

# STAFFING MANAGEMENT

## INSTRUCTOR'S MANUAL



### The Georges Hotel

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### Scenario C: Staffing and Employee Conduct

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**Please note:** All company and individual names in this case are fictional.

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# The Georges Hotel

The Georges Hotel is a small upscale boutique hotel located along the Magnificent Mile in Chicago. It is owned by two brothers, Jeff and Chad Mitchell. The Georges was rebuilt from an old hotel that was badly in need of repair when the Mitchells purchased it from a major hotel chain in 1995. After extensive renovation, the property was reopened as the Georges Hotel and has operated profitably since 1998. As the case opens, the Mitchells are preparing to acquire another run-down hotel in Chicago. It too will be renovated and reopened. This will be the second Georges Hotel in what they anticipate will be a small chain of Georges Hotels located in major cities across the country.

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 C: Staffing and employee conduct. The scenarios are as follows:

- Scenario A: Family-owned business and strategic planning.
- Scenario B: Succession planning.
- Scenario C: Staffing and employee conduct.
- Scenario D: Supervisors and equal employment opportunity.
- Scenario E: Supporting the organization's mission.

## THE GEORGES HOTEL

### The Hotel

- 163 guest rooms, 65-70 employees.
- Front desk: 10 employees.
- Valet parking services: 8 employees.
- Housekeeping: 28 employees.
- Engineering and facilities maintenance: 4 employees.
- Management and administrative: 15-20 additional staff members assigned to departments throughout the hotel, including management, office support and sales.

### The Garden Terrace Restaurant

- Approximately 35 employees.
- The restaurant is open daily from 5:00 a.m. to 10:00 p.m.
- In addition to restaurant dining, the restaurant provides 24-hour room service and full catering services for meetings, conventions and other hotel events.

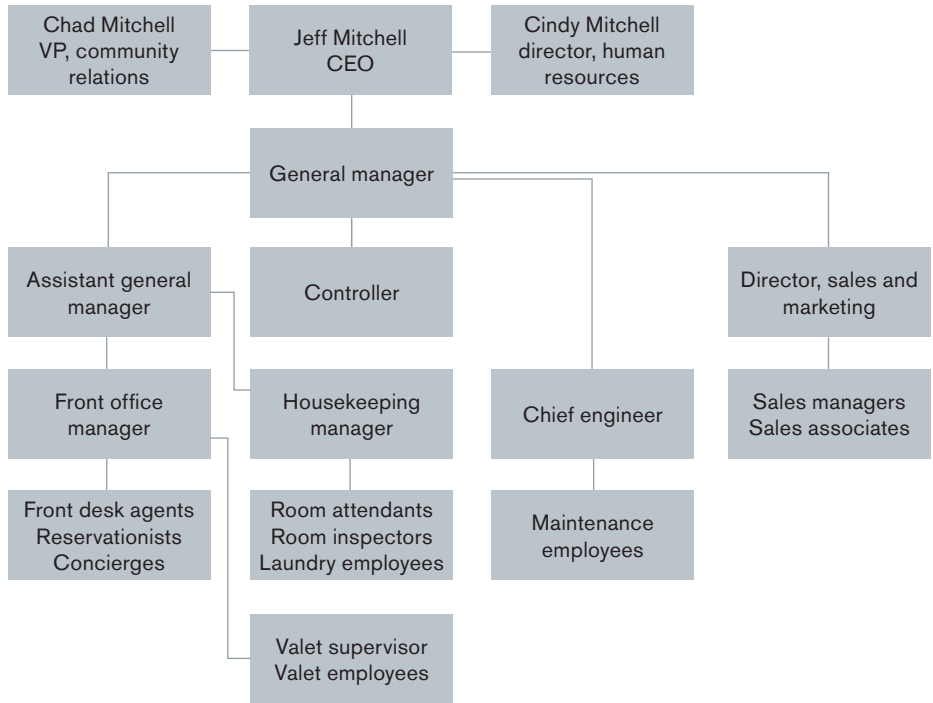
## THE GEORGES HOTEL

### The Mitchell Family

- Jeff Mitchell: Chief executive officer, owner and brother of Chad.
- Chad Mitchell: Vice president of community relations, owner and brother of Jeff.
- Cindy Mitchell: Director of human resources and Chad's wife.
- Michael Mitchell: Sales and operations associate, Chad and Cindy's son and recent MBA graduate.
- Brandon Mitchell: Chad and Cindy's son who is studying for a degree in culinary arts and anticipates a career as an executive chef. Not currently on staff.
- Julie Mitchell: Jeff's daughter who is about to complete an MBA program at a prestigious university. Not currently on staff but expects to work at the hotel after graduation.
- Dale Elsner: Catering service manager in the Garden Terrace Restaurant and Cindy's brother.
- Numerous nieces, nephews, cousins and friends of the family are employed throughout the hotel.

