Scenario A: Talent Management

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About This Case Study

The case begins with introductory information about the organization and is then divided into five scenarios. Each scenario includes question sets for undergraduate and graduate students. A debrief is included with each scenario, but because management dilemmas can be resolved using a variety of solutions, expect that students may come up with solutions that differ from those included in the scenarios. This document contains only Scenario A: Talent management. The scenarios are as follows:

- Scenario A: Talent management.
- Scenario B: Employee engagement.
- Scenario C: Performance management.
- Scenario D: Title IX.
- Scenario E: Employee benefits.
Hudson College: Overview

Founded in 1881, Hudson College is a private liberal arts institution located in Beacon, New York. Hudson is a four-year undergraduate institution accredited through the Middle States Association of Colleges and Schools. Nestled in the Hudson River Valley in Dutchess County between New York City and Albany, Hudson College prides itself in its core values of creativity, collaboration and civility. One of its strengths is its strong partnership with the vibrant Beacon community. Many of Hudson’s employees serve on boards of local nonprofit organizations. Three years ago, the college helped improve the local transit system to provide better access to transportation for students and college employees. The college’s presence in the downtown region is evident with the recent construction of the college bookstore, a coffee house and three student housing complexes along the Hudson River waterfront. Students choose Hudson for a variety of reasons, but most often they point to the low faculty-to-student ratio (12:1), the variety of academic programming and the proximity to New York City (approximately a one-hour drive).

Dr. Sara Richards became the 13th president of the college last year. She replaced the popular Dr. Robert McNulty, who retired after a 12-year tenure, which included a 20 percent increase in student applications, the addition of 15 academic programs, a strong emphasis on global education (the college now offers eight study abroad programs), and an increase in the enrollment of international students from 3 to 7 percent of the total enrollment.

Richards came to Hudson after serving as the provost at a similar liberal arts institution in the Midwestern region of the country. The transition from McNulty to Richards has been viewed as positive, but for many, it is too soon to tell. There is a small number of students and employees who feel the college lacks the necessary leadership to take Hudson to the next level. Richards reports directly to the board of trustees.

Edward Coburn has served as the board chair for the past three years. He retired in 2011 after a long, successful career at Appalachian Trust Bank in Poughkeepsie, New York, where he was the chief executive officer during the last 11 years of his career. The board of trustees, who traditionally have not meddled in human resource (HR) operations, are deeply concerned about the rise in health care costs and have focused their attention on this and other financial challenges facing the college.

Like so many colleges and universities, Hudson has been challenged by the difficult economic climate, increased competition among schools within and outside its peer group, and external pressure from its key stakeholders. The college’s current strategic plan, now in its fourth year, outlined an ambitious agenda focused on diversity and inclusion, a reenergized commitment to increasing the school’s affinity among its
alumni, and a multiyear capital project initiative that includes new construction and renovations to support the academic and residential experiences for students.

Hudson’s endowment, despite losing 16 percent between 2008 and 2010 due to market conditions, has now reached $350 million for the first time in the college’s history. Despite serving as a positive performance measurement, most of this growth can be attributed to a rebound in the market. Large donations from alumni have been difficult to secure, making it a challenge to keep up with competitors.

David Bridges, vice president of human resources and risk management, has been in his current role for six years. He came to Hudson College from a university in New York City, where he was the director of human resources. Bridges has been described by his colleagues as a visionary who has lead several key initiatives since coming to Hudson, including increasing efficiencies through technology enhancements and offering a more competitive compensation model compared to the local market and its peer institutions. Bridges reports directly to Richards.

Janet Mullins, director of human resources, has worked in the human resources and risk management division for 19 years. She started her career as a benefits analyst and moved into her current role shortly after Bridges’ arrival. She reports directly to Bridges.

Elizabeth Guthry, director of organizational development, recently transitioned to higher education after six years as a corporate trainer for a Fortune 500 company. She has struggled with the cultural differences and has found it difficult to produce positive change in her short time at Hudson. She also reports directly to Bridges.

