

The University of Western Ontario
Management and Organizational Studies

MOS 3383B 001
Strategic Human Resources Planning
Classroom: SSC 3102 (Fridays, 12:30 – 3:30 p.m.)

Course Outline
January – April 2010

Professor: Jody Merritt, DBA (ABD), MBA, CHRP
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Office Hours: By appointment
Phone: 661-2111 Ext. 82750
Course Website: <http://owl.uwo.ca>

COURSE DESCRIPTION AND OBJECTIVES:

An introduction to human resources planning processes in organizations. Topics include: supply and demand forecasting, succession management, job analyzes, downsizing and restructuring, mergers and acquisitions. This course is designed to provide students with an appreciation for the need for sound planning in human resources. The course will begin with an understanding of jobs using job analyzes and then progress through planning for vacancies and assessing how the vacancies will be filled in the future.

Prerequisite: Enrollment in third or fourth year of the BACS/BMOS program. Senate regulations state: “unless you have either the requisites for this course or written special permission from your Dean to enroll in it, you will be removed from this course and it will be deleted from your record. This decision may not be appealed. You will receive no adjustment to your fees in the event that you are dropped from a course for failing to have the necessary prerequisites.”

TEXTBOOK:

Belcourt, M. & McBey, K. (2010); “Strategic Human Resources Planning, Fourth Edition. Nelson Thomson Learning, ISBN: 0-17-650132-0. Additional readings will be assigned from time to time.

EVALUATION:

Midterm #1	25%	(Friday, Jan. 29/10 Room TBA, 12:30 – 2:30 p.m.)
Midterm #2	25%	(Friday, Feb. 26/10 Room TBA, 12:30 – 2:30 p.m.)
Final Exam	35%	(April Exam Period – Room and Date TBA)
Term Project	<u>15%</u>	(See Term Project Section)
Total	100%	

Format of Midterm/Final: The midterm and final will be made up of multiple choice questions and will be scheduled for two hours. They will cover the chapters indicated only including lectures and any supplementary assigned readings and are closed book. Students are responsible for material covered in the lectures as well as the assigned chapters in the text.

Students are required to complete all components of this course. There are no exceptions to this. Extra assignments to improve grades will not be allowed. Students must bring identification to the midterm and final. Nothing is to be on/at one's desk during an exam except writing instruments.

Late Penalties: Late submissions will not be accepted.

TERM PROJECT (Human Resource System Evaluation):

In groups of 5 people, you will identify a real organization and receive permission from management to study the organization. Once permission is received, your group will arrange to interview as many of the following as possible: the executive in charge of human resource management; employees performing human resource management functions; employees performing different functions at different levels in the organization; and labour union officials (if any). The study will focus on the selected organization's human resources and employee relations objectives, structures, policies, practices and selected administrative problems. It will give you the opportunity to learn firsthand about the management of a human resource system in actual organizations. It will also provide you with the opportunity to develop field research methodologies and evaluation skills that should prove beneficial in professional assignments. Finally, for the organization cooperating with each of the student projects, the results of these studies should be helpful in future efforts to improve the efficiency and effectiveness of its human resource systems.

The final product of this study will be a **comprehensive group presentation to be conducted on the dates indicated on the syllabus at the end of the term.** Each of you should assume the stance of an outside consultant who has been called in to evaluate the human resource system of the particular organization. Draw on the text, course material and outside sources (**at minimum 10 sources**) to answer the following questions and provide your overall recommendations. At a minimum, the **powerpoint presentation must be 40 minutes in duration and contain 30-35 powerpoint slides including the reference slide at the conclusion of your presentation of all sources used** and must reflect the items contained in the evaluation guide that follows. **A hardcopy of your powerpoint slides must be provided to the Professor prior to the start of your presentation.**

Evaluation Guide (410 marks)

A. Introduction (10)

B. The Organization and Its Mission (40)

1. When and why was this organization established?
 - a. Under what statutory or legal authority was it created?
 - b. What are the principal needs and objectives that the organization is designed to fulfill?
2. What are the structural components of the organization?
 - a. How is the organization structured to carry out its objectives?
 - b. Where is the focus of decision-making authority for carrying out these objectives?