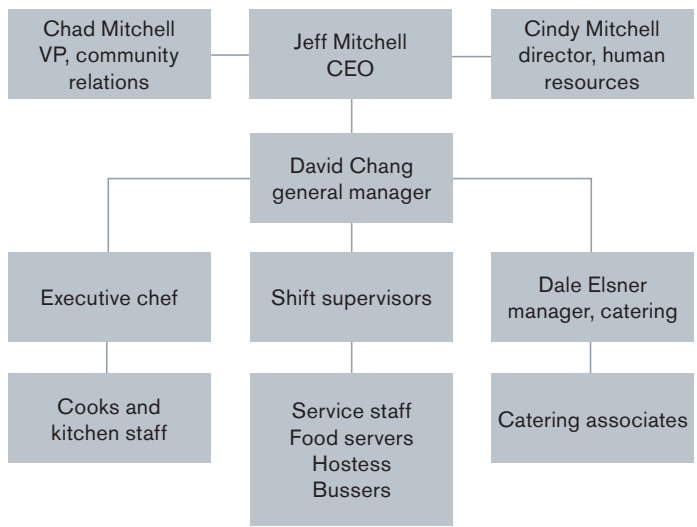
## THE GEORGES HOTEL

### Organizational Chart



## THE GARDEN TERRACE RESTAURANT

### Organizational Chart



## THE GEORGES HOTEL

### The Case

The Georges Hotel is a small European-style boutique hotel located along the Magnificent Mile in Chicago. It is co-owned by two brothers, Jeff and Chad Mitchell. The brothers grew up in the hospitality business; they were raised at the roadside motel their parents owned in the 1960s. Even as a child, Jeff loved the hospitality business. As soon as he was old enough, he worked side by side with his father and was happiest when greeting guests at the front desk and showing them to their rooms. He even enjoyed the less glamorous work and did not mind being asked to sweep the parking lot or to clean a room when housekeeping was short-staffed. It didn't matter what he did as long as it was motel work. He never tired of the guests, no matter how cranky they were on arrival. Jeff always greeted them warmly and was there again in the early morning to wish them bon voyage when they packed up their cars and drove away. Today Jeff is chief executive officer of the Georges Hotel. He makes most of the decisions and manages the hotel's day-to-day operations from his corner office on the top floor.

Chad is the younger Mitchell brother. He had no interest in working at the motel as a child, and he remains the same as an adult. Chad is vice president of community relations at the hotel, and he too has a top floor corner office. He still has little interest in the hotel business, though. He spends most of his time playing golf. When Chicago's weather precludes golfing, he jets off to his favorite courses in Florida and Arizona or to his second home in Palm Springs, leaving his wife, Cindy, to monitor his interests in the partnership. Cindy has no interest in golf, hates the hot climate of Palm Springs and greatly prefers her work at the hotel.

Cindy is the director of human resources. She has been a working member of the management team since the brothers bought the run-down hotel and renovated it to create the Georges. Although Cindy had no management or HR experience before her work at the Georges, she is a natural leader. She is personable, well respected by the staff and is an asset to Jeff in the day-to-day management of the hotel. In many ways, it's the perfect situation for all three Mitchells. Cindy loves her work, and her management role enables Chad to shun the office and remain nearly guilt-free while jetting from one golf course to another, and Jeff is not burdened by Chad's disinterest in the hotel. Instead, he has an excellent partner in Cindy, with whom he often consults on difficult decisions.

The next generation of Mitchells is already being groomed to take over when the time comes. Jeff's daughter, Julie, is nearly finished with an MBA program. She will start in sales and marketing after graduation and then move on to gain experience in operations and general management. Jeff wants her to have a solid background in all aspects of managing the hotel so she is fully prepared to assume the responsibilities of CEO when he retires.

Chad and Cindy have two sons, Michael and Brandon. Michael graduated with honors in his MBA program and is now a sales and operations associate at the hotel. Brandon is currently enrolled in a culinary arts program. He loves the creativity

and hands-on aspect of cooking, and Cindy doesn't expect they will get him out of the kitchen and into management. She and Chad anticipate that Michael will be the future CEO of the Georges Hotel.

