be done consistent with the OFCCP affirmative action requirements. In the current case, Tanglewood needs to use information from their staffing records to examine whether the company has a disparity in outcomes for different groups of employees. When the proportion of protected classes being hired or currently employed falls below the proportion in the labor market, this may indicate intentional or unintentional discrimination in hiring and promotions that will need to be addressed through affirmative action planning. There are also growing concerns within the organization that a combination of rapid growth and high turnover threaten to create real problems in terms of the demographic breakdown of employees at the organization.

Acting as part of a team of staffing professionals, you have been asked to analyze the hiring and promotion activities of Tanglewood as they relate to the issue of disparate impact. The first level of disparate impact analyses for the purposes of OFCCP reporting and affirmative action planning are always done at the establishment level. An establishment, for Tanglewood, is a single store.

This analysis will concern the corporate flagship store in Spokane, Washington. This is the largest location within the Tanglewood chain and serves as an example for all other locations. The store has approximately 75% more employees than an average location, making for a total of 30 department managers, 42 shift leaders, and 300 store associates. There are five assistant store managers and one store manager. The primary concern for representation data is in the groups of department managers, shift leaders, and store associates.

To assess the problem of discrimination, data from the previous year's employees stocks in Spokane were assembled. The data on the next page are broken into two tables. The first shows the company's current employee availability data, and the second provides a template for comparing incumbency to availability.

Analyzing utilization of protected classes from the labor market requires comparing the availability of protected classes (i.e., the proportion of the available work force who are members of protected classes) to the utilization of protected classes (i.e., the proportion of those hired or employed who are members of protected classes) for each job. You can find additional information on this topic in your textbook.

In a stock analysis, data from EEO-1 reports conducted by the Equal Employment Opportunity Commission are used to determine how many people in a certain region are available to do the job (including those currently employed in similar jobs). The data for the current analysis comes from the job patterns for minorities and women in private industry tables, which were specifically designed by the government for the purpose of conducting EEO analyses. The most recent website for this information is below:

<http://www1.eeoc.gov/eeoc/statistics/employment/jobpat-eeo1/>

The appropriate data can be found through the following steps:

- 1) Go to the website above
- 2) Indicate that you want the most recent tables
- 3) Indicate that you want data for States, by NAICS-2
- 4) Indicate that you want data for Washington
- 5) Indicate that you will select the industry of Retail Trade
- 6) The appropriate table should be displayed.

Store associates and shift leaders are considered, for the present analysis, as sales workers, while department managers are first/mid-level officials and managers.

### ***The Procedure for Developing an Affirmative Action Plan***

Tanglewood's internal staffing policy as recently articulated from central management is to retain as close a correspondence between their current representation and the available workforce. The primary goal for this year is to focus attention on achieving better numbers for gender representation, but they would like to examine other demographic groups in the future.

The source for the external data in all cases is from the EEOC data described earlier. The source for internal data is the current workforce of the flagship store. To determine the availability for each job category, the raw statistics for percentage of female and minority *available* employees are multiplied by the value weight, and then these weighted statistics are added together within each job category. As such, the internal pool of potential shift leaders includes all current store associates, and the internal pool of potential department managers includes all shift leaders.

**Table 1.2 Determining Availability**

		Raw Availability Rate		Value weight	Weighted Statistics	
		Female	Minority		Female	Minority
Store associates	External	60.5%	24.8%	100%	60.5%	24.8%
Shift Leaders	Internal	55.7%	21.0%	92.4%	51.5%	19.4%
	External	60.5%	24.8%	7.6%	4.6%	1.9%
	Total				56.1%	21.3%
Department Manager	Internal	42.9%	16.7%	65.7%	28.2%	11.0%
	External	40.2%	18.2%	34.3%	13.8%	6.2%
	Total				42.0%	17.2%

The availability data are taken from Table 1.2 and then used for determining if some demographic groups are underrepresented in the workforce of the flagship store, and also for developing placement goals. A shortage exists if there is a discrepancy between the current workforce and the available workforce as calculated by the ratio of the current workforce divided by the available workforce. As shown in Exhibit 3.18 in your textbook, if the incumbency percent is below 80%, the organization is encouraged to establish a goal of moving their demographic representation in line with the available workforce. To estimate this proportion, the incumbency for females is divided by the availability for females, and the incumbency for minorities is divided by the availability for minorities.

**Table 1.3 Comparing Incumbency to Availability and Annual Placement Goals**

	Female Incumbency	Female Availability	Incumbency percent? Establish goal?	If Yes, Goal for Females	Minority Incumbency	Minority Availability	Incumbency percent? Establish goal?	If Yes, Goal for Minorities
Store associates	55.7%	60.5%	92.1%		22.3%	24.8%	90.0%	
Shift leaders	42.9%	56.1%	76.5%	56.1%	16.7%	21.3%	78.4%	21.3%
Department manager	30.0%	42.0%	71.4%	42.0%	16.7%	17.2%	97.1%	

*Specific Assignment Details*

See Compass.

# CASE THREE: RECRUITING

## *Case Objectives*

Recruiting is the first stage in which organizational plans for staffing come into contact with the labor market for employees. Before making any new recruiting effort, an organization needs to carefully consider the methods available and balance out the costs of each method with the organization's needs.

The recruiting case provides an opportunity to see how staffing managers develop plans for recruiting efforts. You will develop a recruiting strategy and a recruiting guide for the store associate job. The case also demonstrates how you can use organizational data to determine what the best methods for recruiting are. Finally, you will have an opportunity to develop various forms of recruiting messages that will encourage individuals to apply for jobs as sales associates at Tanglewood.

## *Primary Concerns Regarding Recruiting*

Like any retail organization, there is a constant need for new employees at Tanglewood because of turnover. In a typical year, approximately 50% of the sales associates will turnover. The process of recruiting is therefore of great concern for managers in the field. However, up to this point, the organization has not had any centralized method for recruiting new employees. As part of the consolidation across stores, Tanglewood is now encouraging a systematic review of their recruiting policies that will ultimately result in a better recruiting system for store associates.

Staffing services has made very few decisions regarding how recruiting should proceed. Each store has been encouraged to ensure that their recruiting methods attract a culturally and personally diverse group of applicants. Beyond this general directive from the corporate offices, however, there is not very much direction for stores regarding how they should be recruiting new store associates. Regional managers occasionally discuss ideas for how to recruit new employees, but as you will see, they have some very distinct methods for recruiting in practice.

## *Methods of Recruiting Available*

There are five primary methods of recruiting store associates used at Tanglewood in Washington and Oregon. For additional information regarding these sources of recruiting check your textbook, where advantages and disadvantages of each method are described in greater detail. All of the specific strategies for recruiting are supplemented with media-based and in-store solicitations for employment. The media-based strategy includes internet banner advertising, social media messages, and in-store signs informing patrons of potential job availability.

### *Applicant Initiated*

The most traditional method for recruiting used by Tanglewood is through applicant-initiated processes. Job applications are completed through either the internet or an automated telephone process. This allows interested individuals to apply without actually having to go into the stores. Paper applications are still available at stores as well. Media expenses are a combination of initially setting up a contact with a media outlet, developing an advertisement, and the price of processing materials and interviews for each applicant.

### *Referrals*

Employees are encouraged to refer their friends to apply for work at Tanglewood as well. The referral process is enhanced by providing current employees with \$100 for each friend they refer who is hired. Referral expenses are a combination of creating and maintaining records, the price of processing materials and interviews for each applicant, and the payment for each individual who is hired.

### *Kiosk*

An alternative method of recruiting that minimizes processing costs is to have a computerized kiosk in the main entrance to the stores. The kiosks look somewhat like ATM machines, and feature a fully functioning keyboard and touch-screens. Unlike media advertisements and internet applications, the kiosks provide opportunities for applicants to also briefly interact with store employees after they complete their materials. Because the entire application process is completed electronically and scored automatically, there is no material cost, although there is still an initial processing and interview cost. Each kiosk costs approximately \$40,000.

### *State Job Services*

In urban markets with higher pools of availability of unemployed individuals, state job services have also been used occasionally to find new applicants. The employment service is provided with a set of qualifications required for work, and the employment services agency assists in providing initial screening and hiring recommendations. Training is partially subsidized through tax incentives. In areas which have less centralized population, the job service option is less feasible. Essentially, the cost of the job service is for creating and maintaining an initial contact, with other costs being roughly half of those for traditional media sites.

### *Staffing Agency*

One method that has been explored recently is the use of an external staffing agency. Essentially, this is outsourcing the actual selection of candidates to StoreStaff, which is a large organization that specializes in locating workers for the retail industry. Many organizations use StoreStaff to find temporary employees, or provide trial employment to StoreStaff employees as part of a temporary-to-permanent arrangement, but for Tanglewood, individuals recruited through StoreStaff are directly hired as part of the core workforce. Because StoreStaff provides some training to their pool of candidates, they are less expensive to train, but the overhead costs of providing money to StoreStaff for locating and screening these candidates does make this method quite costly.

## *The Situation at Tanglewood – Four Regions, Four Recruitment Policies*

As noted in the introduction, decision making for staffing activities has recently become centralized within the staffing services division. A major question that arises as a result of this consolidation is how to determine which HR policies should be left in the hands of each individual location, and how much should be taken over by corporate HR. The recruiting function is of particular interest since there is such wide dispersion in how individuals are recruited. Data is available from the divisions in the form of numerical estimates of costs per individual processed, employee retention, performance on a pre-hire work-sample test which is given to all employees, and some informal interview data.

Tanglewood Department stores were first established in the western area of Washington and then moved southwards into Oregon, then spread eastwards into the Rocky Mountain States. Many of the policies implemented in the Western Washington locations were applied directly in the Rocky Mountain States. However, because the initial expansion was less well-coordinated, there is substantial variety in the staffing policies being followed in the stores in Washington and Oregon.

### *Western Washington (Region 1)*

It has historically been the largest and most profitable area, with a total of 25 stores in the region centered around Seattle. In fitting with the organization's founding philosophy, the stores in Western Washington are run largely autonomously. The current head of the Western Washington division advocates a philosophy of individual autonomy and empowerment. Generally this division has been viewed as highly committed to the core corporate culture, although this passion for the mission has sometimes meant paying less attention to careful management of financial concerns. Because of its size and the large amounts of financial resources available, leadership of this division has been one of the most powerful positions within the organization.

Western Washington uses a variety of recruiting methods. The primary methods of recruiting are referrals from current employees. In the Seattle area, the division also makes heavy use of job services. Over time traditional media methods of recruiting have been reduced, but are still used occasionally. Finally, to fill in those positions that are not met with the other three methods, the kiosk method is used.

### *Eastern Washington (Region 2)*

This was where the company began. The split of Washington into Eastern and Western divisions came early in the store's history, but their physical proximity and high overlap between management across the areas has led to very similar management styles. The Eastern Washington division is approximately the same size as Western Washington, with 25 total stores. However, with the exception of the area around Spokane, the majority of this area is much more rural.

To a large extent, the Eastern Washington division pioneered all the policies used by Western Washington, although the overall policies have been tempered by geographical



differences. The job service method has not been successfully implemented on a wide scale. Instead of using this method, this division uses more traditional media advertising.

*Northern Oregon (Region 3)*

Unlike Western Washington, there is a very different philosophy of operations in Northern Oregon. Northern Oregon has been run very “professionally” for years, with most decisions carefully weighed against their financial consequences. Administrative decision making is hierarchical, with specific tasks assigned at each level of the organization’s structure. The current top administrator for this area, Steven McDougal, has a reputation for being a technocrat, and has largely worked to maintain the system he inherited when he first took over five years ago. There are 18 stores in this region.

The recruiting methods of the Northern Oregon division fall into three major categories. The main methods are media and in-store kiosks. This division has also used staffing agencies lately. The division explicitly rejects the use of employee referrals, claiming that the use of signing bonuses leads to the hiring of unqualified individuals who are selected without sufficient qualifications due to favoritism.

*Southern Oregon (Region 4)*

Southern Oregon is unique among the areas within the Pacific Northwest in that it has remained relatively small, with only 16 stores in the division mostly concentrated in the Eugene area. However, there is also a growing push to increase concentration in Southern Oregon as a first step to establishing more stores in Northern California. This area is very innovative across the board in its human resources practices. The innovative character of Southern Oregon is reflected in their recruiting practices. They have relied primarily on a combination of staffing agencies, referrals, and kiosk advertising. All three of these methods were first tried in this region.