Hudson College has been named one of the “Top 100 Best Organizations to Work For in the State of New York” for four years in a row. Many attribute this ranking to the college’s strong sense of teamwork and employee loyalty to the institution. The human resources and risk management division has also been recognized by local surveys for its care for employees and family-friendly benefits. Despite these recognitions, some faculty and administrative staff believe recent retirements and resignations of individuals in key positions have affected employee morale and the college’s reputation of providing outstanding service to its students. Most of the open positions created by these departures were filled by external candidates, causing employees to question the college’s commitment to its own people.

IN DAVID’S OFFICE

Bridges has been putting together a summary document he planned on giving Richards to prepare for their annual meeting about the division’s goals for the upcoming year. As Bridges reflects on the past year, he notes a number of significant accomplishments that were made in the division. Despite these successes, he admits that it has been the most challenging year since he joined Hudson College.
REFERENCES

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* Acceptance rate: The percentage of student applicants the college accepts.

** Discount rate: Institutional grant aid awarded to undergraduates as a percentage of the institution’s gross tuition revenue.

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Scenario A: Talent Management

PLAYERS

- Fred Winters, vice president of campus operations
- Jessica Wallace, executive assistant for the vice president of campus operations
- Brad Tomlinson, director of facilities
- David Bridges, vice president of human resources and risk management
- Sally Thompson, executive assistant for the vice president of human resources and risk management
- Elizabeth Guthry, director of organizational development

IN FRED WINTERS’ OFFICE

From the day he began as a housekeeping supervisor at Hudson College 32 years ago, Fred Winters, vice president of campus operations, had a reputation as being a “hands off” manager who trusted his staff but provided support when necessary. Winters, a graduate of Hudson College, had been through several changes in administration during his tenure. He would admit that the past few years have been some of the most challenging given turnover rate in his division and the financial strains that have affected campus maintenance and building projects.

One position that recently turned over was the director of facilities. The position was filled three months ago by Brad Tomlinson who had worked in a similar capacity at a local area hospital. Although Tomlinson was viewed by most as an excellent hire, Winters has had multiple meetings with employees from the facilities department regarding Tomlinson’s conduct as a supervisor during his short tenure with the college. Common themes identified by Winters from those discussions were that employees felt Tomlinson was too abrasive and unwilling to listen to their ideas. In keeping with his hands-off approach, Winters initially thought these issues would work themselves out. Winters waited weeks before scheduling a meeting he now wishes he had made sooner.

Winters was gazing out his office window when his executive assistant, Jessica Wallace, knocked on his door to let him know that Tomlinson had arrived for their meeting.

“Hey Brad, come on in,” said Winters. “I appreciate you coming in given how busy things are this week. Is everything on schedule for a great weekend?”
Hudson’s Homecoming Weekend was only a few days away, and Tomlinson and his team had been working overtime to prepare the campus, including making needed repairs to landscaping damaged by a series of heavy storms during the past week.

“Everything is definitely on target for a successful weekend,” Tomlinson replied in a cautious tone. Tomlinson knew the purpose of the meeting was not to talk about Homecoming Weekend.

“Please sit down,” said Winters. “Brad, I will get right to the point about why I asked you to come in to see me. When I hired you three months ago, I knew we were very fortunate to get someone with your background and experience to fill one of the more critical positions on this campus. From my vantage point, since your arrival, everything appears to have not missed a beat. Projects are getting accomplished on time, the campus looks as beautiful as ever, and I have had few complaints from faculty, staff or students. At least, no more than normal,” Winters added to create some levity to an already tense environment. “However, I have had a number of employees who report to you come to me with concerns related to your supervisory skills.” Winters paused to gauge Tomlinson’s initial reaction.

Tomlinson sat back in his seat in disbelief. “I have to say I’m surprised. Why haven’t they come to me if they were upset? What did they say?” asked Tomlinson in a defensive tone.

“That was the first thing I asked each of them—did you have a conversation with your supervisor about this? Gauging from your reaction, it seems they haven’t. I am not going to disclose who came to me because these were confidential discussions. However, I am concerned about why they feel they couldn’t go to you with their concerns. We value collaboration in our division. The other concern, of course, is your management style,” said Winters.

