pHCLE Study Group

Strategic Staffing

Instructor: Dr. Lori Reffert

November 3, 2021

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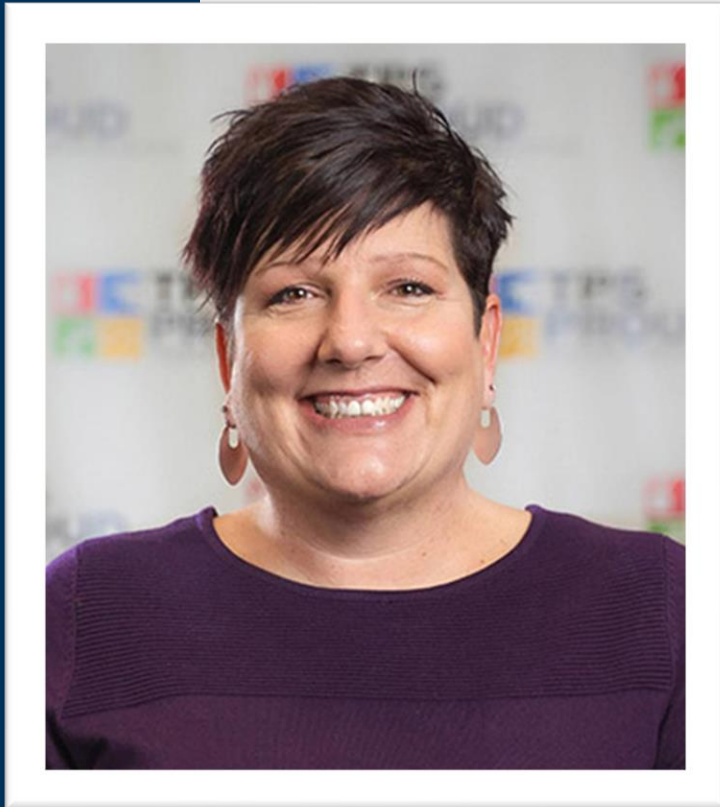
Dr. Lori Reffert, pHCLE

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Getting to Know You!

In the chat please share...
1. Name
2. Job Title
3. Organization Name – City, State
4. Student Count

Study Session Outline:

- Introductions
- Preparing for the exam
- How I prepared…
- Reviewing each quadrant:
  - Checking for baseline understanding: Kahoot!
  - Reviewing Standards
  - Instructor Examples
  - Q&A

Study Session Purpose:

1. Gain strategies to prepare for your exam
2. Briefly review four areas of the standards
3. Learn from instructor examples
4. Check your understanding with practice test questions
5. Answer your questions about the exam

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Preparing for your Exam

Reading Reference Guide
The pHCLE Reading Reference Guide is resource to help you engage in a self-study program for the certification exam. The guide defines key terms and provides links to suggested readings to help you further your learning. Topics are organized by the Human Capital Leaders in Education Professional Standards.
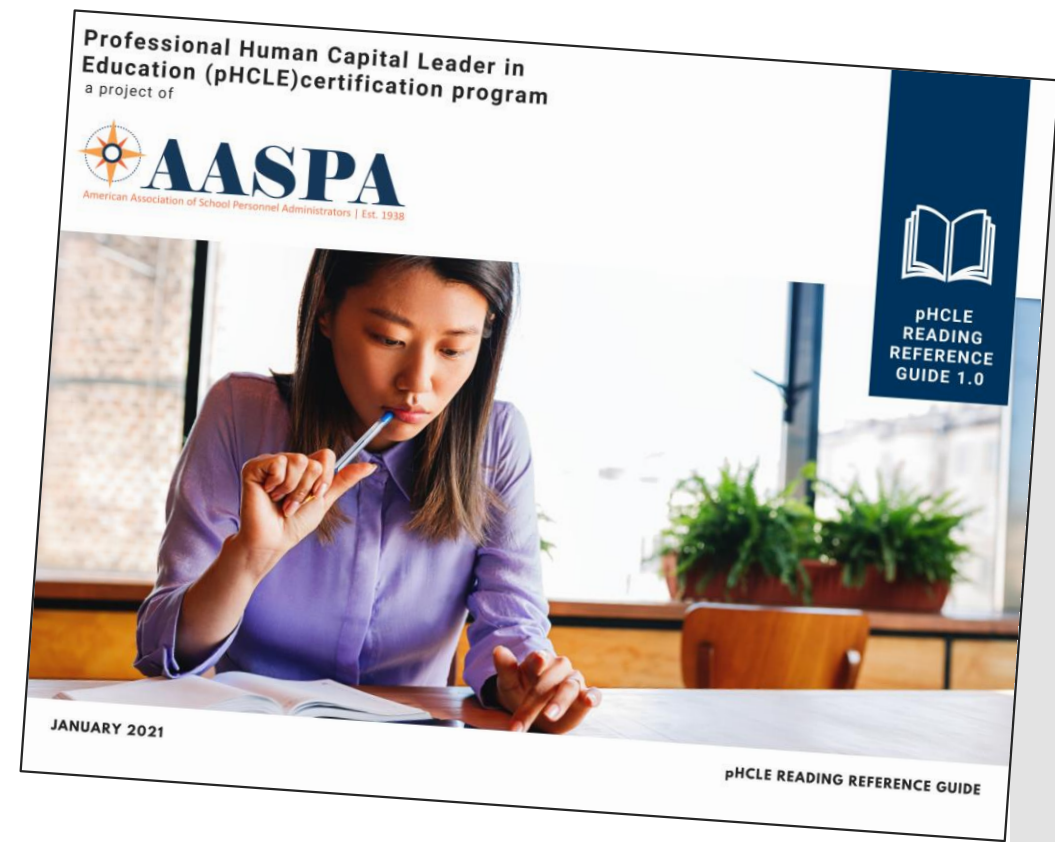
AASPA Recorded Webinars
AASPA offers recorded webinars as an additional resource for our members. Webinar topics are researched, created, and delivered by AASPA members. All webinars align with HCLE standards and some are eligible for HRCI or SHRM re-certification credit.