**Quantitative data**

Data are available from the four divisions of the organization on the number of individuals who applied for work, the number of individuals who are qualified for the position, the number who actually receive job offers and accept them, and the number of number of individuals who remain with the organization at the 6 and 12 month point after hire. Complete data on the recruiting metrics is contained in Appendix B.

**Table 2.1 Estimated costs for recruiting methods**

<b>Fixed costs</b>	Applicant	Referrals	Kiosk	Job service	Agency
Cost of setup (per store)	\$ 20,000.00	\$ 30,000.00	\$ 20,000.00	\$ 40,000.00	\$ 70,000
<b>Variable costs</b>					
Materials cost per applicant	\$ 5.00	\$ 10.00	\$ 1.00	\$ 5.00	\$ 10
Processing cost per applicant	\$ 30.00	\$ 30.00	\$ 15.00	\$ 15.00	\$ 30
Additional pre-hire costs	\$ 20.00	\$ 200.00	\$ 20.00	\$ -	\$ 20.00
Orientation and training	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 1,000	\$ 1,000.00

### ***Another Angle on Recruitment: Manager Focus Groups***

As part of the information gathering process, large scale focus groups have been conducted with department managers. Tanglewood contacted a market research firm to conduct the focus groups, and Tanglewood provided a detailed summary of the major findings. While managers differed considerably in their perceptions of the effectiveness of the different methods, their core concerns were generally quite similar, and can be grouped into four major categories:

1. The most pressing concern for many managers is reducing employee turnover. Although Tanglewood has typical retention rates for a retail chain, the importance of culture and cooperation in the Tanglewood philosophy means that new employees often are not fully integrated into the company's culture until several months have passed. In short, typical retail turnover is not acceptable for Tanglewood. This is seen as an especially dangerous situation as the company expands, since it threatens to undermine the unique elements of the company's approach to retail.
2. There is an excessive lag between the initial contact between many applicants and the actual hiring decision, leading many qualified individuals to drop out of the process. A few managers have suggested that finding a way to concentrate on methods that do not have this problem would be beneficial. The issue of lags in initial contacts and hiring is discussed in your textbook.
3. The recruiting process is administratively cumbersome. Managers want to find ways to reduce the amount of time they have to spend with assessing new candidates. This was partially a point of contention between managers, because some argued that using more computerized applications would be a good idea, while others felt this might give applicants the wrong impression about the organization and its methods.
4. Many new hires without retail work experience do not recognize the importance of positive customer service for sales, and training is often does not solve the problem. Several managers noted that they had discharged new hires for providing inappropriate customer service. A particularly frequent problem is new employees becoming frustrated with customers and refusing to assist them or behaving in a hostile manner. Some managers specifically suggested that new employees needed a more realistic introduction to the difficulties of the customer service role. Other managers suggest that a more positive message would be helpful, since it will draw in more qualified individuals.
5. Many managers also report that they would like to see messages more specifically targeted to the types of people who are likely to fit in with the Tanglewood stores culture. Managers note several elements of the organization's culture (which you read about in the introductory case) that they think should be part of the recruiting strategy.

*Specific Assignment Details*

See Compass.

## **CASE FOUR: MEASUREMENT AND VALIDATION**

### *Case Objectives*

Once concrete goals for hiring have been established and applicants have been generated, the most important part of the staffing process is developing methods to identify individuals who will be the best performers on the job. Anything that identifies good potential performers is a “predictor.” This includes interviews, standardized tests of knowledge, personality measures, job trials, and so on. Although finding good predictors requires intuition about the job, the organization, and the type of people who are going to apply, demonstrating which predictors are most effective requires clear quantitative skills as well.

In this instance, you will review several types of evidence related to predictors and job performance and select a mix of predictors you think will work well. Developing a good selection strategy also means thinking of the process from the applicant’s point of view. The greatest selection system in the world is not effective if it scares the best applicants away. This case is an opportunity to look at the types of measures (found in Appendix C) that are often used in the selection process and determine how applicants might react to them.

### *Hiring for the Store Associate Position*

Two years ago, Marilyn Gonzalez instigated a thorough assessment of the hiring practices in the Tanglewood stores following complaints from many store managers regarding the quality of employees. Results were not encouraging. The current methods for selection received negative reports from managers. Many have noted that their current employees deliver suboptimal work, fail to appreciate the organization’s culture, and have difficulty working in teams. This sometimes means that they have to fire poor performers, which is not good for morale in a team-based organization.

There are few selection methods traditionally used at all Tanglewood stores. The first method for selection is an application blank as shown in Appendix C. Applicants provide some basic information regarding their employment history and education, along with other simple contact information. Ideally, Tanglewood would prefer to contact former employers to get job performance history information, but in practice, very few former employers give much more than dates worked and job titles because of concerns about being sued for disseminating damaging information about their former employees. In practice, then, the only useful information Tanglewood obtains from the application blank is the number of years of work experience a person has and the highest degree they have completed.

The process of selection begins when the applicants turn in their application blanks. These forms are reviewed by the Assistant Store Manager for Operations and HR, who

will also conduct brief interviews. The initial application interview is generally brief and consists mostly of efforts to confirm and clarify information in the application blank. Those who make it past this stage of the process are termed “candidates.”

A more substantial interview occurs with the candidates who are referred to the department manager. There is a relatively loose protocol for how managers should conduct the interviews. Tanglewood provides a list of suggested interview topics, including, “tell me about your previous work performance,” “explain your philosophy of customer service,” and “describe a time when you worked on a team.” Managers are encouraged to develop a warm atmosphere for the interview to send a positive message about the company culture as well. Questions are formalized, although there are no keys for managers regarding what the “right” answers are. The form used for interviews is also supplied in Appendix C. Approximately 30% of candidates who make it to this interview phase go on to become finalists.

Final approval for hires also must come from each store’s manager for operations and human resources. The last stage before job offers are provided includes a background check and some paperwork. Nearly all finalists go on to receive offers.

### *Proposing an Alternative to the Current System*

Based on negative feedback from managers, a corporate committee determined that an ideal solution would require an organization-wide shift to a more detailed selection system. The interview process has been deemed “essential” by most managers, and they are resistant to anything that would modify the interview process. As a result, approximately one year ago the staffing services department initiated a search for good predictors of sales associate performance that would create minimal additional administrative burdens for managers. In the course of this search a number of new methods were brought to the organization’s attention. All of the materials described in this section are presented in Appendix C.

### *Retail Market Knowledge Exam*

The retail market knowledge exam is a set of questions related to the retail industry and Tanglewood’s unique position in the industry. Several of the questions are related to basic knowledge of marketing principles, while others address the factors that separate Tanglewood from other competitors in the industry. This exam was developed in house by the staffing services and marketing divisions.

### *Marshfield Customer Service Biodata Questionnaire and Essay*

Biodata exams are questions for significant life experiences that are potentially associated with performance at work. Marshfield Testing Corporation has given life experiences interviews to thousands of individuals, and based on this huge sample of responses, developed a set of occupation-specific life experiences that they have identified as being associated with job performance. The test costs \$10 per applicant. Newer versions of the test are available which can be administered via computer, or through the stores’ in house kiosk system. The newer versions carry a more substantial

fixed startup cost, but do not carry a “per applicant” cost. The essays are machine scored in a manner similar to résumé scoring software. The customer service questionnaire and essay is two times longer than the sample shown here, but the topics are the same.

#### *Marshfield Applicant Exam*

The Marshfield applicant exam is a test designed to capture problem solving abilities, fluency with numerical processes, and work comprehension. Marshfield Testing Corporation will administer variations on this test to several thousand individuals per year in contexts ranging from managerial selection to staffing for clerks at convenience stores. Like the Marshfield Biodata Questionnaire and Essay, this test can be administered either online or in person. The customer service questionnaire and essay is four times longer than the sample shown here, but the basic topic items are the same.

#### *Personality Exam*

Daryl Perrone conducted a thorough reading of the literature on personality psychology during his undergraduate major (he had a concentration in industrial/organizational psychology at Michigan State University). Based on this knowledge, he independently developed a 20 item measure designed to capture the constructs of conscientiousness and extraversion. He believes that these are the two personality traits that will be most relevant for the position of a retail clerk.

#### *The Validation Procedure*

After assembling these new predictors, 10 stores were selected from the Seattle area to serve as a “test” area. Over the course of the last year, all proposed employees have been administered all the new selection tools during the hiring process. Stores were informed that they would be part of the new staffing system through a corporate memo personally signed by Emerson and Wood. This personalized memo was designed to impress on store managers the importance of gathering complete and accurate data on all employees.

As part of the trial process, Tanglewood has also collected information from all stores that were not engaged in the pilot program. The reason for this use of supplemental data is to investigate whether the pilot was conducted on a representative sample of stores. Each store compiled all the archival data from their computer databases and then sent it to the corporate offices. In the course of this process, it was noted that stores were often not keeping very complete data, so that information on selection outcomes was available for only about half of the nearly 25,000 employees hired in the past year.

Several types of performance measures are kept for all employees at Tanglewood as part of their annual performance reviews. The first measure is *citizenship performance*, which refers to how well employees perform well as team members, cooperate with store policies, and generally set a positive tone for the workplace. Citizenship for each employee is rated on a scale from “1=very poor organizational citizen” to “5=excellent organizational citizen.” Absence is a simple count of the number of days on which an employee did not show up for a scheduled work shift or was more than ½ hour late for a scheduled shift. Performance is a direct measure of completion of assigned work tasks

and effort on the sales floor, as rated by the employee's supervisor on a scale from "1=very poor task performance" to "5=excellent task performance." Finally, promotion potential is a manager's subjective impression of how likely it is that they will recommend an employee for promotion to a higher level in the organization at some point in the future.

To estimate the validity of the current and proposed selection methods, the data regarding employee performance were taken from the organizations' human resources information systems and several statistical analyses were performed. The statistical analyses were performed in two separate stages. Both steps used a predictive validation design, meaning that predictor data measured at the point of hire was correlated with performance data one year later. For the predictive design, only interviews and application blanks were actually used as part of the selection process.

The first stage of the statistical analysis was to estimate correlations between the archival measures of education, work experience, and managerial interviews and the measures of citizenship, absence, performance, and promotion potential. These data are shown in Table 3.1. The top row for each predictor shows the correlation between the predictor and the corresponding work outcome. The p-values represent the statistical significance of each correlation.

The second stage of the statistical analysis was to estimate correlations between the traditional predictors (education, work experience, and managerial interviews) and the measures of citizenship, absence, performance, and promotion potential, along with correlations between proposed predictors (retail knowledge, biodata, applicant exam, conscientiousness, and extraversion). These data are shown in Table 3.2.

**Table 3.1 Data from Stores Employing the Traditional Selection Method**

		Citizenship	Absence	Performance	Promotion potential
Education	Correlation	0.03	-0.02	0.15	0.17
	p-value	< 0.01	0.03	< 0.01	< 0.01
Work experience	Correlation	0.17	0.07	0.22	0.25
	p-value	< 0.01	< 0.01	< 0.01	< 0.01
Interview score	Correlation	0.13	0.01	0.04	0.32
	p-value	< 0.01	0.26	< 0.01	< 0.01

*N=12510***Table 3.2 Data from stores employing the proposed method**

		Citizenship	Absence	Performance	Promotion potential
Education	Correlation	0.01	-0.01	0.08	0.14
	p-value	0.77	0.77	0.02	< 0.01
Work experience	Correlation	0.04	-0.04	0.16	0.18
	p-value	0.25	0.25	< 0.01	< 0.01
Interview score	Correlation	-0.02	0.03	0.01	0.16
	p-value	0.57	0.39	0.77	< 0.01
Retail knowledge	Correlation	0.02	-0.07	0.12	0.33
	p-value	0.57	0.04	< 0.01	< 0.01
Biodata	Correlation	0.17	-0.17	0.22	0.34
	p-value	< 0.01	< 0.01	< 0.01	< 0.01
Applicant exam	Correlation	0.03	-0.02	0.26	0.34
	p-value	0.39	0.57	< 0.01	< 0.01
Conscientiousness	Correlation	0.14	-0.33	0.17	0.29
	p-value	< 0.01	< 0.01	< 0.01	< 0.01
Extraversion	Correlation	0.09	0.09	0.22	0.06
	p-value	0.01	0.01	< 0.01	0.09

*N=832*



*Specific Assignment Details*

See Compass.

## **CASE FIVE: DISPARATE IMPACT ANALYSIS**

### *Case Objectives*

The most significant equal employment opportunity concern for any organization is when a large class of employees gathers together to propose that they have been discriminated against. In this case, you will be able to assess a case of adverse impact proposed by African-American employees of Tanglewood in Northern California. This case will give you an opportunity to use the quantitative material described in your textbook in a more elaborated employment setting.