- c. How centralized or decentralized is the decision-making process with respect to: Organizational planning? Operational management?
- d. What is the relationship between the leadership of this organization and;
 - i. Elected public officials? Other public officials?
 - ii. Leaders in the private sector?
 - iii. Representatives of employee organizations or associations, if any?
 - iv. Professional and technical staff?
- 3. What budgetary constraints confront the organization?
- 4. What is the total number of employees in the organization?
 - a. How are these employees distributed throughout the organization?
 - b. Does the organization operate overseas?
 - c. What are the major problems and opportunities confronting this organization? Up to this point, how has the organization responded to these challenges?
 - d. Does the organization have a strategic management plan, including goals, objectives and timetables?
 - e. What recommendations do you have for the organization (if any) for any problems you have identified in this area, and what effect do you believe these recommendations will have if implemented?

C. The Role of the Human Resource Function (100)

- 1. Does this organization have a formal and identifiable human resource function (department)?
- 2. When was this department formally established and why?
- 3. How is the human resource department organized to carry out the objectives of the organization?
- 4. How many individuals are directly associated with the human resource function or department?
- 5. What are the academic and employment backgrounds of those involved in the function or department?
- 6. If there is no formal and identifiable human resource function (department), why, and how are human resource functions carried out?
- 7. Where is the decision-making authority for human resource matters located within the company?
- 8. To what degree has the human resource function used information technology to manage information?
- 9. What is the perceived importance within the organization of the human resource function, in comparison to other organizational functions?
- 10. What recommendations do you have for the organization (if any) for any problems you have identified in this area, and what effect do you believe these recommendations will have if implemented?

D. Employment Decisions (40)

- 1. To what degree is human resource management integrated into the strategic management of the organization? How is it integrated?
- 2. Who is responsible for human resource planning and forecasting for the organization?
 - a. What methods are used to determine staffing needs?
 - b. Are job analyses conducted and job descriptions developed for each position in the organization? How often are they updated and how extensively?
- 3. Once staffing needs are established, what procedures are utilized for filling job vacancies?

4. What recommendations do you have for the organization (if any) for any problems you have identified in this area, and what effect do you believe these recommendations will have if implemented?

E. Determination of Working Conditions and Rewards (70)

1. Is an occupational classification system utilized by the organization?
2. How are wage/salary levels and annual improvements determined?
3. What methods are used for evaluating employees for the purpose of determining their effectiveness and/or awarding any salary increases?
4. What non-wage benefits are available?
5. Has the organization introduced any special programs or activities to improve health and safety conditions on the job?
6. What does the company do to maintain or improve employee morale and job satisfaction?
7. What recommendations do you have for the organization (if any) for any problems you have identified in this area, and what effect do you believe these recommendations will have if implemented?

F. Employee Training and Development (60)

1. Has the organization supported programs for employee training and development? Why or why not?
2. How do these programs relate to the organization's strategic and operational objectives?
3. Does the organization maintain its own training staff, or are outside organizations, individuals or programs used for training purposes?
4. Does the organization provide any incentives for employees to undertake job-related training and development activities supported by the organization?
5. To what extent has an employee's participation in the organization's training and development programs been used in making decisions related to promotions and transfers within the organization?
6. What recommendations do you have for the organization (if any) for any problems you have identified in this area, and what effect do you believe these recommendations will have if implemented?

G. Employee Frictions (50)

1. What methods and procedures are available for resolving employee complaints and grievances?
2. Have there been many employee discipline problems?
3. To what extent have employee tardiness, absenteeism, and turnover been problems?
4. How would the relationship between the management and the union be characterized?
5. What recommendations do you have for the organization (if any) for any problems you have identified in this area, and what effect do you believe these recommendations will have if implemented?