Study Sessions
These sessions will be recorded and accessible to review after the they are completed.

Other Professional Development Activities
Other growth and development activities such as reading HR books and articles, attending an HR conference, taking classes, etc. will help prepare individuals for the pHCLE exam.

Professional Human Capital Leader in Education (pHCLE) certification program

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pHCLE READING REFERENCE GUIDE 1.0

JANUARY 2021

pHCLE READING REFERENCE GUIDE

Webinar Title	Recording Date	HCLE Topic 1	HCLE Topic 2
Increasing Your Instructional Candidate Pool When Competition is High!	11/23/2020	Recruiting	Career Ladders
Teacher Internships as a Component of a Viable Teacher Recruitment Pipeline	11/17/2020	Recruiting	Career Ladders
Hire Top Talent Using Standards Based Interview Protocols	11/10/2020	Selection	
Developing a Mentoring Program for Education Support Professionals	7/2/2020	Continous Improvement	Onboarding
How to Engage Education Support Professionals in District-Wide Professional Development	6/30/2020	Strategic Alignment	Training & Development
The New Title IX: Unexpected Consequences for K-12 Labor and Employment	6/2/2020	Sustainability & Risk Management	
At the Top of Your Recruiting Game	4/8/2020	HR Branding	Recruitment
An HR Brand is Not Just a Logo, a Website or your Business Cards…It's an Experience	3/31/2020	HR Branding	Recruitment

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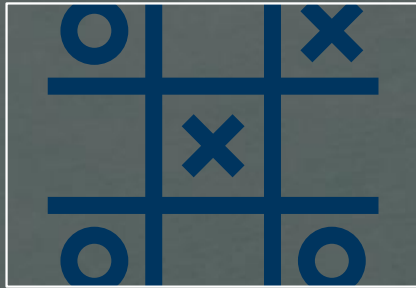
Dr. Lori Reffert Study Plan

How did I prepare for the exam?

1. Terms and definitions are key
   - Flashcards
2. Reread assigned readings and study guide
3. Reviewed examples
4. Went through practice questions multiple times