Simply determining whether an organization has problems related to the diversity of its workforce is a good first step for addressing legal complaints, but it does not resolve the underlying problems that lead to disparate impact in the first place. It is also necessary to develop specific staffing strategies in terms of recruiting and promotion that help to minimize disparate impact. Thus, the second stage of the case incorporates ideas from several chapters to provide a full picture of how organizations can improve diversity.

### *Recruiting and Hiring for Northern California*

The typical recruiting and hiring practices for Northern California are based on a model that has been successful in finding qualified, energetic salespeople and talented managers. When openings occur, there is a two-pronged recruiting approach. First, as an internal method of selection, existing employees are solicited for recommendations. For higher level positions, the internal selection process involves promotion from within. Second, as an external method of selection, advertisements are placed in the popular press and applications are taken from the internet sources.

Final selection decisions are based on a few basic principles as described in other sections of the casebook. One clear concern is that any new employee *must* fit well with the group into which they are selected. Many managers specifically solicit the opinions of the work group when making hiring decisions. In particular, for higher level positions there are often group interviews. Work skills are seen as “trainable,” so they are often de-emphasized. Instead, the focus is much more on personality and values.

### *A Legal Conundrum*

While Tanglewood central management strongly supports the selection methods utilized in Northern California, the formation of a class action lawsuit is creating a new problem. The national law firm of Eaglette-Schubert has begun to contact many of Tanglewood’s Northern California minority employees and encourage them to band together to sue the organization. The initial impetus for this attention was an internal complaint filed by an African-American shift leader from Stockton named Stanley Root, who claimed he was repeatedly passed over for promotion opportunities despite positive performance

appraisals. Marilyn Gonzalez attempted to contact Mr. Root several weeks after the complaint was filed, but he told her that because he saw such delayed action from the company on his behalf, he was discussing the matter with Eaglette-Schubert and any comments or questions should be directed to the lawyers who were taking on his case.

Eaglette-Schubert has a long history of successful class action lawsuits against large companies in the retail industry, with some cases resulting in decisions in the millions of dollars. Of course, such high dollar amount cases also usually also mean heavy negative publicity. Upper management is nervous.

### **The Tanglewood Philosophy**

Tanglewood generally prides itself on its openness, inclusiveness, and encouragement of diversity. Tanner Emerson and Thurston Wood both have tried to build the company on a model of inclusiveness, and this means that judgments are made about individuals solely on the basis of work and character. As such, the possibility of a lawsuit presents a real problem for the company. The selection strategy for Northern California is widely seen as a success story within the company, but the company wants to take any steps possible to ensure that it is not engaging in practices that violate the intention to embrace diversity.

The current method for hiring managers involves a targeted recruiting strategy with a strong emphasis on internal selection. Individuals who show particular promise in their work are encouraged to apply for managerial positions when they open up. Although managerial job openings are posted within the organization through in-store bulletin boards as well as e-mail notifications, individuals who are recommended by their current supervisors have a strong advantage in the process. The external recruiting strategy also tends to favor public postings of job availability.

The company's board of directors would ideally like to gain specific information that will definitively show if there is discrimination. If there is evidence that a problem is occurring, the company would prefer to have a low-publicity settlement with minority employees and take steps to improve the climate for minorities. However, if there is not evidence that there is a problem with their hiring methods, they would much prefer to keep their current methods in place.

### **The Plaintiffs' Strategy**

The specific details of the case to this point have few details pointing to specific actions or behaviors that suggest overt or intentional discrimination. In fact, Eaglette-Schubert's early communication with the company has suggested they see the problem as arising because the Tanglewood uses an internal network to find new employees and promote those inside the company. The process is therefore potentially closed to minority groups. According to the disparate impact theory of discrimination, there is no need to prove discrimination was intentional, but simply that there is a difference in employment outcomes between groups falling under a protected class.

The Eaglette-Schubert team appears to be using a “birds of a feather” strategy they have pursued previously to argue for how disparate impact occurred. In effect, they argue that extensive reliance on within-company networks makes many companies prone to discrimination because of homophily in social networks. Homophily is a social psychology term for the widely observed phenomenon that most people seek to be around those who are similar to them. By extension, majority group managers will seek out other majority group individuals to include in their social relationships. This means that a company can engage in wide-ranging discrimination even without overt discriminatory intent, but based on subtle, unobserved preferences. The law firm has used a social psychologist named Frances M. Bosgaw employed at Cornell University in the past. Her research generally supports the appearance of gender-based homophily, but the research is less specific with regards to the subject of race.

The pursuit of this strategy is interpreted as a double-edged sword within Tanglewood. First, as noted by Marilyn Gonzalez, the homophily argument is being pursued because there is no evidence that the company is deliberately acting to discriminate against minorities. The strong diversity statements in the company handbook and the clear consequences that have been shown to individuals who engage in discriminatory behavior are one reason the company has a good reputation in terms of diversity. However, this information may be considered irrelevant, because the Eaglette-Schubert theory of the case doesn't hinge on intentional discrimination. So Tanglewood must take a careful look at their outcomes across multiple jobs and be certain that they are in compliance with the law.

### ***The Next Stage***

To assess whether there is a problem with statistical representation of minorities at Tanglewood, the first step is to conduct statistical analyses of current employment practices. The information is presented for store associates, shift leaders, department managers, assistant store managers, and store managers.

### ***Basic Analysis Procedure for EEO***

Analyzing disparate impact requires comparing the availability of protected classes (i.e., the proportion of the qualified and available work force who are members of protected classes) to the utilization of protected classes (i.e., the proportion of those hired or employed who are members of protected classes) for each job in the organization. In a flow analysis, data from the organization's hiring practices and applicant pool are used to compare how many individuals were hired from various groups in the applicant pool. In a concentration analysis, the distribution of employees within the organization is assessed.

### **Selection ratios and the 4/5 rule**

One relatively simple way to assess disparate impact is to compare the proportion of applicants who are hired from several sources. This is done by assessing selection ratios as described in Exhibit 2.5 in your textbook.

The Uniform Guidelines in Employee Selection Procedures provides a simple guide to calculate differences in hiring rates. The rule states that if the organization's utilization rate of a minority group is below four-fifths (or 0.80) of the utilization rate for a majority group, disparate impact may exist. To use the 4/5ths rule, divide the hiring rate for two groups.

As an example, assume that you have a total of 100 positions to fill. The applicant pool consists of 52 men and 48 women. You give these applicants a test to determine their physical strength, and find that 39 men and 24 women pass the test and would be hired. In this case, the  $SR_{\text{maj}}$  is  $39 \div 52 = 0.75$ , and the  $SR_{\text{min}}$  is  $24 \div 48 = 0.50$ . To compute the selection ratio, take  $0.50 \div 0.75 = 0.67$ . This is under four-fifths (i.e. 0.80), so disparate impact is said to exist for this strength test. This does not automatically mean that there is discrimination, but it does mean that it is incumbent on the organization to demonstrate that the strength test is actually job related.

### **Concentration statistics**

A second method for assessing disparate impact is examining concentration statistics. The basic procedure is also outlined using Exhibit 2.5 in your textbook. Legal guidelines offer no standard statistical tests to assess concentration statistics. Managers are instead expected to notice if there are different proportions of protected classes across organizational levels. For this case, the biggest problem would be a high concentration of minorities in low level positions coupled with a high concentration of Whites in higher positions. Using gender as an example, if 50% of store associates are women, and only 30% of managers are women, this suggests the promotion system is not open to women.

### Historical Hiring and Promotion Data: Applicant Flows

<i>Occupational category</i>			<i>Total</i>	<i>White*</i>	<i>Total Non-White</i>	<i>African-American*</i>
Store Associates	External hires	<i>Applicants</i>	<b>18226</b>	15436	2790	594
		<i>Hires</i>	<b>3832</b>	3221	611	135
		<i>Selection ratio</i>	<b>21.02%</b>			
Shift leader	External hires	<i>Applicants</i>	<b>392</b>	<b>320</b>	<b>72</b>	<b>17</b>
		<i>Hires</i>	<b>61</b>	<b>54</b>	<b>7</b>	<b>2</b>
		<i>Selection ratio</i>	<b>15.56%</b>			
	Internal hires	<i>Applicants</i>	<b>864</b>	<b>712</b>	<b>152</b>	<b>30</b>
		<i>Hires</i>	<b>280</b>	<b>241</b>	<b>39</b>	<b>6</b>
		<i>Selection ratio</i>	<b>32.41%</b>			
Department manager	External hires	<i>Applicants</i>	<b>1242</b>	<b>1074</b>	<b>168</b>	<b>44</b>
		<i>Hires</i>	<b>94</b>	<b>82</b>	<b>12</b>	<b>3</b>
		<i>Selection ratio</i>	<b>7.57%</b>			
	Internal hires	<i>Applicants</i>	<b>589</b>	<b>509</b>	<b>80</b>	<b>21</b>
		<i>Hires</i>	<b>124</b>	<b>108</b>	<b>16</b>	<b>3</b>
		<i>Selection ratio</i>	<b>21.05%</b>			
Asst. store manager	External hires	<i>Applicants</i>	<b>146</b>	<b>123</b>	<b>23</b>	<b>7</b>
		<i>Hires</i>	<b>17</b>	<b>15</b>	<b>2</b>	<b>0</b>
		<i>Selection ratio</i>	<b>11.64%</b>			
	Internal hires	<i>Applicants</i>	<b>108</b>	<b>90</b>	<b>18</b>	<b>4</b>
		<i>Hires</i>	<b>27</b>	<b>25</b>	<b>2</b>	<b>1</b>
		<i>Selection ratio</i>	<b>25.00%</b>			
Store Manager	External hires	<i>Applicants</i>	<b>50</b>	<b>42</b>	<b>8</b>	<b>2</b>
		<i>Hires</i>	<b>5</b>	<b>4</b>	<b>1</b>	<b>0</b>
		<i>Selection ratio</i>	<b>10.00%</b>			
	Internal hires	<i>Applicants</i>	<b>81</b>	<b>66</b>	<b>15</b>	<b>4</b>
		<i>Hires</i>	<b>13</b>	<b>9</b>	<b>4</b>	<b>0</b>
		<i>Selection ratio</i>	<b>16.05%</b>			

\*Non-Hispanic

## Historical Concentration Data

<i>Occupational category</i>		<i>Total</i>	<i>White*</i>	<i>Total Non-White</i>	<i>African- American*</i>
Store Associates	<i>Employees Concentration</i>	2760	2307 83.59%	453 16.41%	95 3.44%
Shift leader	<i>Employees Concentration</i>	552	464	88	10
Department manager	<i>Employees Concentration</i>	391	341	50	9
Asst. store manager	<i>Employees Concentration</i>	69	64	5	2
Store Manager	<i>Employees Concentration</i>	23	16	7	0
Total <i>*Non-Hispanic</i>	<i>Employees</i>	3795	3192	603	116

*Specific Assignment Details*

See Compass.



## CASE SIX: INTERVIEW

### *Case Objectives*

Research on interviews has generally shown that standardized procedures are higher in their reliability and validity than unstructured interviews. Learning how structured interviews are constructed is an important component of the selection process, as is getting a “feel” for what it’s like to give and receive an interview. This case gives you an opportunity to do both.

An additional concern in the selection process is ensuring that each new predictor is adding something new to the process. As such, you will assess what the current methods of selection measure, and determine what new information can be brought out by an interview.

### *Basic scenario*

As you learned in the third case, Tanglewood is working to improve the quality of their selection systems. The process of assessing selection methods initiated by Marilyn Gonzalez was not limited to store associates—it also covered department managers, assistant store managers, and store managers. Although the method of using an increasing number of tests and forms was generally been seen as an adequate update to the process for hiring entry level employees, store managers agree that this is not a sufficiently rigorous method for selecting department managers.

The most important concern is that individuals who are promoted from within the organization to the department manager level are typically viewed by other employees as very qualified and integrated into the corporate culture and mission of Tanglewood. Individuals who are hired from outside the organization to be department managers, on the other hand, often have a very difficult transition into the organization and make decisions that are in conflict with the corporate culture. They are seen as outsiders who do not really “get” what it means to be part of the Tanglewood family.