“You’re questioning my management style because of a few conversations you’ve had with my employees?” asked Tomlinson in a louder tone.

“First, I want you to calm down. I sense you are getting defensive,” said Winters. “The goal of this conversation is to not punish you, but to hear your side.”

Tomlinson hesitated and took a deep breath. “This place is so different than the hospital. I don’t know what was allowed before I arrived, but my employees feel entitled. I have high expectations of myself and of my staff. They seem very sensitive. We don’t have the time or resources to coddle every one of them.”

Tomlinson paused while looking down at the floor before making his next comment. “To be honest, there are a few of them that I want to fire right now.” With that, Tomlinson started to get up out of his seat.

“Do you think that’s the right approach to take?” asked Winters.

“Fred, I appreciate you wanting to talk with me. I get the message. Now I ask that you please let me do my job,” Tomlinson said in a direct manner. “I will be sure to give you a report next week after Homecoming Weekend,” said Tomlinson to change
the subject as quickly as possible. Winters thanked Tomlinson. Tomlinson left to oversee the tasks that remain in preparation for homecoming.

ONE DAY LATER IN DAVID BRIDGES’ OFFICE

David Bridges, vice president of human resources and risk management, sat in his office answering a series of e-mails he received earlier in the day about an employee relations incident requiring the attention of a number of division leaders when his assistant, Sally Thompson, informed him that Fred Winters had arrived for their 11:00 a.m. meeting. Winters normally didn’t schedule meetings with Bridges. He usually called if he needed advice or wanted to get a different perspective on a particular issue. Bridges sensed this meeting would be something more serious.

“Always good to see you, Fred,” Bridges said as he greeted Winters at his office door. Bridges’ opening remark was somewhat tongue-in-cheek because he was almost certain that the reason to see him was related to an employee matter. Winters replied jokingly, “I can’t think of a better place to be than your office.” Bridges and Winters have had a strong working relationship since Bridges arrived to Hudson six years ago. Bridges could see that Winters was under stress.

Winters sat down, covering his mouth with his hands as he thought about how to begin the conversation. “I had a meeting yesterday in my office with Brad Tomlinson, our new director of facilities.” Looking Bridges directly in the eye, he stated, “You know when you get that gut feeling about someone?”

“Of course,” replied Bridges. “Did you get that feeling yesterday?”

“Actually, I got that feeling during the hiring process,” replied Winters. “Glenn (referring to Glenn Saunders, associate director of facilities) was a finalist for the position, but many, including me, thought he didn’t have the experience to lead the complex projects scheduled over the next few years. Now I’m dreading the choice we made.”
AFTER THE CONVERSATION

Unfortunately, other senior officers have shared similar concerns about recent supervisory hires having difficulties in their transition to Hudson. As Bridges finished reviewing his notes from his meeting with Winters, he realized he needed to talk with Elizabeth Guthry, director of organizational development. Bridges was focused on helping support the transition of recent hires. What was more of a concern, though, was the number of internal candidates for critical positions who were passed over for individuals from outside the college, some without experience in higher education; seven out of nine new supervisors were external. In addition, external searches were conducted in the hiring process of the past three senior officer positions. Bridges thought that Hudson needed to better position employees for future success, whether they had just started or had been there for several years. With that, he sent an e-mail to Guthry, asking her to provide a one-page outline of the current orientation process and to arrange a meeting to discuss how the onboarding process could be improved.

OUTLINE OF HUDSON’S CURRENT NEW-EMPLOYEE ORIENTATION PROCESS

Before first day: Mail to new employee
- Congratulatory letter with start date.
- Benefits enrollment and payroll forms.
- Employee handbook.
- Copy of letter with start date and new employee checklist to immediate supervisor.

First day: New-employee orientation
- New employee reports to human resources and risk management division for a half-day orientation to include:
  - Welcome and introductions.
  - Video “History of Hudson.”
  - Overview of each campus division (with presenter from each division).
  - Employee benefits discussion.
  - Campus tour.
  - Lunch with HR staff members.
- New employee is escorted by an HR representative to his or her department at the conclusion of the lunch.