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Strategic Staffing

Workforce Planning

HR Branding

Sourcing & Recruiting

Selection & Placement

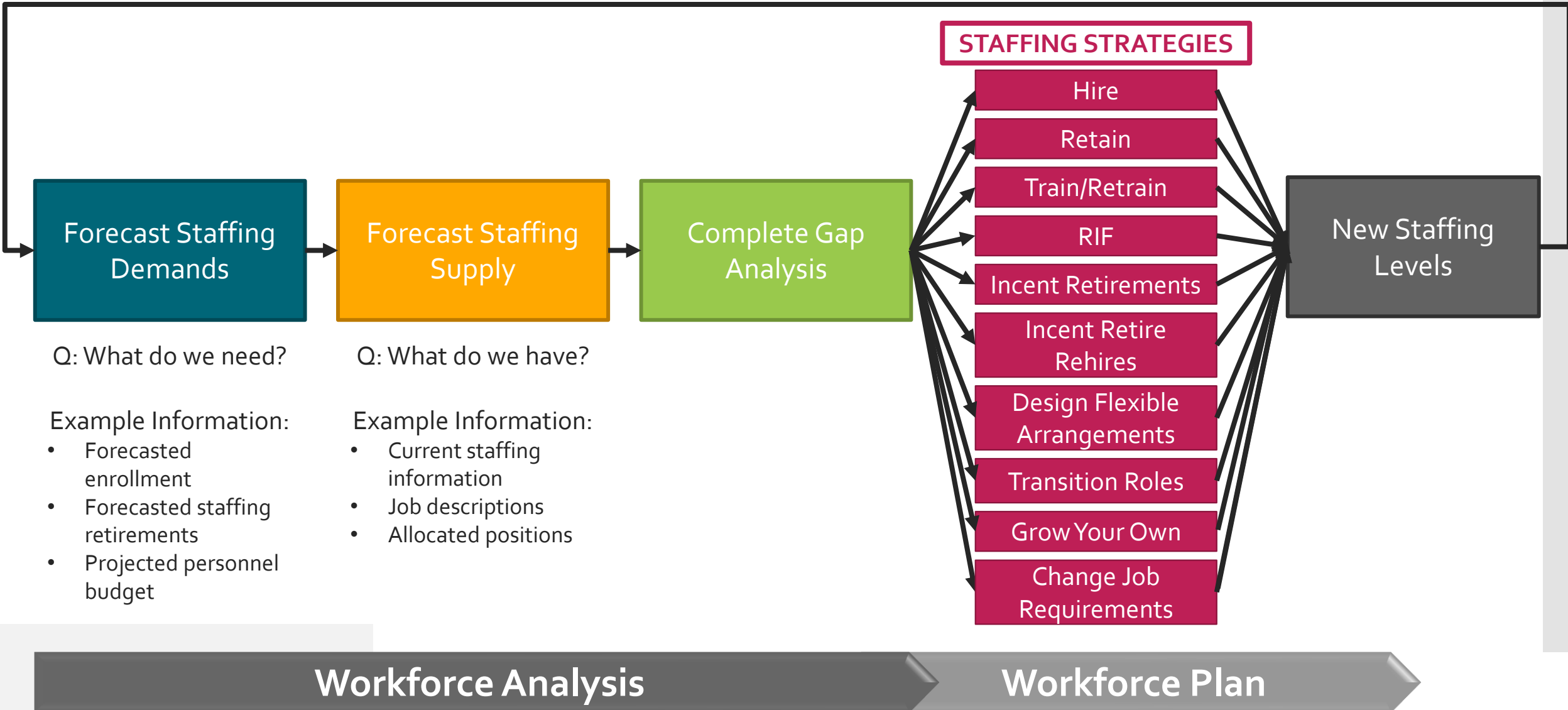pHCLE Exam Weight: 25 %
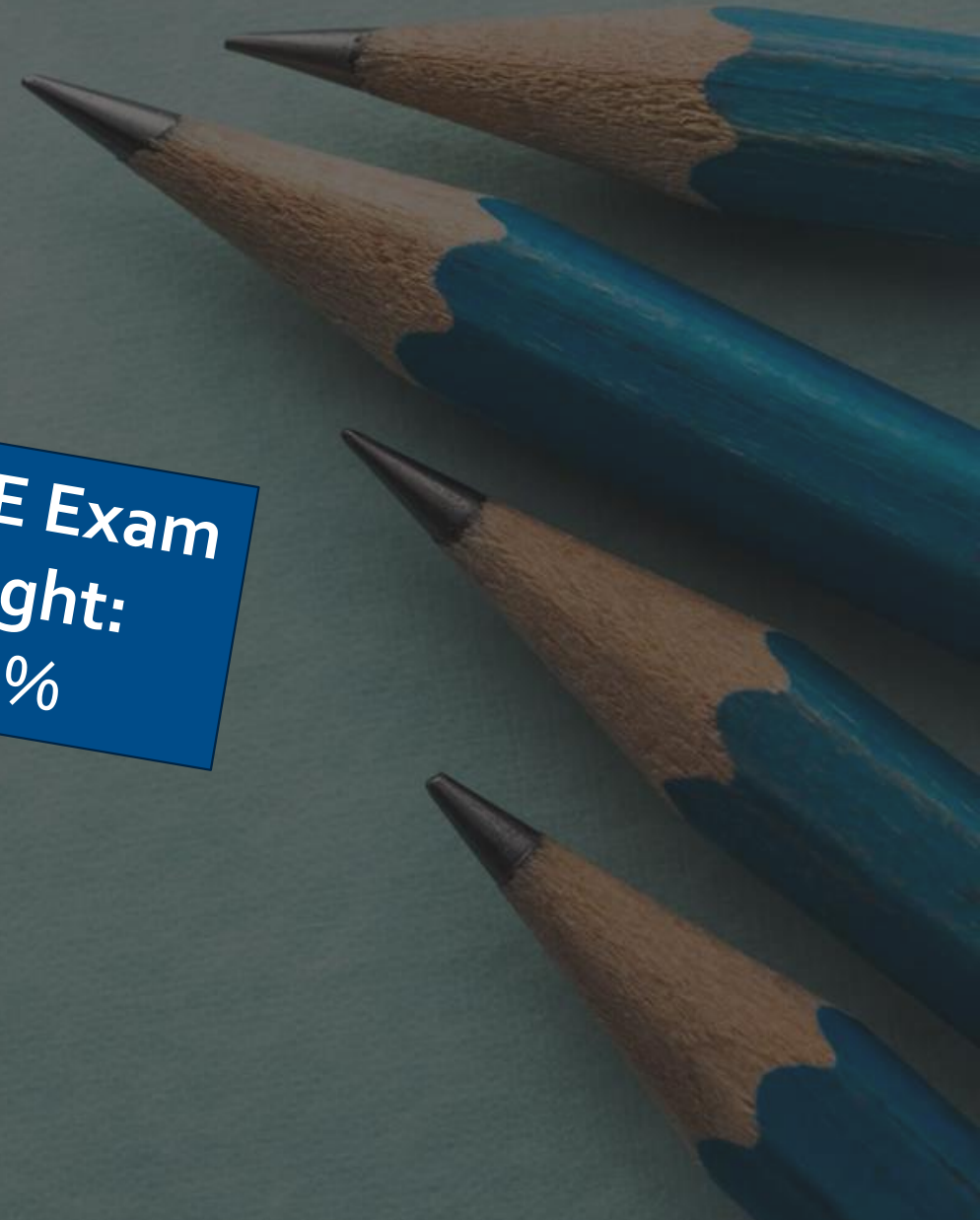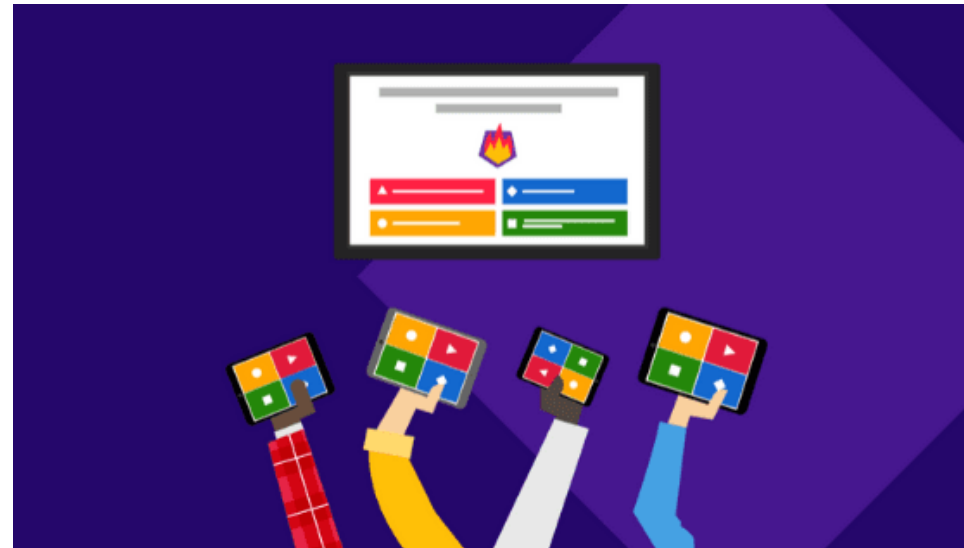
Workforce Planning