The current method of selection for external managers looks very much like the method of selection for store associates. All applicants complete a brief job application form which provides information on education and years of work experience. Some pilot stores also have begun using the Marshfield Applicant Exam and Retail Knowledge test (described in the measurement case), and based on the validation evidence described earlier, this will become a regular part of the selection procedure across the chain. This information is an important determinant of who is minimally qualified, but is generally not the primary determinant of who is or is not eventually hired. The most important part of the selection process is the interview.

The current interview form provided for these positions is shown in Appendix C. This interview protocol is no different than the interview protocol for store associates, except that the Assistant Manager for Operations is expected to take into consideration the fact that the department manager position requires considerably more responsibility and intellectual work. Most store managers and assistant store managers for operations agree that the current system is simply not detailed enough to produce a good selection protocol. Even experienced managers find that there is occasionally an unpleasant surprise in store for them when a new employee actually begins work and the employee is not at all the sort of person they thought they had assessed in the interview.

### *Improving the Process*

One of the primary problems in the process of selecting external candidates to serve as department managers is the lack of structure to the selection process. In most cases, managers request that applicants fill out the work history applicant, a brief résumé, and then interview everyone who applies. This is a time consuming process, because many candidates simply do not have the requisite skills for the job. Other managers only interview individuals who have a certain number of years of work experience, experience in specific fields, or a specific educational background, but there is not a general consensus on which method is best.

Tanglewood would like to formulate a more efficient policy for screening. This is especially important in light of the large number of potential new predictors that have been included in the system as part of Marilyn Gonzalez and Daryl Perrone's new procedures. They ideally would like to develop a sequence like that shown in Exhibit 8.3 in the textbook that moves each applicant from the stage of being an applicant to an offer receiver.

To briefly review some financial information, the Marshfield Applicant Exam and Marshfield Customer Service Biodata Questionnaire and Essay are both copyrighted instruments that cost \$10 each per applicant. Alternative computerized versions of these materials that do not carry a "per applicant" cost are available for in-store kiosks or can be completed online, but the startup costs are much higher for the electronic versions. Because the personality test and customer service tests were administered entirely in-house, they are free for Tanglewood.

Unfortunately, there are no validity coefficients for the position of Department Manager as there has been no period of testing yet. Tanglewood believes that, based on the preliminary data provided by the store associates sample, they would like to use all of these predictors. A more formal validation procedure will be initiated later in the process, but for now, Tanglewood would like a selection plan developed that will take the sequencing of all of the predictors into account.

### *Methods for Developing the Interview*

A second major problem, besides the difficulties in creating a good sequence of staffing procedures, is the fact that the general process of interviewing is not seen as especially effective. Many managers complain that even when they adhere to the system described by the interview guidelines provided in Appendix C, they still do not feel like they can differentiate good from bad candidates. Moreover, anecdotal evidence suggests that the actual content of interviews is extremely different across locations. The possibility that candidates are receiving different interview questions is seen as a potential legal problem.

The Tanglewood response is to create a new and better interview protocol that can be used across the chain. Given the problem of low standardization, lack of guidelines, and the general knowledge of research on interviews in the staffing services department, it has been decided that a structured interview will be needed. Daryl Perrone has provided you with several directives for writing structured interview questions. He provided them to you in the form of a list as follows:

- The best interview questions have several key qualities. First, they are broad enough to actually allow variability in answers; in other words, not every applicant gives the same answers. Second, they are directly relevant to *important* elements of the job. Third, they do not reflect knowledge or skills that a person could realistically acquire while on the job.
- Situational interviews: the core to writing good situational interview questions is establishing a scenario that the applicant will react to. These can blend into work samples or problem solving tasks related to the job. Good situational interview questions are realistic enough that the applicant will actually experience the same emotions you are trying to represent. For example, in a situational interview designed to assess customer service skills, an applicant might be asked to confront a manager pretending to be a frustrated shopper. In a situational interview designed to assess teamwork ability, an applicant might be asked how he or she would cooperate with a group of individuals to solve a difficult problem at work.
- Behavioral interviews: these are interview questions that ask a person to explain previous experiences related to the KSAO required for the job in question. Many of these questions begin with “Tell me about a time when you had to...” For example, an individual interviewing for a customer service job might be asked, “tell me about a time that you had to interact with an angry customer.” The key function of behavioral interviews is to obtain a more detailed picture of the experiences of a candidate and determine how well they can relate their experiences to the position at hand.
- A scoring key is an extremely important part of the structured interview process. Most scoring keys are developed by describing behaviors on a graduated scale ranging from very poor to very good. A good scoring key is behaviorally specific and reflects real attributes that a person might possess and demonstrate on a job. The biggest problem with scoring keys is that they are often too easy or too hard, so actual scores end up being bunched together with no real variance.

To facilitate the completion of this task, the company also has provided you with a sample of a behavioral interview questions below in a book published in 1964 titled “The Structured Interview” by Nivram Etenud. This is only a single question, and is much different than the job you are looking at, but Daryl Perrone believes it should give you an idea of what Tanglewood would like to see.

Job title	Judge, State of Michigan
Item description	This is a situational interview question requiring the applicant to formulate jury instructions for an employment law case.
Performance dimensions	<ul style="list-style-type: none"> <li>• Task: Instruct juries on applicable laws, direct juries to deduce the facts from the evidence presented, and hear their verdicts.</li> <li>• Knowledge: Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the political process.</li> <li>• Skills: Using logic and reasoning to identify the strengths and weaknesses of alternative solutions. Communicating effectively verbally or in writing.</li> <li>• Abilities: Oral expression, information ordering.</li> </ul>
Interview question	The case before you involves a plaintiff who has been denied employment by a large corporation due to discrimination by one of the corporation’s employees in the process of hiring. The question at hand hinges on the extent to which the organization is liable for the actions of its employee. Provide instructions to a jury that will represent the legal principle on which they are deciding the company’s liability.
Original scoring key	<p>1 point: Instructions fail to mention critical concepts related to agency, in particular, failing to mention that the defendant’s actions lead to the agent having authority to act on behalf of the defendant OR instructions are highly leading in such a way that they could prejudice a jury against the defendant or plaintiff.</p> <p>2 point: Instructions are sufficient to define specific terms, but use technical terminology while failing to define what the terms mean (e.g., use of terms like liability with no definition) OR the instructions are correct, but excessively vague with respect to the relationship features required to establish agency.</p> <p>3 point: Instructions are sufficient to define terms, and define all technical terminology, but include complex sentence structure (e.g., multiple clauses or difficult vocabulary) that would make it difficult for a person with a high school education or less to understand.</p> <p>4 point: Instructions fulfill all the requirements of number three, but also do so in very straightforward language that is easy to understand, with only simple sentences and no complex vocabulary.</p>
Interviewer comments	<p>The individual who piloted this item felt that the scoring key did not do a sufficient job of defining the terms for “simple language” and “easy to understand.” In response, we have changed the four point option to read:</p> <p style="padding-left: 40px;">Instructions fulfill all the requirements of number three, but also do so with only one clause per sentence, no negations (negative wording), or words identified by two or more raters out of a panel of three as being ‘difficult’ or ‘complex.’</p> <p>In addition, the person who piloted this item also suggested that the actual specific legal language related to agency be included. To rectify this, we looked at the Michigan criminal law and found the following definition:</p> <p style="padding-left: 40px;">M Civ JI 38.01 Agency Relationship: Definitions of Agent and Principal An “agent” is a person who is authorized by another to act on [his / her / its] behalf. The [person / entity] who has given the authority and has the right to control the agent is called the “principal.”</p>

*Specific Assignment Details*

See Compass.

## **CASE SEVEN: SELECTION DECISION MAKING**

### *Case Objectives*

While there are numerous staffing decisions that involve investigating the outcomes for large groups of employees, the many of the most important decisions involve only one position and a small number of applicants. The current case examines just such a case for a particularly important location for Tanglewood.

You will read through a series of resumes, look over reports made during interviews, and investigate the results of several standardized measures of employee suitability. This case thus integrates information from several earlier cases that have involved making an appropriate choice of measures, but now applying it with a specific group of individuals. From these multiple pieces of data, you will develop a recommendation for hiring. You also will develop guidelines for how similar selection decisions could be made for the entire organization.

### *The situation of interest*

You have been asked by Tanglewood to assist them with an important hiring decision. The company needs a new manager for their flagship store in Spokane. This position is important for a number of reasons. First, this is the single largest store in the chain, with approximately double the floor space of other locations. The Spokane store has shown very strong revenues for years.

This store also has important symbolic value. This store is only a few blocks from the first Tanglewood store. Recent remodeling efforts have also made this one of the most elaborate stores in terms of appearance, with features like an open kitchen restaurant where all the food is prepared and served using Burford Kitchen masters, an outdoor adventure area with a rock wall and a live kayak simulator, and quarterly demonstrations of the latest clothing options that will be presented in other stores. Nearly all managers will spend at least sometime working in the Spokane store as part of their initial training.

Finally, the store is commonly used as a first testing ground for new products. It is an ideal location for this option, because it is one of the most representative locations. Because it is on the outer edge of Spokane, many customers are from suburban areas, but because of its size and unique features, urban and rural customers who make the trip to the store as well. This means that this store is closely aligned with the corporate marketing function, and good managers must understand how to do marketing and promotions from the bottom up.

### ***The applicants***

Because this is such an important position, Marilyn Gonzalez arranged to have all candidates complete the full battery of proposed selection tools. The importance of this position also has led the stores to conduct a closed recruiting operation. Only twenty individuals were contacted as potential sources. The internal candidates were contacted through referrals made by regional managers, whereas the external candidates were based on nominations from individuals in the corporate offices.

You have received résumés, retail knowledge tests, standardized test scores from the Marshfield Applicant Exam, biographical data, and scores on several personality dimensions for the 10 individuals from the initial applicant pool who expressed a strong interest in the position. This information is all available in the attached Tables in the Appendix.

### ***Future practice***

There are several questions the company has about its future hiring practices for store managers as well. It is clear that there will be a substantial revision to the collection of information from applicants based on your recommendations from Case 3. This does not completely resolve the problem of how a final selection decision will be made.

The current method for selection in managerial positions involves a two stage process that bears some resemblance to the process for hiring store associates, but at a higher level. There will of course be interviews in the process, but the organization needs more information about how to assess individuals before they go on to the final interview process, because managerial interviews are very expensive in terms of staff time.

*Specific Assignment Details*

See Compass.



## **CASE EIGHT: RETENTION MANAGEMENT**

### *Case Objectives*

Voluntary turnover is the final stage of the employment relationship. When voluntary turnover occurs, employees who have been screened, selected, socialized, and trained in the organization depart despite the organization's attempts to keep them. This clearly can be a considerable problem for an organization, since all the costs associated with staffing a new employee now must be incurred again for a new employee. However, voluntary turnover is not always a negative event. When an individual who has a poor productivity profile, negative attitudes towards the job and organization, and superior alternatives elsewhere leaves, it can be a positive outcome for the organization and the (former) employee.

In this case you will review information related to turnover in managerial positions for Tanglewood and determine whether managerial turnover is more likely to be a positive or negative event for this organization. You will also use the techniques described in your textbook to develop suggestions for Tanglewood so that they can ensure that they are retaining the employees that they want to keep to the greatest degree possible.

### *The Situation*

As you may have noticed when analyzing the transition probability matrix in the planning exercise, there was a 34% annual turnover rate among store managers and assistant store managers in Washington during the past year. This is an unacceptably high number from Tanglewood's point of view. Such high levels of turnover are likely to create a feeling of instability among lower level employees, and generally indicate that the organization will have difficulty creating effective long-term goals in these stores. Unfortunately, this high turnover among managerial employees is even more problematic because of the costs involved.

Managerial survey is a very sensitive issue for Tanglewood. The process of finding good managers obviously begins with recruiting. A very large number of individuals must be found during the recruiting phase, because, as you saw in case 4, only 11% of external applicants are selected to become assistant store managers and only 10% of external applicants are selected to become store managers. After hiring, every manager, regardless of their status as internal or external hires, is put through a two month training program that includes trips to the corporate offices, mentoring from other store managers and the regional manager, and culminating in a public welcoming ceremony at the store where the manager will work.

There is a downside to the process of training managers. Excellence in managerial performance is often observable from the outside as well because competitors can walk into the stores and see which ones are functioning well. It is common for particularly

successful store managers to receive offers from other companies that are trying to capture some of the Tanglewood “essence.”

### *The Employee Satisfaction Survey*

The Tanglewood employee relations department administered a survey every year to assess the attitudes of employees towards several aspects of their employment. Although the purpose of the survey is to collect baseline information on employee attitudes, Marilyn Gonzalez believes that these survey responses will be an ideal method to track the reasons why some managers are more likely to turnover.