H. Summary and Evaluation (40)

1. Is the human resource function of this organization contributing to the fulfillment of the organization's mission, objective and strategic plan? Is it making an effective contribution? Why or why not?
2. What human resource management problems have been adequately solved or are now in the process of being solved by the organization?
3. Are there major management problems that remain to be confronted or solved? If so, what are they?

4. What would appear to be among the most desirable solutions to these problems? Provide specific detail and justification for your recommendations.

Additional Evaluation Criteria (70 marks)

- A. Creativity (10)
- B. Professionalism (10)
- C. Organization (10)
- D. Team Presence – **All Members in the Group Must Present** (10)
- E. Use of outside research sources – **At Minimum 10 Outside Sources Must Be Used** (10)
- F. Peer results from group utilizing peer form given by Professor (10)
- G. Group Code of Conduct (10)

Additional Term Project Requirements:

1. A final team must be created and communicated through the course website assignments link to the Professor by **January 29/10 at midnight**. Included in this communication must be the following information:
 - A. Name of each team member
 - B. Email of the team leader
 - C. **How the team was constituted? In other words have you worked together before? Please include a code of conduct including what happens if people don't pull their weight (i.e. Group rules on this). This section must be very specific as the Professor will refer to this should any group issues occur. The group must try to resolve their own conflict prior to contacting the Professor. The Professor will ask the group what they have done to resolve this conflict if contacted.**
 - D. List of the main strengths and weaknesses of each team member
 - E. A name for your team that symbolizes your "organizational culture"

Plagiarism

At the end of your powerpoint presentation your group must make very clear where ideas, concepts, and principles came from. To do this, include a list of references in your last powerpoint slide identifying the sources used for your presentation in the format of a standard bibliography.

Note: Plagiarism is a serious offence and should be avoided at all costs. Words and ideas that are not your own must be acknowledged. If you are using someone else's words, you must give credit to that person by enclosing the words in quotation marks followed by the proper citation (including the paper number). If you are rephrasing someone else's words or using someone else's ideas, you must give credit to that person by citing their work. Plagiarism will result in a grade of F on the presentation. Do not simply regurgitate the book or you will lose significant marks. Ensure you utilize outside sources of research for your presentation (at least 10 sources).

Performance Appraisal of Individual Performance through Peer Forms

Grading for the term project will be assisted by each team members' performance appraisal of the others on their team. This will be utilized to determine each person's grades regarding the term

project. **Your individual peer form must be sent to the Professor via email prior to your presentation.**

Note: It is likely that an individual in a group who did not do their share of the work would receive less than the grade given for the project. In extreme cases (where the team member did very little) the person could receive an F, even though the project grade was an A. If you do not submit your peer form you will not receive your individual assessment until you do.

POLICY ON CHEATING AND ACADEMIC MISCONDUCT:

Academic honesty is a cornerstone of conduct at university. We cannot have freedom of expression without integrity. While I trust that all of you embrace this principle, instances of cheating or plagiarism arise from time to time. Students are responsible for understanding the nature of and avoiding the occurrence of plagiarism and other academic offences. I urge you to read the section on Scholastic Offences in the UWO Academic Calendar. Note that such offences include plagiarism, cheating on an examination, submitting false or fraudulent assignments or credentials, impersonating a candidate, or submitting for credit in any course any academic work for which credit has previously been obtained or is being sought in another course in this University or elsewhere (without the knowledge and approval of the instructor to whom the work is submitted).