*A training program currently does not exist for new supervisors.*
SCENARIO A: QUESTIONS FOR UNDERGRADUATE STUDENTS

1. What are the main issues Bridges and Guthry must immediately address?
2. Given the struggles of new supervisors to make a successful transition to Hudson College, what recommendations would you have to address this challenge?
3. Describe the benefits of hiring internal and external candidates.

SCENARIO A: QUESTIONS FOR GRADUATE STUDENTS

1. What advice would you give to Winters if you were Bridges? How would you connect this advice to the needs of Hudson College?
2. Provide recommendations about how Hudson College can change the culture to place more emphasis on succession planning.
3. What questions or challenges would a talent management strategy address? When is a talent management strategy appropriate, and when is it not appropriate?
SCENARIO A: QUESTIONS FOR UNDERGRADUATE STUDENTS

1. **What are the main issues Bridges and Guthry must immediately address?**

The onboarding process is quite limited with the orientation program being completed on the first day of employment. In addition, there is no onboarding program for new supervisors. Despite the limitations, the orientation does cover some important components to help support the socialization of the college’s new hires.

Critical developmental opportunities that should be addressed in the onboarding process should include a history of the organization, its culture, values, mission, strategic goals, and the competencies that are required to have a successful career at the organization. Engaging employees early and often while also training supervisors to assist new employees in offering the most effective onboarding experience is critical to the hiring process (Lubin, 2011).

Sixty percent of employees consider their organization’s orientation program to be adequate (Savitt, 2011). Although Hudson has formalized the orientation process, there are only two “touch points” in place to communicate with new employees (one before the first day and one on the first day). Hudson should consider redesigning the program and including Guthry’s follow-up with new employees, which could take place in a variety of ways. Some HR departments offer breakfast or lunch programs three to six months after an employee’s start date to assess his or her socialization level to the organization. Doing so also provides an opportunity for new employees to meet fellow colleagues to help support one another in the ongoing transition. Another suggestion is to invite employees who were hired in the past year to discuss their experiences while offering guidance to help ensure their own level of success. Finally, HR departments can survey new employees about their experiences to date and review the data to determine new-hire turnover rates.

Buddy or mentoring systems have been met with varied success. These programs typically include meeting with an employee from another department. Many HR departments have formalized this process to include a selection process for the buddies or mentors, but others have limited the structure and have formed relationships based on experience, interest and goals. Mentors or buddies can be identified either within or outside the department. An internal resource helps the new employee become more familiar with position responsibilities while becoming better acclimated to the department. Just as important, someone providing external support helps offer a broader perspective of the work environment, including organizational culture, traditions and goals.
Depending on the position, an effective practice used by some HR departments is to partner with the supervisor and the new employee to create an individual development plan for the upcoming year. This plan could include on- and off-site training opportunities, readings, and participating in a task force or a committee that could benefit from new employee’s ideas. With the supervisor’s support, an individual development plan can be created to meet the specific needs of each new employee who would appreciate the commitment being made by the organization.

Given the number of difficult transitions that have taken place with new supervisors, Bridges may also want to reach out to senior leaders to get their perspective and ask what human resources and risk management can do to support the onboarding process. This way he can see where the challenges exist and address how the division can make improvements with the support of senior leadership throughout the college.

Bridges should also consider having a conversation with Richards on building a succession culture. Research suggests that creating such an environment is difficult without leadership support. Colleges and universities that embrace the importance of growing talent from within to meet future leadership requirements will certainly gain an advantage over their peer institutions.

2. **Given the struggles of new supervisors to make a successful transition to Hudson College, what recommendations would you have to address this challenge?**

An important element to the success of any new supervisor—either recently promoted or new to the organization—is offering development activities that are not limited to instructional workshops. Human resources and risk management staff must partner with immediate supervisors to provide a developmental path that will meet the needs of the individual employee, department and college. Supervisors may be asked to attend additional training regardless of whether they are new to the supervisory role. A workshop that should be considered is an introductory session on employment law. The session should include laws pertaining to harassment and discrimination, the Fair Labor Standards Act (FLSA), and the Family and Medical Leave Act (FMLA). Even nonsupervisory employees would benefit from this information. Additional workshops could include performance management, recruitment, selection and coaching.