The annual employee survey is conducted in June. Boxes of blank surveys are sent to regional managers, who then use central routing to send surveys to each store. The survey was initiated to give employees an opportunity to express their feelings about key topics that Tanglewood thinks will benefit employees. Given the overall organizational culture, it should be clear that employee satisfaction is an important issue. Emerson and Wood send bulk e-mails to all store managers to encourage them to get a 100% response rate from their employees. However, it is common for less than 50% of the employees to complete surveys.

An example of the survey is contained in Appendix E. The survey asks questions that can be broken down into four major topics, as follows:

#### *Supervisor satisfaction*

The supervisor satisfaction questions encourage employees to describe their relationship with their immediate supervisor and the extent to which they are satisfied with the direction they receive on a day to day basis. Tanglewood spends a great deal of money training supervisors on the “Tanglewood way” so they are especially concerned that these principles are carried out in practice.

#### *Work satisfaction*

Work satisfaction relates primarily to the degree to which employees believe that their tasks are interesting, fulfilling, and contribute to a meaningful life. The participatory system at Tanglewood puts a great deal of responsibility on employees to make their work enjoyable, but the corporate offices still want to make certain that every effort is made to ensure that employees have the freedom to do work they enjoy.

#### *Pay satisfaction*

Tanglewood realizes that because they place a great deal of responsibility in employees’ hands, they need to ensure that employees feel they are being adequately paid for this additional effort. At the same time, because Tanglewood spends a great deal of time and energy creating an enjoyable workplace, they believe that they should not make pay too much a focus of their human resources activities. The company typically is a market leader in compensation relative to discount retailers like Target or WalMart, but pays slightly less than stores like Kohls, J.C. Penny, or Sears.

### *Benefits satisfaction*

The benefits package offered by Tanglewood consists of basic medical coverage for most employees, a 401K program, and maternity leave benefits. Additional benefits for higher level employees include 50% tuition reimbursement for undergraduate education and. Within the corporate human resources function, Marilyn Gonzalez has been increasingly critical of the lack of innovative benefits offerings. Emerson and Wood recently proposed that there be an overhaul of the organization's benefits because they do not create much of an impression on employees.

### *Regional data*

Table 7.1 contains summary information from the employee surveys, the "competition index," and turnover. Because the most pressing concern is managerial turnover, only data for store managers and assistant managers is displayed. The data is collected by the staffing services division and then summarized across stores for a five-year period. Having this long term aggregated data makes certain that the results are reasonably robust.

The competition index is a measure of the number of local businesses that might draw employees from Tanglewood. The scale ranges from 1 to 10, with higher values indicating more competition. Some of the factors that go into the development of the competition index include the number of other retail establishments in the area, the total square feet of retail available, and the number of other Tanglewood stores. This measure was not specifically developed for turnover analysis, but the corporate office believes that it probably is a good indication of the number of alternative organizations that might want to hire Tanglewood's managers.

**Table 7.1 Turnover Data Across Locations**

Region	Work satisfaction	Supervisor satisfaction	Pay satisfaction	Benefits satisfaction	Competition Index	Turnover Rate	Total Turnover
Eastern Washington	3.2	4.1	2.0	4.3	7.8	0.33	165
Western Washington	2.9	4.4	3.9	4.5	5.2	0.27	135
Northern Oregon	2.1	3.6	1.5	3.8	6.8	0.41	148
Southern Oregon	3.1	4.8	2.7	4.5	5.4	0.24	77
Northern California	2.8	3.3	4.1	3.1	8.3	0.48	221
Idaho	3.9	4.2	3.0	4.1	4.1	0.29	99
Montana and Wyoming	4.4	3.3	4.1	3.5	3.8	0.36	130
Colorado	3.9	3.5	4.7	3.2	7.9	0.46	212
Utah	2.5	3.7	4.5	3.6	4.6	0.28	106
Nevada	2.3	2.8	2.9	2.4	3.7	0.33	125
New Mexico	3.6	3.2	4.8	2.9	4.2	0.28	101
Arizona	4.1	2.9	2.5	3.1	7.6	0.39	172

**Correlations for individual surveys**

Daryl Perrone has also developed a correlation matrix that describes the relationship between surveys and performance indicators. This is similar to the information described in the validation chapter. Perrone thinks the same methods can be used to assess turnover as can be used to assess selection methods, since turnover is “selection in reverse.” These data are available only for 153 managerial employees across the entire chain over time. To ensure that the data are valid, only one year of information is used, so that the same managers are not being counted multiple times. The final row presents correlations between the performance indicators and turnover as well. Remember that turnover is a negative outcome. A negative relationship between satisfaction and turnover means that those with a positive attitude toward the job are less likely to turnover. This also means it generally is preferable to see negative correlations between performance indicators and satisfaction, because it means that those with higher levels of performance are less likely to leave the organization.

**Table 3.2 Correlations between survey data and performance indicators**

		Citizenship	Absence	Performance	Turnover
Work satisfaction	Correlation	0.15	-0.17	0.28	-0.13
	p-value	0.06	0.2	<0.01	0.11
Supervisor satisfaction	Correlation	0.22	0.09	0.16	-0.19
	p-value	<0.01	0.27	0.05	0.02
Pay satisfaction	Correlation	0.03	0.01	0.04	0.09
	p-value	0.71	0.90	0.62	0.27
Benefits satisfaction	Correlation	0.09	-0.07	0.12	-.24
	p-value	0.27	0.39	0.14	<0.01
Turnover	Correlation	-0.19	0.32	0.34	n/a
	p-value	0.02	<0.01	<0.01	

**N=153**

**Qualitative data: Exit interview results**

Staffing services has strongly encouraged the regional managers to carefully interview their managerial employees when they turnover. Because it is assumed that the regional managers will have some familiarity with the employees they are going to interview, staffing services has traditionally encouraged a friendly, informal discussion that will take place soon after the employee has turned in a resignation. Regional managers are instructed to, “ask the employees about what factors influenced the manager’s decision to

leave Tanglewood.” The content, pacing, and direction of the interview questions are left to the manager’s discretion.

Because of these fairly loose guidelines, there is a great deal of variety in the form and content of these interviews. However, there are some broad areas of similarity among the responses. Daryl Perrone read through dozens of the interview reports provided by managers and developed the three most significant trends he noted.

### **Departure because of superior alternatives**

One major reason managers say that they are leaving the organization is because they have found superior alternatives. Many of these managers express some regret about leaving, but at the same time, state that there are certain career outcomes that Tanglewood simply does not provide at the present time. Three representative statements from exit interviews are below:

*“As much as I love it here, I just can’t pass up a job that pays 25% more per year to start in the high tech industry. I also think it’s just time for me to try out some different work”*

Assistant Manager, Western Washington

*“I would stay if Tanglewood would help to finance my MBA. But I know they won’t, and I know that my new employer will.”*

Assistant Manager, Arizona

*“My new job pays me \$10,000 a year more, and I can get my whole family on my health plan for free. From my point of view, that’s a real no brainer.”*

Store Manager, Northern California

### **Departure because of dissatisfaction with the organization’s direction**

A second reason many employees say that they want to leave Tanglewood is because they are dissatisfied with the direction of the organization. Although Perrone is reluctant to make strong statements about trends in these comments, he did notice that there appeared to be more employees from the eastern and southern locations who made these comments:

*“I came on board because I thought Tanglewood would be a different type of retail chain; you know, a place where people worked because they actually liked what they did. But for people like me who are working in a store that used to be run by Mirabelle [a former rival that Tanglewood bought out], that old culture of command and control is still there. It’s too much of an uphill battle to make employee participation work here.”*

Store Manager, New Mexico

*“It seems like a lot of people in upper management here don’t really know what they want, and that’s frustrating. If I really thought this company had a mission, I’d follow it. But as it is, we seem to be constantly teetering between this ‘participation’ concept and standard retail.”*

Assistant Manager, Utah

### **Departure because of major life events**

The final common reason for employees to leave, according to exit interviews, is that some event outside of work has made it necessary for them to seek work elsewhere. The most common reasons are family events, such as the employee needing to take time off to care for a sick relative, the birth of a child, or relocation because of a significant others’ job offer. Two typical examples follow:

*“It’s hard for me to leave, really. I’ve been working with Tanglewood ever since I graduated from college fifteen years ago. In many ways, it’s like a family to me. However, my wife just found a great opportunity in Chicago that we don’t want to pass up”*

Store Manager, Eastern Washington

*“My dad’s been really sick lately and I think that I need to be in Florida for him. You all have been great to me while I’ve been here, but family has to come first.”*

Assistant Manager, Idaho

*Specific assignment details:*

See Compass.



## APPENDIX A: JOB DESCRIPTIONS

### Store Manager

Tasks			KSAOs	
Specific tasks	Task Dimensions	Importance (% time spent)	Nature	Importance to Tasks (1-5 rating)
1. Manage the entire store to increase sales and ensure efficiency. 2. Coordinate store-level activities with the entire organization's strategic policies. 3. Organize special promotions, displays and events.	A. Planning and coordination	50%	1. Knowledge of organizational policies and practices 2. Skill in judgment and decision making 3. Ability to think creatively and develop original solutions	4 5 4
4. Analyze sales figures and forecasting demand for future periods 5. Determine appropriate policies and procedures for inventory, purchasing, and personnel management that will apply storewide. 6. Ensure quality, customer service, and health and safety standards are met storewide. 7. Oversee the store's management of legal and security issues.	B. Administration	20%	1. Knowledge of retail management policies and practices 2. Knowledge of legal precepts underlying personnel management 3. Skill in the analysis of financial and operational data 4. Ability to reason inductively	3 4 5 3
8. Chairing meetings with assistant and department managers. 9. Assess customer satisfaction to ensure appropriate customer service is being provided 10. Establish programs and training to ensure all employees are providing appropriate customer service	C. Supervision and leadership	30%	1. Knowledge of the customer base served by the store 2. Skill in managing personnel resources 3. Communication and speaking skills	4 4 5
<b>Job context:</b> Indoors, office, business clothes, mostly sitting and standing, no environmental or job hazards				

### Assistant Store Manager

Tasks			KSAOs	
Specific tasks	Task Dimensions	Importance (% time spent)	Nature	Importance to Tasks (1-5 rating)
1. Manage an area (hardlines, softlines, or operations/hr) of the store to increase sales and ensure efficiency. 2. Coordinate area-level activities with the entire organization's strategic policies. 3. Organize special promotions, displays and events.	A. Planning and coordination	30%	1. Knowledge of organizational policies and practices 2. Skill in judgment and decision making 3. Ability to think creatively and develop original solutions	4 5 4
4. Analyze sales figures and forecasting demand for future periods 5. Determine appropriate policies and procedures for inventory, purchasing, and personnel management in consultation with the store manager that will apply to the area of the store. 6. Ensure quality, customer service, and health and safety standards are met for the area. 7. Oversee the area's management of legal and security issues in coordination with the store manager.	B. Administration	40%	1. Knowledge of retail management policies and practices 2. Knowledge of legal precepts underlying personnel management 3. Skill in the analysis of financial and operational data 4. Ability to reason inductively	3 4 5 3
8. Chairing meetings with department managers. 9. Assess customer satisfaction to ensure appropriate customer service is being provided 10. Establish programs and training to ensure all employees are providing appropriate customer service	C. Supervision and leadership	30%	1. Knowledge of the customer base served by the store 2. Skill in managing personnel resources 3. Communication and speaking skills	4 4 5
<b>Job context:</b> Indoors, office, business clothes, mostly sitting and standing, no environmental or job hazards				