In writing scholarly papers, you must keep firmly in mind the need to avoid plagiarism. Plagiarism is the unacknowledged borrowing of another writer's words or ideas. The following rules pertain to the acknowledgments necessary in academic papers: in using another writer's words, you must place the words in quotation marks and acknowledge that the words are those of another writer: in adopting another writer's ideas, you must acknowledge that they are his/hers. If you are in doubt about whether what you are doing is appropriate, consult your instructor. A claim that "you didn't know it was wrong" will not be accepted as an excuse. Note that the essay may be submitted to a verification program such as Turnitin at the Professor's discretion. This is not meant as a personal affront nor as an accusation of cheating, rather as vigilant attempts at proctoring. A copy of guidelines about how to avoid cheating can be obtained from the office of the Ombudsperson, Room 251 University Community Centre (519) 661-3573.

GENERAL INFORMATION

If, on medical or compassionate grounds, you are unable to meet your academic responsibilities, i.e., unable to write term tests or final examinations or complete course work by the due date, you should follow the instructions listed below. You should understand that academic accommodation will not be granted automatically on request. You must demonstrate that there are compelling medical or compassionate grounds that can be documented before academic accommodation will be considered. Read the instructions carefully. In all cases, action must be taken at the earliest possible opportunity, preferably prior to the scheduled examination, test or assignment.

- Check the course outline to see if the instructor has a policy for missed tests, examinations, late assignments or attendance. The course outline should include the preferred method of contact (e-mail, phone, etc.).
- Inform the instructor prior to the date of the scheduled time of the test or examination or due date of the assignment. If you are unable to contact the instructor, leave a message for him/her at the department office.

- Bring your request for accommodation to the Social Science Academic Counselling Office, Room 2105, Social Science Centre, telephone 519 661-2011 or fax 519 661-3384. Be prepared to submit documentation of your difficulties.
- If you decide to write a test or an examination you should be prepared to accept the mark you earn. Rewriting tests or examinations or having the value of the test or examination reweighted on a retroactive basis is not permitted.

TERM TESTS and MIDTERM EXAMS

- If you are unable to write a term test, inform your instructor (preferably prior to the scheduled date of the test). If the instructor is not available, leave a message for him/her at the department office.
- Be prepared, if requested by the instructor, to provide supporting documentation. Submit your documentation to the Social Science Academic Counselling Office.
- Make arrangements with your professor to reschedule the test.
- The Academic Counselling Office will contact your instructor to confirm your documentation.

FINAL EXAMINATIONS

- You require the permission of the Dean, the instructor, and the Chair of the department in question to write a special final examination.
- If you are unable to write a final examination, contact the Social Science Academic Counselling Office in the first instance to request permission to write a special final examination and to obtain the necessary form. You must also contact your instructor at this time. If your instructor is not available, leave a message for him/her at the department office.
- Be prepared to provide the Social Science Academic Counselling Office and your instructor with supporting documentation.
- You must ensure that the Special Examination form has been signed by the instructor and Department Chair and that the form is returned to the Social Science Academic Counselling Office for approval without delay.

LATE ASSIGNMENTS

- Advise the instructor if you are having problems completing the assignment on time (prior to the due date of the assignment).
- Submit documentation to the Social Science Academic Counselling Office.
- If you are granted an extension, establish a due date.
- Extensions beyond the end of classes must have the consent of the instructor, the Department Chair and Dean. A Recommendation of Incomplete form must be filled out indicating the work to be completed and the date by which it is due. This form must be signed by the student, the instructor, the Department Chair, and the Dean's representative in the Academic Counselling Office.

SHORT ABSENCES

If you miss a class due to a minor illness or other problems, check your course outlines for information regarding attendance requirements and make sure you are not missing a test or assignment. Cover any readings and arrange to borrow notes from a classmate.

EXTENDED ABSENCES

If you are absent more than approximately two weeks or if you get too far behind to catch up, you should consider reducing your workload by dropping one or more courses. This must be done by the appropriate deadlines. (Refer to the Registrar's website for official dates.) The Social Science Academic Counsellors can help you to consider the alternatives. At your request, they can also keep your instructors informed of your difficulties.