HR staff should collaborate with colleagues throughout the organization to provide a holistic view of the overall operation beyond a presentation of each division. This could include inviting President Richards and other senior leaders to a welcoming event. Colleges and universities can provide opportunities for employees and the community to attend campus programming, including multicultural events, athletic competitions and art exhibits. Special invitations to new employees would be a kind gesture that would make new hires feel even more welcome to their new working environment.
3. Describe the benefits of hiring internal and external candidates.

**Benefits of hiring internally**

HR departments that track hiring metrics have used “the percentage of internal hires” to determine the strength of their current talent management programs. For instance, Energy Future Holdings has increased its internal hiring rate from 56 percent in 2010 to 61 percent in 2011 and an expected 69 percent in 2012 (Schwabel, 2012). There are several benefits to hiring internal candidates to fill job openings:

- **Ensures knowledge of the culture.** Internal candidates possess the knowledge of the culture and internal processes in their particular areas and across the organization.

- **Decreases training and development costs.** There most likely will be a shorter learning curve, depending on length of employment, which would limit costs associated with training and development.

- **Promotes loyalty.** Employees likely will stay in the position longer because they may feel more loyalty due to being promoted.

- **Enhances morale.** Offering employees the opportunity to fill open positions (whether a promotion or not) has a significant effect on employee morale. Individuals need to see examples of internal hiring to know that succession planning is supported by the organization.

- **Avoids the expensive external search.** In some cases, an employee is hired into a new position without having to go through an expensive search process that may include relocation assistance. External searches also typically take significantly more time than hiring from within. The average cost of an external hire is 1.7 times higher than hiring an internal candidate ($15,008 compared with $8,676).

- **Improves chances of success.** A study conducted by the University of Pennsylvania’s Wharton School concluded that external hires were paid 18 percent more than their internal counterparts, and that individuals coming from outside the organization had a lower overall performance rating in the first two years with the company (Schwabel, 2012).

**Benefits of hiring externally**

- **Provides new perspective.** External candidates offer a different perspective that may be needed depending on the circumstances. In some cases, internal candidates may lack the creativity and/or aptitude to address the specific challenges.

- **Shakes up the “business as usual” mindset.** External hires are brought on board to challenge the established status quo.

- **Selects a candidate better suited for the position.** In some cases, an external hire may simply have a more suitable background in terms of knowledge, experience and education.
• Adds new skills when internal candidates’ skill limit is reached. Despite an organization’s desire to hire from within, there are times when existing internal skills do not meet future needs, necessitating an external search.

REFERENCES


SCENARIO A: QUESTIONS FOR GRADUATE STUDENTS

1. What advice would you give to Winters if you were Bridges? How would you connect this advice to the needs of Hudson College?

Winters must be clear with Tomlinson that he does not dictate how Winters should supervise him. The phrase “let me do my job” is a clear indication that Tomlinson wants the freedom to manage his way. However, Winters has not developed the trust in Tomlinson to use his preferred “hands off” approach. Bridges should also recommend to Winters that he set reasonable expectations with Tomlinson. For example, it is essential that Tomlinson create an environment in which employees feel comfortable to discuss concerns with him. That said, employees who go directly to Winters should be encouraged to have that conversation with Tomlinson before coming to him. Finally, Winters should schedule periodic coaching meetings with Tomlinson to provide him support and to show that he wants him to succeed.

In many colleges and universities, supervisors must complete an introductory review with all administrative employees during the first three to six months of employment. Assuming a similar policy exists at Hudson, Winters should meet with Tomlinson to complete the review. Winters, like any supervisor, should document all conversations he has with Tomlinson. An introductory review provides a formal opportunity to discuss expectations on both sides. During this probationary time, Winters has the option to terminate employment if he feels Tomlinson is not meeting the required expectations of the position.