Process to align the workforce with the needs and priorities of the organization.

Workforce Planning

HCLE Standard	Content Outline	Terms & Definitions
S.WP.1 Analyze staffing requirements to meet strategic goals.	• Workforce planning process: Involves three steps: 1) supply analysis, 2) demand analysis, and 3) gap analysis.	❑ **Demand Analysis:** An evaluation of future needs of the organization including desired staffing levels; desired knowledge, skills, and abilities; and projected personnel expenses. ❑ **Gap Analysis**: The process of comparing supply and demand to identify areas of misalignment. ❑ **Supply Analysis**: An evaluation of current resources including staffing levels; staff knowledge, skills, and abilities; and projected funding. ❑ **Workforce Analysis**: Process of examining data to uncover gaps between supply and demand. It is the first phase of workforce planning and serves as the foundation of a workforce plan. ❑ **Workforce Plan**: Report that identifies targeted strategies to ensure that the organization's workforce is operating within budget and addresses the existing and anticipated needs of all learners. ❑ **Workforce Planning:** Process to align the workforce with the needs and priorities of the organization and the students it serves.
S.WP.2 Create job descriptions that reflect position requirements.	• Purpose and core components of a job description • Job analysis	❑ **Job Analysis**: Systemic study of jobs to determine what activities (tasks) and responsibilities they include, personal qualifications necessary for performance, conditions under which work is performed, and reporting structure. ❑ **Job Description**: Written summary of the qualifications required to perform a job, including duties, responsibilities, physical requirements, and necessary qualifications. (Job descriptions are a foundational part of many HR processes.)

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S.WP.1 Analyze staffing requirements to meet strategic goals.

Forecast Staffing Demands

Forecast Staffing Supply

Complete Gap Analysis

STAFFING STRATEGIES
- Hire
- Retain
- Train/Retrain
- RIF
- Incent Retirements
- Incent Retire Rehires
- Design Flexible Arrangements
- Transition Roles
- Grow Your Own
- Change Job Requirements

New Staffing Levels

Q: What do we need?

Example Information:
- Forecasted enrollment
- Forecasted staffing retirements
- Projected personnel budget

Q: What do we have?

Example Information:
- Current staffing information
- Job descriptions
- Allocated positions

Workforce Analysis

Workforce Plan

S.WP.2 Create job descriptions that reflect position requirements.

Job Analysis

DATA SOURCES
Employees
Supervisor
Job analyst
Job/Process Information

COLLECTED JOB INFORMATION
Tasks
Required knowledge, skills, and abilities
Education, Licensure, Certifications,
Certificates, & Other Training
Job Experience
Equipment used
Work Environment & Hazards
Physical Demands
Supervisory Responsibilities

DATA COLLECTION PRACTICES
Shadowing
Interviews
Questionnaire
O*Net
Process Records

Job Description
Job Title
Reports To
Pay Band
Job Summary
Job Duties
Education Requirements
Knowledge, Skills, & Abilities (KSAs)
Physical Demands

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Remember...

Job analysis is a study of the <u>job</u> **NOT** the person in the job.

Ask This	Not That
• What level of education is required to perform the essential job tasks?	• What degrees or certifications does the incumbent have?

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HR Branding

Process of managing and influencing your reputation as an employer with current and prospective employees and stakeholders.
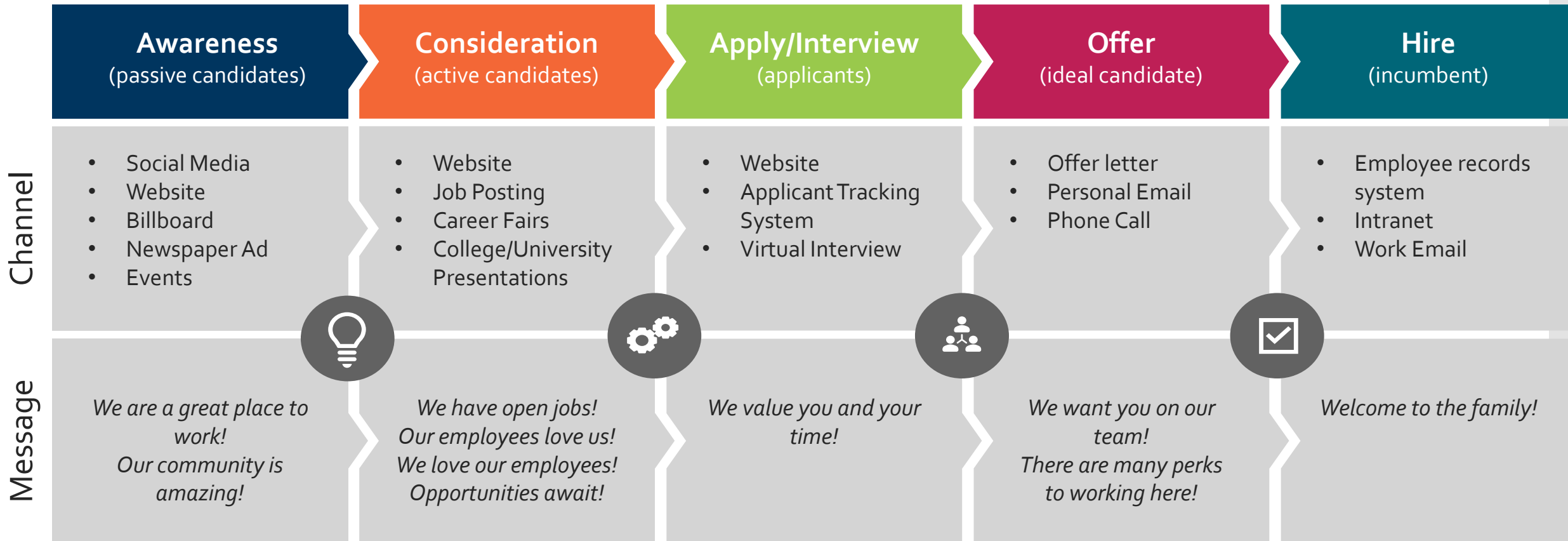
Human Resources Branding