DOCUMENTATION

Personal Illness: If you consulted Student Health Services regarding your illness or personal problem, you should complete a Records Release Form at the time of your visit allowing them to notify Social Science Academic Counselling Office. Once your documentation has been assessed, the academic counsellor will inform your instructor that academic accommodation is warranted. If you were seen by an off-campus doctor, obtain a certificate from his/her office at the time of your visit. The doctor must provide verification of the severity of the illness for the period in question. Notes stating "For Medical Reasons" are not considered sufficient.

In Case of Serious Illness of a Family Member: Obtain a medical certificate from the family member's physician.

In Case of a Death: Obtain a copy of the newspaper notice, death certificate or documentation provided by the funeral director.

For Other Extenuating Circumstances: If you are not sure what documentation to provide, ask an Academic Counsellor.

Note: Forged notes and certificates will be dealt with severely. To submit a forged document is a scholastic offense and you will be subject to academic sanctions.

ACADEMIC CONCERNS

1. You need to know if your instructor has a policy on late penalties, missed tests, etc. This information may be included on the course outline. If not, ask your instructor.
2. You should also be aware of attendance requirements in courses such as Business and English. You can be debarred from writing the final examination if your attendance is not satisfactory.
3. If you are in academic difficulty, check the minimum requirements for progression in your program. If in doubt, see your Academic Counsellor.
4. If you are registered in Social Science courses but registered in another faculty (e.g., Arts or Science), you should immediately consult the Academic Counselling Office in your home faculty for instructions.

LECTURE OUTLINE:

Below is a tentative list of the lectures for this course. There may be departures from this list as some topics take up more or less time than originally scheduled. The readings corresponding to the lectures are listed below.

Week	Start of Week	Topic	Text Chapters	Assignment Due Dates
1	Jan 4-8	Introduction to the Course Strategic Management	Chapter 1 Powerpoint	Review course outline Read Chapter 2
2	Jan 11-15	Aligning HR With Strategy Environmental Influences on HRM	Chapter 2 Powerpoint Chapter 3 Powerpoint	Read Chapter 4
3	Jan 18-22	Job Analysis Midterm Review	Chapter 4 Powerpoint	Study for Midterm 1 Read Chapters 5, 6
4	Jan 25-29	Midterm #1	Chps 1-4	Fri, Jan. 29 (12:30 – 2:30 p.m.) Room TBA
5	Feb 1-5	Information Technology for HR Planning The HR Forecasting Process	Chapter 5 Powerpoint Chapter 6 Powerpoint	Read Chapters 7, 8
6	Feb 8-12	HR Demand Ascertaining HR Supply Midterm Review	Chapter 7 Powerpoint Chapter 8 Powerpoint	Read Chapters 9, 10 Study for Midterm 2
	Feb 15-19	READING WEEK	NO	CLASSES
7	Feb 22-26	Midterm #2	Chps 5-8	Fri, Feb. 26 (12:30 – 2:30 p.m.) Room TBA
8	Mar 1-5	Succession Management Downsizing and Restructuring	Chapter 9 Powerpoint Chapter 10 Powerpoint	Read Chapters 11, 12
9	Mar 8-12	Strategic International HRM Mergers and Acquisitions	Chapter 11 Powerpoint Chapter 12 Powerpoint	Read Chapter 13, 14
10	Mar 15-19	Outsourcing Evaluation of HR Programs and Policies Term Project Presentations	Chapter 13, 14 Powerpoint	Fri, Mar. 19 IN CLASS
11	Mar 22-26	Term Project Presentations		Fri, Mar. 26 IN CLASS
12	Mar 29-Apr 2			Good Friday Holiday
13	Apr 5-9	Term Project Presentations		Fri, Apr. 9 IN CLASS Final Exam Review
	April Exam Period	FINAL EXAMINATION PERIOD	Chps 9-14	Room and Date TBA