2. Provide recommendations about how Hudson College can change the culture to place more emphasis on succession planning.

There are few examples of formal succession planning in higher education. Multiple studies have concluded that higher education institutions have not embraced talent management with the same enthusiasm as their corporate counterparts. The first step to succession planning is to help build a culture that promotes it, and this step starts at the senior leadership level. A “promote from within” philosophy will have a substantial impact on employee morale. This is not to say that an organization has failed when a performance gap is too wide between the position requirements and the current skill set, necessitating hiring an external candidate, although, admittedly, some organizations have this mindset if they fail to develop staff to assume an open position.

HR professionals can try the following exercise with colleagues at a senior staff meeting. If facilitated appropriately, it could be a valuable use of everyone’s time and most likely will require continued discussion at future meetings.
Identify the most critical positions in the organization, including every position that reports to the president. This task may be the biggest challenge of the entire activity. The number of critical positions will depend on the size of the organization.

Once the task is complete, identify two employees with the experience to assume each identified position should the incumbent leave for whatever reason at whatever time.

Organizations that have difficulty completing this exercise should consider a more proactive approach to developing internal talent. Leaders who identify individuals for each position must still challenge themselves to identify individuals who have the vision to take the organization to the next level for years to come and not simply those who complement the current administration.

After the employees have been identified, leaders should determine the most appropriate path to meaningful development and readiness to assume each position. Does this path involve participation in a cohort-based leadership development program, or should development be more individualized to address the specific needs of each high-potential employee? Should the experience include mentoring, executive coaching or assignments to high-level projects or committees? Maybe all of the above?

The answers to these questions and more must be determined by senior management, with HR serving as the facilitator to the process. The most important question to answer is, “How significant is the performance gap between the high-potential’s current skill level and the expected responsibilities of the critical role?” One must also realistically assess how long it will take to close the performance gap. If it is too long, then the organization may have missed an opportunity and should consider recruiting externally. In any industry, senior executives and HR professionals play key roles in communicating the importance of formalized talent management programs in ensuring the overall prosperity of an organization (Clunies, 2007).

3. What question or challenges would a talent management strategy address? When is a talent management strategy appropriate, and when is it not appropriate?

One way in which the human resources and risk management division can ensure it is viewed as a strategic partner is to work with each division to identify critical positions and potential replacements should an incumbent leave. From an institutional perspective, an exercise that can be used with senior management is asking them to identify the most critical positions (not employees) across the campus. The next step is to describe what that critical position might look like in the next three to five years. Finally, senior officers should identify one to three potential replacements for each critical position. If they cannot identify potential replacements, they must identify the skills required to narrow the performance gap and devise
growth opportunities that could help in the development of each employee. Potential developmental activities can include the following:

- **Leadership assessments.** An example would be the use of a personality assessment such as the Myers-Briggs Type Indicator (MBTI) or DiSC. As a supervisor develops, a 360⁰ feedback evaluation, also known as multi-rater feedback, is a leadership assessment tool used in many executive development programs to evaluate program participants' skills based on an organization's leadership competencies.

- **Coaching.** Although coaching can be conducted through ongoing conversations between a candidate and a supervisor, the process may be improved with an external coach who can implement a more objective approach. A study by the American Management Association titled *Coaching: A Global Study of Successful Practices*, in which more than 1,000 executives and managers were surveyed, suggested that the higher an employee rises in the organization, the more difficult it may be to receive unfiltered information regarding overall performance (Battley, 2008).

- **Mentoring.** The goal of mentoring is to enhance the performance, productivity and effectiveness of employees. Moreover, the ability to connect high-potential employees with individuals in key leadership roles will increase the participants' commitment and dedication levels.

- **Action learning.** Organizations that measure the value of their talent management programs look to work-related experiences or action learning opportunities as sources for this measurement. To be effective, action learning does not have to be separate from “real work” experiences. In fact, such experiences should be designed to fit into the objectives of a particular department or division (Thomas and Saslow, 2007).

**REFERENCES**


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