HCLE Standard	Content Outline	Terms & Definitions
S.BR.1 Present a consistent organizational brand.	• Assessing your HR brand: Role of actual candidates, ideal candidates, and incumbents • Communicating your brand	❑ **Actual Candidates:** People who have applied for a position in your organization. Help you determine how well an HR brand intervention worked. ❑ **Employee Value Proposition:** A statement that communicates the essence of an organization—how it is unique, what it stands for, and why people would want to be part of it. ❑ **Human Resources (HR) Branding:** Process of managing and influencing your reputation as an employer with current and prospective employees and stakeholders. ❑ **Ideal Candidates:** Person(s) who would best meet your needs in a position. Help you hypothesize what the future-state HR brand should be. ❑ **Incumbents:** Person(s) who are currently in a specific position within the organization. Help you analyze your current HR brand. Also see definitions and references under P.CO.1 Use communications to ensure effective implementation of the HCMS.

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S.BR.1 Present a consistent organizational brand.

Employee Value Proposition (EVP) Communication Channels and Messages

Communicate your EVP throughout the employee journey!

Awareness (passive candidates)	Consideration (active candidates)	Apply/Interview (applicants)	Offer (ideal candidate)	Hire (incumbent)
Channel				
• Social Media • Website • Billboard • Newspaper Ad • Events	• Website • Job Posting • Career Fairs • College/University Presentations	• Website • Applicant Tracking System • Virtual Interview	• Offer letter • Personal Email • Phone Call	• Employee records system • Intranet • Work Email
Message				
We are a great place to work! *Our community is amazing!*	*We have open jobs!* *Our employees love us!* *We love our employees!* *Opportunities await!*	*We value you and your time!*	*We want you on our team!* *There are many perks to working here!*	*Welcome to the family!*

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Sourcing & Recruiting

Process of uncovering sources of high-potential candidates by reviewing information on current successful employees and identifying targeted strategies to locate qualified candidates and convince them to apply to your organization
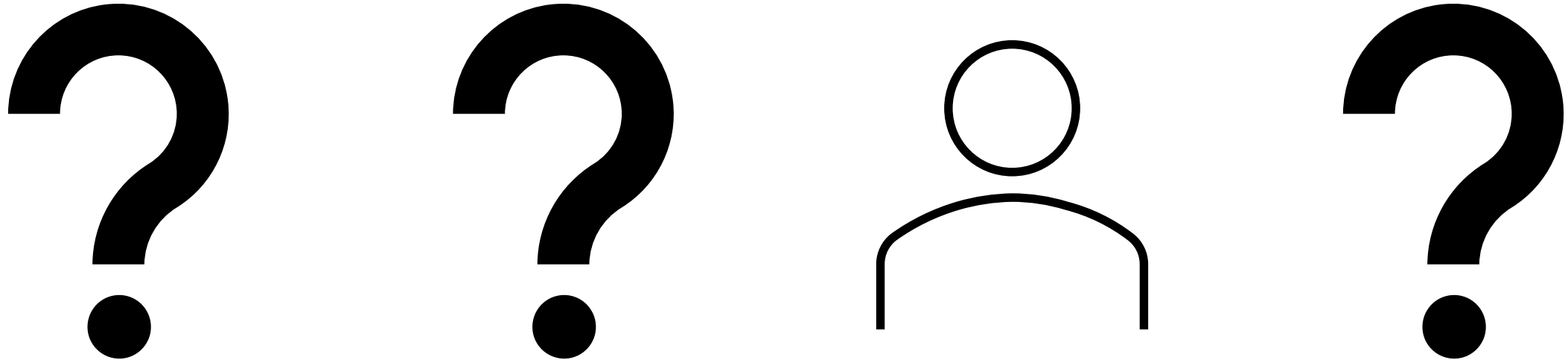
Sourcing & Recruiting