## Department Manager

Tasks			KSAOs	
Specific tasks	Task Dimensions	Importance (% time spent)	Nature	Importance to Tasks (1-5 rating)
<ol style="list-style-type: none"> <li>1. Manage the department to increase sales and ensure efficiency.</li> <li>2. Coordinate department activities with the store's policies, in consultation with assistant store manager.</li> <li>3. Implement special promotions, displays and events.</li> </ol>	A. Planning and coordination	30%	<ol style="list-style-type: none"> <li>1. Knowledge of organizational policies and practices</li> <li>2. Skill in judgment and decision making</li> <li>3. Ability to think develop original solutions within prescribed parameters</li> </ol>	<ol style="list-style-type: none"> <li>5</li> <li>3</li> <li>3</li> </ol>
<ol style="list-style-type: none"> <li>4. Analyze sales figures and forecast inventory needs for future periods</li> <li>5. Ensure quality, customer service, and health and safety standards are met for the department.</li> <li>6. Enforce safety, health, and security rules as directed by the assistant store manager.</li> <li>7. Inventory stock and reorder when inventory drops to a specified level.</li> </ol>	B. Administration	40%	<ol style="list-style-type: none"> <li>1. Knowledge of retail management policies and practices</li> <li>2. Knowledge of legal precepts underlying personnel management</li> <li>3. Skill in the analysis of financial and operational data</li> <li>4. Ability to reason inductively</li> </ol>	<ol style="list-style-type: none"> <li>4</li> <li>3</li> <li>3</li> <li>3</li> </ol>
<ol style="list-style-type: none"> <li>8. Attending meetings with store manager and assistant managers.</li> <li>9. Direct employees in sales, taking inventory, and performing services for customers</li> <li>10. Monitor departmental performance to ensure associates and shift leaders are providing appropriate customer service</li> <li>11. Direct store associates in their work activities</li> </ol>	B. Supervision and leadership	30%	<ol style="list-style-type: none"> <li>1. Knowledge of customer service principles</li> <li>2. Skill in managing personnel resources</li> <li>3. Communication and speaking skills</li> </ol>	<ol style="list-style-type: none"> <li>4</li> <li>3</li> <li>4</li> </ol>
<b>Job context:</b> Indoors, customer service environment, business clothes, sitting and standing, some walking				

## Shift Leader

Tasks			KSAOs	
Specific tasks	Task Dimensions	Importance (% time spent)	Nature	Importance to Tasks (1-5 rating)
<ol style="list-style-type: none"> <li>1. Greet customers and ascertain what each customer wants.</li> <li>2. Maintain knowledge of current sales and promotions.</li> <li>3. Provide recommendations or locate merchandise for customers.</li> <li>4. Answer questions regarding the store and its merchandise.</li> <li>5. Describe merchandise and its operation and care to customers.</li> </ol>	A. Customer service	40%	<ol style="list-style-type: none"> <li>1. Knowledge of customer service principles</li> <li>2. Knowledge of merchandise offered in the stores</li> <li>3. Communication and speaking skills</li> <li>4. Ability to relate to others</li> </ol>	<p>5</p> <p>4</p> <p>4</p>
<ol style="list-style-type: none"> <li>6. Continually monitor for and resolve security and theft problems</li> <li>7. Ticket, arrange and display merchandise to promote sales.</li> </ol>	B. Inventory control	20%	<ol style="list-style-type: none"> <li>1. Skill in organizing, combining, and documenting information</li> <li>2. Ability to perform light lifting and object manipulation</li> </ol>	<p>4</p> <p>4</p>
<ol style="list-style-type: none"> <li>8. Attending meetings with department managers.</li> <li>9. Direct employees in sales, taking inventory, and performing services for customers</li> <li>10. Ensure associates are providing appropriate customer service</li> </ol>	C. Supervision and leadership	40%	<ol style="list-style-type: none"> <li>1. Knowledge of customer service principles</li> <li>2. Skill in managing personnel resources</li> <li>3. Communication and speaking skills</li> </ol>	<p>4</p> <p>3</p> <p>4</p>
<p><b>Job context:</b> Indoors, customer service environment, business clothes, sitting and standing, some walking, some light lifting, minimal risk of injury from stocking shelves</p>				

**Store Associate**

Tasks			KSAOs	
Specific tasks	Task Dimensions	Importance (% time spent)	Nature	Importance to Tasks (1-5 rating)
1. Greet customers and ascertain what each customer wants. 2. Maintain knowledge of current sales and promotions. 3. Provide recommendations or locate merchandise for customers. 4. Answer questions regarding the store and its merchandise. 5. Describe merchandise and its operation and care to customers.	A. Customer service	70%	1. Knowledge of customer service principles 2. Knowledge of merchandise offered in the stores 3. Communication and speaking skills 4. Ability to relate to others	5  4  4
6. Continually monitor for and resolve security and theft problems 7. Ticket, arrange and display merchandise to promote sales.	B. Inventory control	30%	1. Skill in organizing, combining, and documenting information 2. Ability to perform light lifting and object manipulation	4  4
<b>Job context:</b> Indoors, customer service environment, business clothes, sitting and standing, some walking, some light lifting, minimal risk of injury from stocking shelves				

## APPENDIX B: RECRUITING YIELD DATA

	Western Washington			
	Applicant initiated	Referrals	Kiosk	Job service
Applicants	1400	3362	2963	4236
Candidates	536	1564	1315	1598
Hired	204	1026	652	378
6 month retention	124	819	502	310
1 year retention	92	703	358	284
Qualification rate	38%	47%	44%	38%
Hiring rate (# hired/# applicants)	15%	31%	22%	9%
6 month retention rate (6 mo. ret./# hired)	61%	80%	77%	82%
1 year retention rate (1 yr. ret./# hired)	45%	69%	55%	75%
Fixed costs				
Cost of setup (per site)	\$20,000.00	\$30,000.00	\$20,000.00	\$40,000.00
Number of locations	25	25	25	25
Cost of setup (per division)	\$250,000.00	\$250,000.00	\$1,000,000.00	\$250,000.00
Variable costs				
Materials cost per applicant	\$5.00	\$10.00	\$1.00	\$5.00
Processing cost per applicant	\$30.00	\$30.00	\$15.00	\$15.00
Additional pre-hire costs	\$20.00	\$200.00	\$20.00	\$0
Orientation and training	\$2,000.00	\$2,000.00	\$2,000.00	\$1,000.00
Total variable costs	\$461,080.00	\$2,391,680.00	\$1,364,448.00	\$462,720.00
Total cost	\$1,211,080.00	\$3,391,680.00	\$2,864,448.00	\$1,712,720.00
Cost per hire	\$5,936.67	\$3,305.73	\$4,393.33	\$4,531.01
Cost per 6 mo survival	\$9,766.77	\$4,141.25	\$5,706.07	\$5,524.90
Cost per 1 year survival	\$13,163.91	\$4,824.58	\$8,001.25	\$6,030.70

Eastern Washington				
	Applicant initiated	Referrals	Kiosk	
Applicants	4629	3936		2673
Candidates	1608	1720		1110
Hired	676	1016		435
6 month retention	446	894		342
1 year retention	307	732		284
Qualification rate	35%	44%		42%
Hiring rate (# hired/# applicants)	15%	26%		16%
6 month retention rate (6 mo. ret./# hired)	66%	88%		79%
1 year retention rate (1 yr. ret./# hired)	45%	72%		65%
Fixed costs				
Cost of setup (per site)	\$20,000.00	\$30,000.00		\$20,000.00
Number of locations	25	25		25
Cost of setup (per division)	\$250,000.00	\$250,000.00		\$1,000,000.00
Variable costs				
Materials cost per applicant	\$5.00	\$10.00		\$1.00
Processing cost per applicant	\$30.00	\$30.00		\$15.00
Additional pre-hire costs	\$20.00	\$200.00		\$20.00
Orientation and training	\$2,000.00	\$2,000.00		\$2,000.00
Total variable costs	\$1,527,535.00	\$2,392,640.00		\$921,468.00
Total cost	\$2,277,535.00	\$3,392,640.00		\$2,421,468.00
Cost per hire	\$3,369.13	\$3,339.21		\$5,566.59
Cost per 6 mo survival	\$5,106.58	\$3,794.90		\$7,080.32
Cost per 1 year survival	\$7,418.68	\$4,634.75		\$8,526.30

Northern Oregon				
	Applicant initiated	Kiosk	Agency	
Applicants	2616	3986	1290	
Candidates	1102	1110	614	
Hired	374	656	420	
6 month retention	218	342	416	
1 year retention	164	336	402	
Qualification rate	42%	28%	48%	
Hiring rate (# hired/# applicants)	14%	16%	33%	
6 month retention rate (6 mo. ret./# hired)	58%	52%	99%	
1 year retention rate (1 yr. ret./# hired)	44%	51%	96%	
Fixed costs				
Cost of setup (per site)	\$20,000.00	\$20,000.00	\$70,000.00	
Number of locations	18	18	18	
Cost of setup (per division)	\$250,000.00	\$1,000,000.00	\$250,000.00	
Variable costs				
Materials cost per applicant	\$5.00	\$1.00	\$10.00	
Processing cost per applicant	\$30.00	\$15.00	\$30.00	
Additional pre-hire costs	\$20.00	\$20.00	20	
Orientation and training	\$2,000.00	\$2,000.00	\$1,000.00	
Total variable costs	\$847,040.00	\$1,388,896.00	\$480,000.00	
Total cost	\$1,457,040.00	\$2,748,896.00	\$1,990,000.00	
Cost per hire	\$3,895.83	\$4,190.39	\$4,738.10	
Cost per 6 mo survival	\$6,683.67	\$8,037.71	\$4,783.65	
Cost per 1 year survival	\$8,884.39	\$8,181.24	\$4,950.25	



Southern Oregon				
	Applicant initiated	Kiosk	Agency	
Applicants	1248	2730	1129	
Candidates	610	866	522	
Hired	396	346	386	
6 month retention	316	256	364	
1 year retention	290	216	326	
Qualification rate	49%	32%	46%	
Hiring rate (# hired/# applicants)	32%	13%	34%	
6 month retention rate (6 mo. ret./# hired)	80%	74%	94%	
1 year retention rate (1 yr. ret./# hired)	73%	62%	84%	
Fixed costs				
Cost of setup (per site)	\$30,000.00	\$20,000.00	\$70,000.00	
Number of locations	16	16	16	
Cost of setup (per division)	\$250,000.00	\$1,000,000.00	\$250,000.00	
Variable costs				
Materials cost per applicant	\$10.00	\$1.00	\$10.00	
Processing cost per applicant	\$30.00	\$15.00	\$30.00	
Additional pre-hire costs	\$200.00	\$20.00	20	
Orientation and training	\$2,000.00	\$2,000.00	\$1,000.00	
Total variable costs	\$921,120.00	\$742,600.00	\$438,880.00	
Total cost	\$1,651,120.00	\$2,062,600.00	\$1,808,880.00	
Cost per hire	\$4,169.49	\$5,961.27	\$4,686.22	
Cost per 6 mo survival	\$5,225.06	\$8,057.03	\$4,969.45	
Cost per 1 year survival	\$5,693.52	\$9,549.07	\$5,548.71	

## **APPENDIX C: SELECTION MEASURES**

The selection measures employed by Tanglewood Department Stores are described in the following pages.

Tanglewood Department Stores Application Form

\_\_\_\_\_  
LAST name

\_\_\_\_\_  
FIRST name

\_\_\_\_\_  
Middle

**Date of application:**

\_\_\_\_\_  
Month

\_\_\_\_\_  
Day

\_\_\_\_\_  
Year

**Date on which you can start work:**

\_\_\_\_\_  
Month

\_\_\_\_\_  
Day

\_\_\_\_\_  
Year

**Contact information:**

\_\_\_\_\_  
Street or route

\_\_\_\_\_  
City

\_\_\_\_\_  
State and ZIP Code

\_\_\_\_\_  
(\_\_\_\_\_)\_\_\_\_\_  
Home phone number

\_\_\_\_\_  
(\_\_\_\_\_)\_\_\_\_\_  
Alternative phone number

\_\_\_\_\_  
e-mail address

Position for which you are applying: \_\_\_\_\_

If hired, can you furnish proof that you are eligible to work in the United States? Yes    No

Have you ever been convicted of a felony? Yes    No

If yes, please explain: \_\_\_\_\_

**Education history**

	School, city, and state	Date started	Date finished	Did you graduate?	Degree received	Field of study
GED						
High school						
College						
Business/trade school						
Graduate						

**Employment history**

Company name	Job title	Primary duties	Dates employed	Reason for leaving

Tanglewood Department Stores is an Equal Employment Opportunity Employer. It is our policy to maintain and promote nondiscrimination regarding race, color, creed, national origin, military service, age, and sexual orientation in all of our employment practices.

*Tanglewood Department Stores Interview Form*

\_\_\_\_\_  
Candidate last name

\_\_\_\_\_  
First name

\_\_\_\_\_  
Middle

Position applied for: \_\_\_\_\_

**Topic areas for interview (check each area as it is covered):**

Does applicant have experience working in a group or team setting?

Does applicant feel comfortable working in a participative environment like Tanglewood?

Does applicant understand the organization's mission and values?

Does applicant have a clear understanding of what the position will entail?

Does applicant have some knowledge of the camping and outdoor goods market?

Does applicant understand basic principles of providing customer service?