HCLE Standard	Content Outline	Terms & Definitions
S.SR.1 Identify sources of high-quality candidates.	• Sourcing practices	❑ **Sourcing:** Uncovering sources of high-potential candidates by reviewing information on current successful employees.
S.SR.2 Develop a recruitment strategy.	• Building a talent pipeline: e.g., Grow-your-own programs, Alternative certification programs, Community partnerships	❑ **Talent Pipeline:** Pool of potential candidates who are qualified and prepared to fill key roles in your organization when there are openings. ❑ **Talent Pipeline Management:** Actively building and maintaining a sustainable pool of talent for your organization. ❑ **Recruiting:** Targeted strategies to identify qualified candidates and convince them to apply to your organization. ❑ **Active candidates:** Individuals who are currently searching for a new job. ❑ **Passive candidates:** Individuals who possess desired skills and/or qualifications, but who are not actively searching for a new job.
S.SR.3 Implement the recruitment strategy.	• Internal & External recruitment: Advantages and disadvantages	❑ **External Recruitment:** Looking outside the organization to fill an open position. ❑ **Internal Recruitment:** Looking at employees within the organization to fill an open position. ❑ **Targeted Recruitment:** Active process of identifying individuals who meet specific criteria. Often used when hiring for high-level positions or positions that require a specialized skillset.

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Who is your ideal candidate?

Bio/ Background

Frustrations/ Motivations

Goals

Using SWOT Analysis to Develop a Strategy to Improve Sourcing

Internal Factors
(People, resources, processes, past experiences)

STRENGTHS
What do you currently do well with regards to sourcing?

WEAKNESSES
What could you improve with regards to sourcing?

External Factors
(Trends, legislation, demographics, current events)

OPPORTUNITIES
What opportunities are open to you?

THREATS
What threats could cause setbacks?

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Linking HCLE Standards:
See also P.SA.1 Develop an organizational strategy.

S.SR.2 Develop a recruitment strategy.

How will you connect with potential candidates?

Who
- Ideal candidate profiles/personas
- Job description/position requirements

Where
- Sources of ideal candidates

How
- Communications channels
- Messaging aligned to goals/frustrations/motivations

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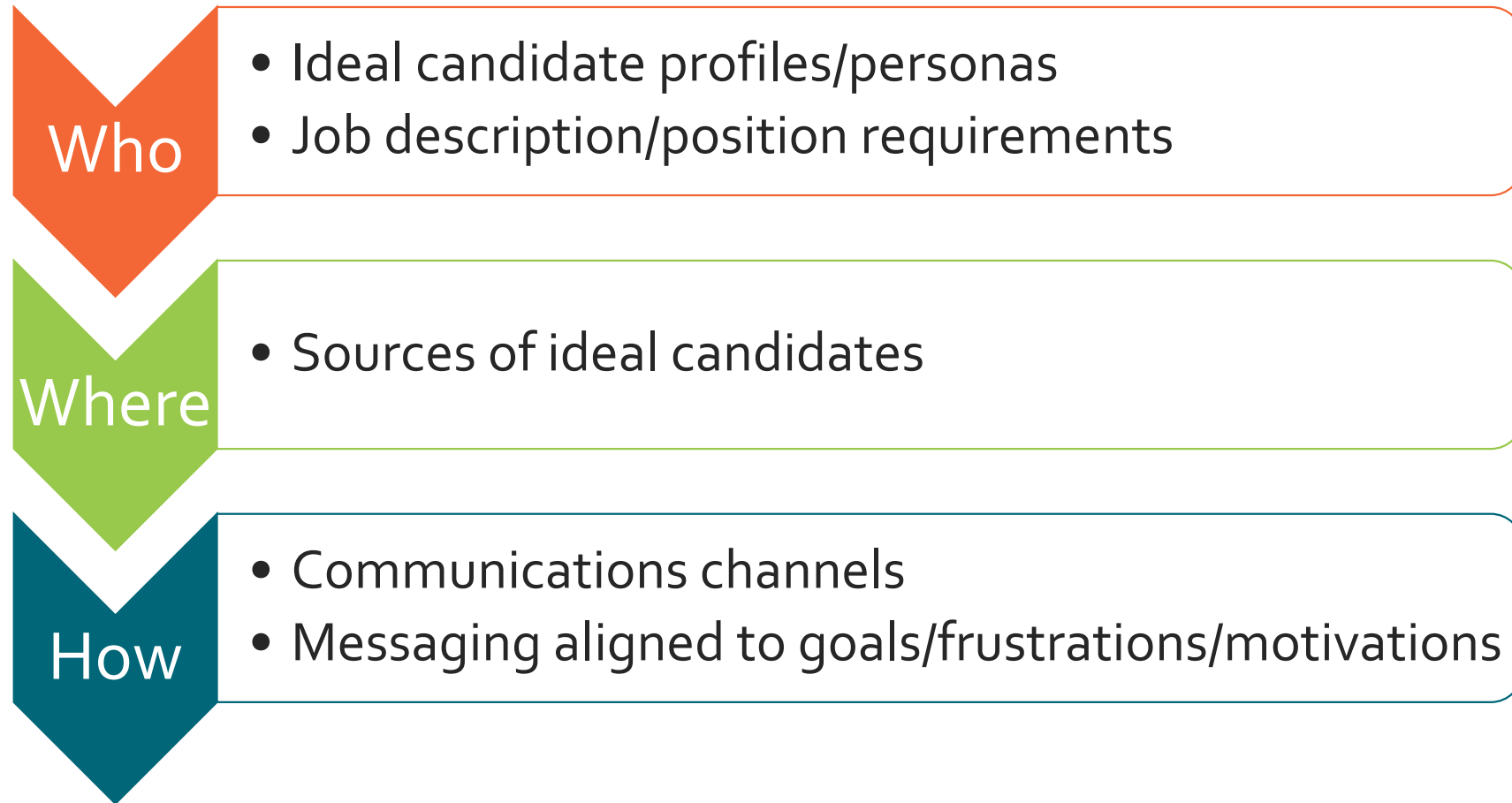
Internal vs. External Recruiting