Is applicant available to work scheduled shift hours?

**Applicant suitability for position:**

Very suitable for position; strong recommendation for hire

Suitable for position; recommended for hire

Not recommended for hire

Comments regarding interview:

**Please *print* your name below:**

\_\_\_\_\_  
Interviewer last name

\_\_\_\_\_  
First name

\_\_\_\_\_  
Middle

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

*Marshfield Applicant Exam*

<p>1. If David can ride his bicycle 2 miles in 5 minutes, how many miles can he ride his bicycle in 10 minutes?</p> <p>a. 10 miles b. 4 miles c. 7 miles d. none of the above</p>	<p>2. Loretta does not want to sit next to Olivia in the car. Francis will not sit in the front seat, and also does not want to sit next to Greg. Greg wants to sit in the back seat. Who will sit in the front seat?</p> <p>a. Loretta and Greg b. Olivia and Greg c. Loretta and Olivia d. Loretta and Francis</p>
<p>3. SNAKE is to SLITHER as:</p> <p>a. CHICKEN is to FLY b. FLY is to SPARROW c. DOG is to CAT d. DUCK is to FLY</p>	<p>4. Which of the following number sequences do not contain identical numbers?</p> <p>a. 008474 008374 b. 745637 745637 c. 291183 291183 d. 556472 556472</p>
<p>5. Steve is selling shirts for \$14.75. If Dominic gives Steve a \$20 bill for a shirt, how much change should Steve give him back?</p> <p>a. \$6.25 b. \$4.25 c. \$5.25 d. \$3.50</p>	<p>6. There are five pizzas with eight slices each that have to be evenly divided among 10 people. How many pieces of pizza will each person receive?</p> <p>a. 5 and 4/5 b. 5 c. 3 and 1/2 d. 4</p>
<p>7. ATLANTIC is to OCEAN as:</p> <p>a. INDIAN is to SEA b. VINEGAR is to OIL c. CHEDDAR is to CHEESE d. FRANCE is to CONTINENT</p>	<p>8. Which of the following words is spelled incorrectly?</p> <p>a. Fiduciary b. Forefit c. Complexity d. Renaissance</p>
<p>9. Four people are standing in line for movie tickets. Noah is next to Lynn. Jan is not last, and is not next to Lynn. Tom is not next to Lynn. Lynn is after (but not next to) Jan. What is the order of these people?</p> <p>a. Tom-Jan-Lynn-Noah b. Tom-Lynn-Noah-Jan c. Jan-Tom-Noah-Lynn d. Lynn-Jan-Tom-Noah</p>	<p>10. Paramount city is 100 miles west of Nadir city. One train leaves Paramount city traveling east at 40 miles per hour. Another train leaves Nadir city traveling west at 60 miles per hour. How much time will it pass before the trains meet?</p> <p>a. 1/2 hour b. 1 hour c. 2 hours d. Never; they're going the wrong way</p>

*Sample Questions from the Personality Questionnaire*

Directions:

For each of the following items, describe how well they apply to use on a scale from 1=this is not a good description of me to 5=this is an excellent description of me.

***Extraversion***

- \_\_\_\_\_ I enjoy seeing people at parties.
- \_\_\_\_\_ I find talking to new people very comfortable.
- \_\_\_\_\_ I seldom feel apprehensive in social settings.
- \_\_\_\_\_ I prefer to be around other people when I can.
- \_\_\_\_\_ Starting conversations is very easy for me.
- \_\_\_\_\_ When in groups, I often am the center of attention.
- \_\_\_\_\_ People tell me that I tend to talk frequently.
- \_\_\_\_\_ I think that it's fun to meet new people.
- \_\_\_\_\_ I would generally say that I have a large circle of friends and acquaintances.
- \_\_\_\_\_ I like to speak up in classes and other group situations.

***Conscientiousness***

- \_\_\_\_\_ I am a highly detailed person.
- \_\_\_\_\_ I meet my commitments in life, and follow through on what is asked of me.
- \_\_\_\_\_ I consistently set goals for myself and complete them.
- \_\_\_\_\_ I prefer a well-ordered schedule to doing things in a random order.
- \_\_\_\_\_ I always make sure I do my part in work, and put in extra effort when needed.
- \_\_\_\_\_ It is rare for me to be disorganized or messy.
- \_\_\_\_\_ I keep very close watch on how much money is in my checking account.
- \_\_\_\_\_ I like to sort things so everything is in the right place.
- \_\_\_\_\_ It is important for people to contribute to the groups they belong to.
- \_\_\_\_\_ I always get right to work.
- \_\_\_\_\_ If I start something you can bet it will be finished.

*Sample Questions from the Marshfield Biodata Questionnaire and Essay*

**Directions for Biodata essay:**

Most people find that they experience situations that lead them to feel like they were under pressure. We would like to know about a specific situation in which you felt like there was a great deal to do, and not enough time or resources to complete the project. Try to answer the following questions in your description:

1. What expectations were placed on you?
2. What about the situation was the most stressful for you?
3. What did you do to alleviate your stress?
4. What did you learn from this situation?

**Examples of other items. All are responded to on a 5-point “very often” to “never” scale:**

1. How often have you been too embarrassed to ask someone for help with a project at school, even though you really needed it?
2. How often has have you felt like others were free-riding on your efforts?
3. How often have you confronted a co-worker or classmate who did not do enough of the work for a group project?
4. How often have you had to persuade someone to change his or her mind?
5. How often have you taken action to “get even” with a co-worker who did something unfair to you?
6. How often do you feel like it would be better to let others do all the work in a project group because you had other, more pressing, job or school demands?
7. How often have you worked in a group or some activity where teamwork was the only way anything could be achieved?
8. How often have you appealed a grade from a class or a rating on a performance appraisal form?
9. How often were you been in a position of leadership in school or extracurricular activities?



*Retail Market Knowledge Test*

*The following test has been designed by the Tanglewood Corporation to examine how well potential associates understand the retail market and Tanglewood's unique role in the market. These are only a sample of the items on the test.*

**A. List the top five retail marketing firms (in terms of total revenues) in the United States.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**B. How many Tanglewood store locations are there in the United States? \_\_\_\_\_**

**C. Which of the following stores has a retail market niche most like Tanglewood?**

1. Gander Mountain
2. Target
3. JC Penny
4. Macy's
5. More than one of the above

**D. Which of the following is *not* an advantage of carrying in-house brands?**

1. Reduced requirement for price bargaining
2. The ability to set prices relative to other brands
3. In-house brands are less expensive to advertise
4. In-house brands can build up a customer base that is more loyal
5. All of the above are advantages to in-house brands

**E. Which of the following statements is true?**

1. Older shoppers are as likely as younger shoppers to switch brands
2. Shoppers prefer products advertised with attractive models compared to models that "look like the average person"
3. Highly involved shoppers are no more likely to be convinced by rational appeals than shoppers in general
4. The use of celebrities in advertising is an attempt to improve shoppers identification compliance with the marketing message

## APPENDIX D: INDIVIDUAL APPLICANT INFORMATION

	Biodata	Applicant exam	Retail Knowledge	Conscientiousness	Extraversion
Andrews, David	70	45	65	75	70
Greer, Shauna	60	65	70	50	90
Renoir, Maxine	80	60	40	90	80
Binghome, Bruce	60	55	80	65	55
Yorn, John	40	80	45	60	60
Thomas, Mindy	75	40	30	80	75
Vacarri, Brenda	55	35	45	60	75
Reznor, Thomas	65	90	60	70	80
Durvall, Adam	60	60	55	50	65
Heckman, Jane	85	55	60	90	90
Corporate Average	50	50	50	50	50
Managerial average	60	60	65	55	70

# DAVID ANDREWS

## OBJECTIVE

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To obtain a position emphasizing management in a major retail organization that will enable me to combine my love of the outdoors and camping with a profitable career.

## EXPERIENCE

---

2010–2015      Northumberland Camping      Phoenix, AZ

*National Sales Manager*

- Increased national sales from \$50 million to \$100 million.
- Doubled sales per representative from \$5 million to \$10 million.
- Suggested new products that increased earnings by 23%.

2003–2009      Northumberland Camping      Phoenix, AZ

*District Sales Manager*

- Increased district sales from \$5 million to \$10 million.
- Managed 50 sales representatives in 10 Western states.
- Implemented training course for new recruits — speeding profitability.

2001–2002      Barkole Woods Supply      Flagstaff, AZ

*Marketing Intern*

- Developed skills in marketing a wide variety of outdoor goods.
- Worker with senior marketing managers on developing new products.
- Performed several direct sales calls.

## EDUCATION

---

1987–1991      Northern Arizona University      Flagstaff, AZ

- B.A., Business Administration (Marketing Focus).
- Participated in orientation club

2002–2004      University of Phoenix

- M.B.A. with a concentration in marketing

## INTERESTS

---

Running, gardening, carpentry, computers.

# SHAUNA GREER

## OBJECTIVE

---

I have a real passion for retail, and a real love for corporate management. I want to find a position that helps me combine these interests and gain some managerial experiences. Although I have not worked extensively in a corporate managerial capacity in the past, I believe that my combination of very strong organizational skills as well as my general “people aptitude” will make me an excellent leader. My previous work as an assistant manager at the Tanglewood flagship store in Spokane clearly indicates my aptitude for this work.

## EXPERIENCE

---

2001–2015      Tanglewood      Spokane, WA

*Assistant Store Manager for Hardlines*

Aided the store manager in developing new promotions.

Oversaw much of the work in the store’s hardlines area.

Conducted bi-annual focus groups with representatives of the community.

Managed an operating budget with no overages.

1996–2001      Ferguson and Bardwell      South Ridge, WA

*Shoe department manager*

Directed a sales force of 30 shoe salespeople.

Managed all aspects of sales displays.

Developed contacts with local newspapers for advertising.

Received consistent excellent performance reviews from supervisors.

## EDUCATION

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1992–1995      University of Illinois      Champaign-Urbana, IL

B.A., Business Administration and Computer Science.

Graduated *summa cum laude*.

## INTERESTS

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Anything that has to do with retail is a strong interest for me. I have run in the Chicago and Minneapolis marathons for several years.

# MAXINE RENOIR

OBJECTIVE  
\_\_\_\_\_ To continue my current career progress towards maximizing my potential in the field of retail management.

EXPERIENCE  
\_\_\_\_\_ 2009–2015 Tanglewood Department Stores Denver, CO  
*Store Manager*

- Motivated a diverse workforce to expand our sales base.
- Managed a change process that restructured the workforce completely.
- Personally supervised during a period of rapid sales growth.

2007–2008 Macy's Philadelphia, PA  
*District Sales Manager*

- Presided over the developed of a new department store.
- Managed 20 department stores sales promotions and marketing efforts
- Individually implemented methods to decrease labor costs 30%

2001–2006 Tanglewood Department Stores Portland, OR  
*Senior Sales Representative*

- Achieved record sales in the outdoor apparel division
- Reduced overhead for warehouses, cutting costs by 15%

1996–1998 Evenflo Products South Ridge, SC  
*Sales Representative*

- Established a new sales area by partnering with area grocers
- Increased sales by 10% through individual effort

EDUCATION  
\_\_\_\_\_ 1992–1996 Vanderbilt University Nashville, TN  
B.A., Business Administration and Computer Science.

M.B.A. Boston University

## Bruce Bingham

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<b>Objective</b>	I consider myself an active, go-getting type of person who loves to go for the gold in everything I do. This enthusiasm is a huge part of how I approach my current search for a job in the area of apparel marketing and promotions.
<b>Experience</b>	<p>Store Manager 2003-2015. Tanglewood</p> <ul style="list-style-type: none"><li>▪ Managed a \$10 million annual budget</li><li>▪ Increased annual sales for two product lines by over 50%</li><li>▪ Worked closely on promoting the "lighter side of Sears" project</li></ul> <p>Corporate Manager 1996-2010 Benson and Stabler Retailing</p> <ul style="list-style-type: none"><li>▪ Initiated internet direct sales approach</li><li>▪ Oversaw the expansion of the company into 30% more locations</li><li>▪ Worked with marketing team to develop new website design</li></ul> <p>Marketing Representative 1988-1996 Distance Couriers, New York City, NY</p> <ul style="list-style-type: none"><li>▪ Secured major contracts with several brokerage houses</li><li>▪ Initiated direct marketing system that cut distribution costs 30%</li><li>▪ Developed plans for increasing sales base by 75%</li></ul> <p>Salesperson 1985-1988 Airplex Designs, San Diego, CA</p> <ul style="list-style-type: none"><li>▪ Sold aluminum gliders through direct contact with clients</li><li>▪ Earned over \$250,000 per year in revenue</li><li>▪ Managed three interns</li></ul>
<b>Education</b>	<p>Boston College 1981-1985</p> <ul style="list-style-type: none"><li>▪ B.A. in Anthropology</li><li>▪ Graduated <i>magna cum laude</i></li></ul>
<b>Interests</b>	I am an amateur actor and perform Shakespeare In the Park
<b>References</b>	References are available on request.