	INTERNAL	EXTERNAL
ADVANTAGES	• Understands the mission, vision, or culture • Invested in the organization • Provides growth opportunities/ rewards performance	• Can hire for needed expertise or experience • New perspective/ideas • Can help facilitate a change in direction
DISADVANTAGES	• Can be time consuming to develop skills and abilities • Creates another position opening • Jealousy/ office politics	• Limited information about performance history • Higher cost • Morale of internal candidates who weren't selected

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Selection & Placement

Process to identify the most suitable candidate for an open position based on the competencies required to perform the job and then assign staff to departments, buildings, and/or groups of students.
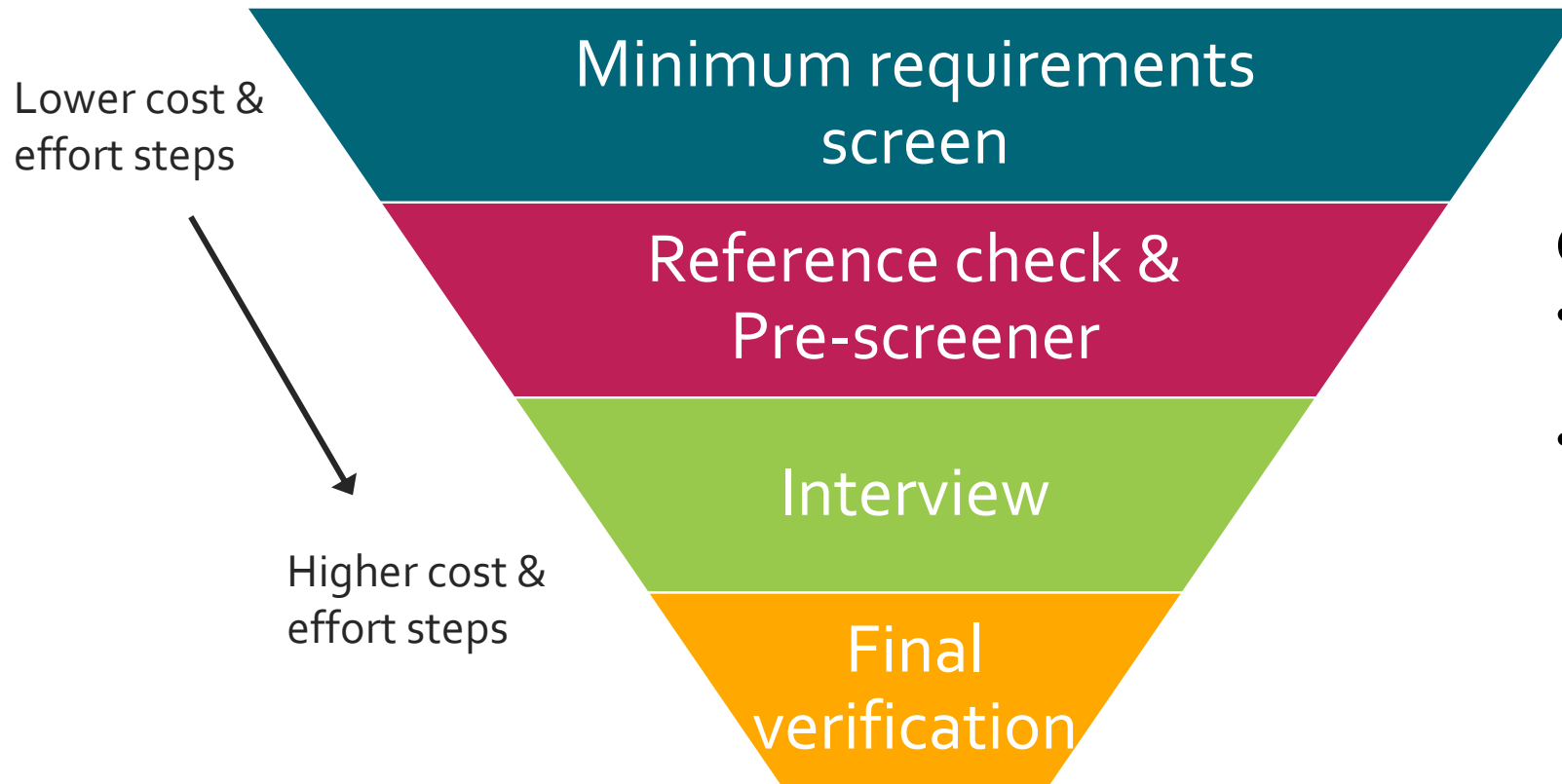
Selection & Placement

HCLE Standard	Content Outline	Terms & Definitions
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S.SP.2 Select and hire staff.	Federal laws and guidelines relevant to employee hiring and selection.	**Select List – See Reading Reference Guide for full list of Terms** ❑ **Adverse Impact:** A significantly different rate of selection in hiring, promotion, or other employment decisions that negatively and disproportionately impacts members of a specific race, gender, or ethnic group. ❑ **Disparate Treatment:** An employment decision, practice, policy, or tool that intentionally discriminates against a protected class based on race, color, religion, sex, or national origin.
S.SP.3 Determine placements for new and existing staff.	• Placement strategies for dealing with students' inequitable access to effective instruction. • Implications of state equity plans for human capital leaders in education.	❑ **Centralized Staffing Function:** Staffing processes are standardized and directly controlled by the central office management team. ❑ **Decentralized Staffing Function:** Staffing is managed locally, with strategies and processes that are tailored to local circumstances. ❑ **Equity gap:** The difference between the rate students from low-income families or students of color are educated by excellent educators and the rate at which other students are educated by excellent educators. ❑ **Placement:** The process by which staff are assigned to buildings and/or groups of students.