**john yorn**

### **objective and strengths**

i want to accomplish a new vision for athletic footwear. innovation is central to my way of life and goals. unlike most marketing professionals, i have a diverse background that helps me really expand beyond the traditional parameters of the marketing function.

### **professional profile**

#### ***krtg systems advertising manager 2013-2015***

- i completely revised the way krtg marketed their corporate employee monitoring software. in the past, they sold direct to corporations they worked with. under my direction, they changed this practice by bundling their software with network server utilities. this led to a nearly 30% increase in sales in an otherwise depressed market.

#### ***books-a-million promotions manager 2011-2013***

- i performed extensive research into cross-product marketing such as combining book promotions with t-shirts, beverages, food items, board games, etc. in addition, i developed display concepts for the stores.

#### ***corporate giving liaison, make-a-wish 2009-2011***

- in this position i established relationships with large corporations' corporate giving departments in order to raise funds. in this position i was able to develop my skills within a corporate setting, which was very new to me.

#### ***personal assistant to mr. adam horowitz 2008-2009***

- in this rather unusual position, i primarily scoured athletic equipment stores and second-hand boutiques to find vintage athletic gear for mr. horowitz.

#### ***aaron's suds and suds laundromat manager 2007***

- this position was my first opportunity to manage others

### **Education**

new york university, graduated in 2004

- degree in humanities
- dual minor in women's studies and jazz performance

# MINDY THOMAS

## OBJECTIVE

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I am seeking a position with managerial responsibility and room for advancement.

## EXPERIENCE

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2007–2015      Redwood Oaks Mall      Vancouver, Canada

*Mall manager*

- Facilitated interactions with store owners and ensured adequate consumer traffic in the stores
- Developed plans for marketing to a more diverse client base.
- Managed a \$15 million annual budget

1998-2006      New Brunswick YMCA      New Brunswick, Canada

*Multi-site manager*

- Managed all aspects of three different YMCA sites.
- Accountable for approximately 200 full-time staff.

1993-1996      Tangerine Dream Tanning Salon      Spokane, WA

*Entrepreneur*

- Started up new business with capital earned through investors.
- Coordinated all aspects of marketing, promoting, and advertising the salon.
- Sold business at a 800% profit over original expenditures.

## EDUCATION

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1991–1996      Gonzaga College      Spokane, WA

- B.A., Business Administration.

1996–1997      Cornell University      Ithaca, NY

- Master of Arts in Labor and Industrial Relations.

## INTERESTS

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Exercise, long-distance running, history, poetry.



# BRENDA VACARRI

## OBJECTIVE

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To increase my experience in the area of management. While I have worked only for one company in my professional career, I am ready for a change. I also believe this experience is especially good for an organization like Tanglewood that should be constantly striving to understand the outdoor market niche.

## EXPERIENCE

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2001–2015 Hudson River Outdoors

### *Store Manager*

- Managed communications with multiple outdoor product manufacturers requiring frequent interaction and conflict management skills
- Coordinated local area product fairs and display opportunities
- Engaged in the process of reviewing and selecting employees
- Supervised a staff of 80-90 employees
- Managed budgets, prepared reports for the board of directors
- Worked cooperatively with multiple constituents, including regional outdoors companies, retailers, and product development specialists
- Oversaw the development of several house brands of merchandise for the outdoor market, including tents, sleeping bags, and camp stoves

## EDUCATION

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1997–2001 Guelph University

B.A., English literature.

## INTERESTS

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I am a great lover of people and find the process of understanding human beings endlessly fascinating.

# THOMAS REZNOR

<u>OBJECTIVE</u>	Obtaining a rewarding career that allows me to exercise my knowledge of retail management in a growth-oriented environment.	
<u>EXPERIENCE</u>	2009–2015	Tanglewood department stores Seattle, WA <i>Northwest Region Sales Director</i> Increased sales for the region by 45%. Doubled sales per store in troubled markets. Suggested new products that increased earnings by 23%.
	2007–2009	Johnson and Johnson New York, NY <i>Marketing Manager, Animal Health Division</i> Supervised expansion into several Asian markets Oversaw a 40% increase in sales in the Asian division Managed a campaign to increase internet advertising to physicians
	2001–2004	Interwebz Palo Alto, CA <i>Corporate sales manager</i> Participated in firm's initial rollout of the Interwebz search tool Oversaw massive expansion of product through internet marketing
	1997–2001	Microsoft Redmond, WA <i>Information Systems Manager</i> Developed code for components of the Windows 3.1 system Performed preliminary research on using internet applications
<u>EDUCATION</u>	1993–1997	Harvard University B.A., Computer Science.
	2004–2007	New York University M.B.A., Marketing Focus
<u>INTERESTS</u>	Web programming, mathematics, philosophy.	

# Adam Durvall

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<b>Objective</b>	Increasing my experience in the field of management.
<b>Experience</b>	<p>Sales Manager 2004-2015 Davidson Stores</p> <ul style="list-style-type: none"><li>▪ Capitalized on knowledge of retail in a new position</li><li>▪ Interacted with direct salespeople in several department stores</li><li>▪ Completed courses in marketing fundamentals</li></ul> <p>Sales Associate 1992-2004 Davidson Stores</p> <ul style="list-style-type: none"><li>▪ Directly interacted with customer focus groups</li><li>▪ Learned about the retail market and advertising</li><li>▪ Engaged in extensive international market research</li></ul> <p>Marketing Manager 1984-1992 Dairymatch Creamers</p> <ul style="list-style-type: none"><li>▪ Increased expertise related to management techniques</li><li>▪ Became versed in the cheese market</li><li>▪ Helped incorporate changes in product design, including more string cheese and cheese curds</li></ul> <p>Sales Support 1976-1984 IBM</p> <ul style="list-style-type: none"><li>▪ Facilitated repeat business contacts</li><li>▪ Interacted extensively with end-users in corporations</li><li>▪ Developed knowledge of the computer mainframe market</li></ul>
<b>References</b>	References are available on request.

# JANE HECKMAN

## OBJECTIVE

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Working actively in the field of retail forecasting at the Tanglewood Corporation. I will accomplish this goal!

## EXPERIENCE

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2007–2015      Tanglewood Department Stores      Seattle, WA

*Assistant Manager*

- Actively participated in upper management decisions
- Assessed the need for many products and services, and made suggestions for improvement whenever possible
- Spearheaded an effort to reduce accident rates

2004–2007      Tanglewood Department Stores      Seattle, WA

*Department Manager*

- Lead a dynamic team of individuals to solve business problems
- Developed strong knowledge of retail sales market through extensive product research
- Collaborated with other department managers to create positive cross-functional business synergy

1997–2004      Tanglewood Department Stores      Seattle, WA

*Sales Associate/Shift Leader*

- Maintained a positive environment on the sales floor
- Ensured merchandise was stocked and tastefully displayed
- Made suggestions to improve the store's appearance and function

## EDUCATION

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1993–1997      University of Washington      Seattle, WA

B.A., Business Administration and History.

## INTERESTS

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Gardening, taking care of my beautiful Collie Sandy, and bird watching.

Subject	Notes
Andrews, David	<ul style="list-style-type: none"> <li>• Always looked up to Tanglewood when working in the camping industry, wants to make the switch to general retail management</li> <li>• Believes that his experiences will help him set up the flagship store as the number one outlet for camping goods and other outdoors products in the western U.S., and that this will help all the stores achieve new and better returns</li> <li>• Admitted the experience of running a store would be a new challenge, but he felt it was something he could handle</li> </ul>
Greer, Shauna	<ul style="list-style-type: none"> <li>• Described herself as dedicated, loyal, and ambitious</li> <li>• Wanted to use the management of the flagship as a way to work into the central corporate function, because she believes she has executive potential</li> <li>• Feels that her experiences within Tanglewood have taught her to “grab the brass ring,” meaning that she thinks she needs to make things happen rather than waiting for change.</li> </ul>
Renoir, Maxine	<ul style="list-style-type: none"> <li>• Believes that her combined experience both within Tanglewood and outside Tanglewood make her an especially good candidate</li> <li>• Her experience taught her the importance of securing a unique market segment and really concentrating your efforts in that market</li> <li>• Described managing the flagship store as a “dream job”</li> </ul>
Binghome, Bruce	<ul style="list-style-type: none"> <li>• Reported that he had a very positive experience with Tanglewood and believes that he is an excellent fit for the company’s culture</li> <li>• Said that his desire to switch locations was based primarily on the opportunities that the flagship location seemed like the best place for an achievement oriented manager in Tanglewood to go</li> <li>• Was especially interested in the opportunity to engage in promotional work, which he hasn’t been able to do as much as he’d like</li> </ul>
Yorn, John	<ul style="list-style-type: none"> <li>• Described himself as a maverick and freethinker who could shake things up for Tanglewood</li> <li>• Explained how the current business model for Tanglewood could be enhanced by merging the outdoors theme with a technological theme</li> <li>• Said that although his experience was unusual for a position like a retail store manager, he knew that he could accomplish great things within Tanglewood</li> </ul>
Thomas, Mindy	<ul style="list-style-type: none"> <li>• Said she was ready for a change to standard retail management after years of working as a coordinator</li> <li>• Especially felt that her people skills were not being adequately utilized in his old position, and said “I really do manage people well.”</li> <li>• Said that it would be exciting to manage someplace like the flagship for such a major retail presence</li> </ul>
Vacarri, Brenda	<ul style="list-style-type: none"> <li>• Felt that Tanglewood was a great career option because her current employer provided her with no further opportunities for growth</li> <li>• Described the Tanglewood corporate culture as “organic, people focused, and open to new possibilities”</li> <li>• Described former employer in positive terms; said she was sorry to go but needed new opportunities</li> </ul>
Reznor, Thomas	<ul style="list-style-type: none"> <li>• Explained his switch from marketing positions: wants to be closer to the actual sales environment and focus less on creating advertising information</li> <li>• Believes his marketing background is actually a strength, because he has ideas for how to improve the presence of Tanglewood’s flagship store as a marketing tool</li> <li>• Expressed optimism about the company’s future and said he was eager to get to work</li> </ul>
Durvall, Adam	<ul style="list-style-type: none"> <li>• Described how his experience with another organization makes him a strong choice for future management efforts</li> <li>• Said that Tanglewood really needed to work harder to reduce prices and dedicate more floor space to impulse items</li> <li>• Provided suggestions for how to reach new markets of discount shoppers</li> </ul>
Heckman, Jane	<ul style="list-style-type: none"> <li>• Expressed strong interest in remaining with Tanglewood because she found it the most dynamic environment possible.</li> <li>• Described corporate culture as achievement oriented, team focused, and growth striving</li> <li>• Believed her dedication and long service in the company make her uniquely qualified</li> </ul>

# APPENDIX E: EMPLOYEE SATISFACTION SURVEY

As you know, the Tanglewood team is dedicated to ensuring that all of our associates and managers have opportunities to express their opinions regarding store operations. In an effort to better assess the quality of work life for our associates and managers across the entire chain, Tanglewood's corporate offices are distributing the following annual satisfaction survey to all of our employees. If you could take ten minutes to complete the following items and mail the survey back to the central office, we would very much appreciate it.

We do want to know where you work so we can compare your results to others who work at the same location, but your individual responses will be kept confidential. We do not want you to report your name.

Store location : \_\_\_\_\_  
 Job title : \_\_\_\_\_  
 Store location : \_\_\_\_\_

For each of the following questions, check the box that best describes your feelings:

	Strongly disagree (5)	Disagree (4)	Neutral (3)	Agree (2)	Strongly agree (1)
1. The work that I do at Tanglewood is interesting and enjoyable to me.					
2. I look forward to doing my job most of the time.					
3. My supervisor has done a good job of showing me how to do my job.					
4. I trust my supervisor and think he/she does a good job.					
3. I think that they system for paying employees is basically fair.					
4. The compensation I receive for my work is satisfactory.					
5. The health benefits at Tanglewood are adequate.					
6. I think that Tanglewood provides employees with great benefits.					