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Funneling Example: TPS Teacher Selection Process

Lower cost & effort steps

Higher cost & effort steps

Minimum requirements screen

Reference check & Pre-screener

Interview

Final verification

Goals:
- Use resources more efficiently
- Improve reliability & validity of the process by using multiple measures/ data points.

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$$\text{Cost per hire} = \frac{(\text{Internal Recruiting Costs} + \text{External Recruiting Costs})}{\text{Total number of hires}}$$

Internal recruiting costs: Organizational costs to carry out recruiting activities

- Examples: Salaries and benefits for recruiting and staffing employees, Employee travel to job fairs, Referral bonuses

External recruiting costs: Fees paid to outside organizations

- Examples: Job board postings, Applicant tracking system, Printing expenses for recruitment materials

S.SP.1 Develop a selection process.

Cost per Hire Practice Question

Expense Type	Expense Details	Total Cost
HR Recruiting & Staffing Personnel	734 hours, $35/hour burdened labor rate	?
Transportation Manager	70 hours, $68/hour burdened labor rate	?
Employee Referral Bonus	$100 bonus for each referral that results in hire. Nine (9) new bus drivers were referred.	?
Applicant Tracking System	$2050	?
Advertising/Job Boards	$625	?
Printing	$150	?
		?

What is the cost per hire for bus drivers? During the school year **42** new bus drivers were hired.

Total Cost per Hire = ?

S.SP.1 Develop a selection process.

Cost per Hire Practice Question

Expense Type	Expense Details	Total cost
HR Recruiting & Staffing Personnel	734 hours, $35/hour burdened labor rate	$25,690
Transportation Manager	70 hours, $68/hour burdened labor rate	$4,760
Employee Referral Bonus	$100 bonus for each referral that results in hire. Nine (9) new bus drivers were referred.	$900
Applicant Tracking System	$2050	$2050
Advertising/Job Boards	$625	$625
Printing	$150	$150
		$34,175

What is the cost per hire for bus drivers? During the school year **42** new bus drivers were hired.
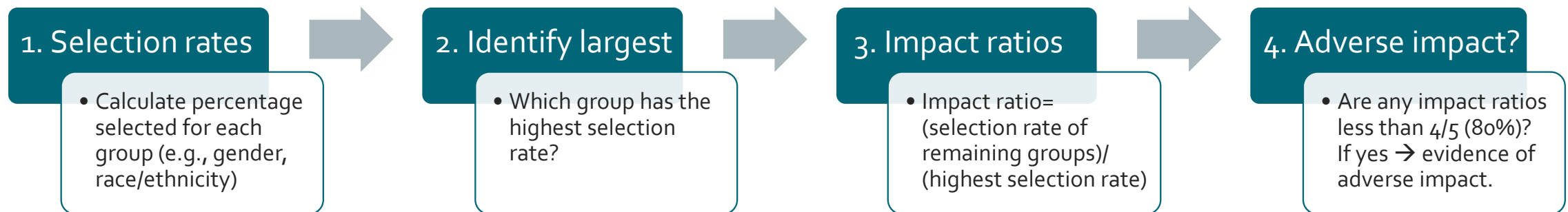
Total Cost per Hire:

$34,175/42 = **$813.69**

Monitoring Selection Processes for Adverse Impact

How do you know if your hiring process <u>unintentionally</u> discriminates against a group of employees?

- The <u>Uniform Guidelines on Employee Selection Procedures</u> establishes federal guidance to help organizations develop selection procedures that comply with EEO laws.

- The uniform guidelines recommend using the **four-fifths (or 80 percent) rule** to uncover evidence of adverse impact in selection processes. This approach can be used to examine any employment decision (e.g., termination, promotion, compensation).

1. Selection rates
- Calculate percentage selected for each group (e.g., gender, race/ethnicity)

2. Identify largest
- Which group has the highest selection rate?

3. Impact ratios
- Impact ratio= (selection rate of remaining groups)/ (highest selection rate)

4. Adverse impact?
- Are any impact ratios less than 4/5 (80%)? If yes → evidence of adverse impact.

Linking HCLE Standards:
See also P.SR.1 Apply relevant law and regulations to education organizations.

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S.SP.1 Develop a selection process.

Adverse Impact Practice Question

Is there evidence of adverse impact in the following hiring process?

1.

Group	# Candidates	# Hired	Selection Rate	Impact Ratio
Males	21	5		
Females	48	14		

S.SP.1 Develop a selection process.

Adverse Impact Practice Question

Is there evidence of adverse impact in the following hiring process?

1.

Group	# Candidates	# Hired	Selection Rate	Impact Ratio
Males	21	5	5/21 = 0.238	
Females	48	14	14/48=0.292	

2. Which group has the highest selection rate?

Adverse Impact Practice Question

Is there evidence of adverse impact in the following hiring process?

1.

3.

Group	# Candidates	# Hired	Selection Rate	Impact Ratio
Males	21	5	5/21 = 0.238	
Females	48	14	14/48=0.292	

2. Which group has the highest selection rate? **Females**

Adverse Impact Practice Question

Is there evidence of adverse impact in the following hiring process?

Group	# Candidates	# Hired	Selection Rate	Impact Ratio
Males	21	5	5/21 = 0.238	
Females	48	14	14/48=0.292	0.238/0.292=0.815

1. **3.**

2. Which group has the highest selection rate? **Females**

4. Is there evidence of adverse impact?

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