Family relationships at the hotel include more than just the immediate family. Although Jeff has been divorced since his daughter, Julie, was five years old, Julie's mother came from a large family. There is an extensive network of nieces and nephews—all of whom are Julie's cousins—employed throughout the hotel. The same is true for Chad and Cindy's family. Cindy's brother, Dale, is the catering services manager, and a number of Cindy's cousins and children of friends are employed at the hotel.

These family connections at the hotel occurred spontaneously because Cindy always preferred to hire by referral. As a result, many employees brought in family members as new hires. Cindy and Jeff believe that family connections among employees benefit the hotel. When jobs are available, Cindy continues to hire by referral, reminding employees that family connections are valued and not frowned on. Family and employees are so important that when Jeff, Chad and Cindy wrote the hotel's mission statement, they agreed to equally emphasize hotel guests and employees. The hotel's mission promises guests exemplary service and a memorable hotel experience. For employees, it promises a superior work environment and continued support for a satisfying career.

To foster the family atmosphere, staff members are encouraged to invite family members to lunch. Families are always included in summer picnics and holiday parties that are hosted by the hotel. Employees post their children's pictures and announcements of new babies, graduations, weddings and other family accomplishments on the bulletin board in the break room. Cindy and Jeff try to remember the names and relationships of staff members so they can personally congratulate parents on their children's accomplishments.

The hotel has done well financially in spite of the expense of renovating the original structure. The hotel was generating a profit within two years of opening, and it continues to be profitable with a high occupancy rate and a solid reputation as a desirable convention venue. Jeff believes it is now time to build on that success and expand to a second Georges Hotel. He has had his eye on another run-down hotel near the riverfront section of Chicago for several years. It closed years ago and has been abandoned and boarded up while a lengthy court battle ensued over ownership rights and bankruptcy. The legal cloud finally lifted after years of litigation; as the current owner, the bank is looking for a solid buyer. With the Georges' history of successful renovation and with current interest rates at historic lows, Jeff believes the time is right for a second Georges Hotel in Chicago. When the second hotel is up and running, he wants to move on to a third. And then, who knows? Jeff envisions a chain of Georges Hotels in major cities across the United States.

As exciting as the possibilities are, Cindy believes that to ensure their success as a multiunit organization, they need more structured management and employee policies than they currently have. The HR department has primarily been an



administrative agency, and there hasn't been much need for things to be otherwise. There is no employee handbook, little formal policy structure, no employee complaint procedure and very little supervisor training. Cindy anticipates that a larger hotel organization will require a far more strategic HR department than she currently manages.

Nepotism has worked well for staffing the current hotel, but Cindy recognizes the downsides to hiring friends and family and knows it will not be adequate for staffing a multiunit organization. For example, there is an assumption among some employees that if you are a close friend or are related to a supervisor or a manager, you have a job at the hotel for life. Consequently, some employees do as little as possible with no repercussions, and supervisors are reluctant to discipline employees because they are probably someone's family member or good friend. There are also attendance problems, but everyone protects their friends and family, and employees have little accountability for performance. Cindy wants to resolve these employee issues before opening a second hotel. At the same time, she wants to ensure that the implementation of new policies will not diminish the positive aspects of family that are inherent in the organizational culture of the hotel—values she believes have contributed significantly to the success of the organization.

### **In Cindy Mitchell's Office**

Cindy picked up her phone and punched in the number for Jeff's administrative assistant. She is calling to schedule a meeting with Jeff for later in the week. She has drafted some policy changes she believes are necessary for the new larger organization, and she wants to share them with Jeff.

"Jeff loves construction," Cindy thought to herself while she waited for the administrative assistant to answer. "I remember when we built the first hotel. He got so caught up in the building process that he forgot about the management structure needed to successfully operate the facility after it was completed. Adding a second hotel is a huge challenge and the perfect opportunity to solidify our management processes so we can replicate it to additional hotels as we add to the Georges. I'm excited to get started."

## THE GEORGES HOTEL

### SCENARIO C

#### Players:

- Jeff Mitchell, CEO
- Cindy Mitchell, director of HR
- Savanna Worthington, assistant to the HR director

Jeff and Cindy's meeting included a discussion of a number of employee issues they agreed need to be resolved before opening a second hotel. Cindy was especially concerned about staffing and employee performance.

"I admit, Jeff, in the early years I wasn't as careful about hiring as I should have been. It just seemed logical to hire employee referrals. Maybe we were just lucky, but that generated some excellent employees, and we still have a lot of those first hires on staff. Do you know Max in corporate sales?"

"Yes, of course I know Max," said Jeff. "He's been great in sales. He brought in several conferences last spring that I think will generate repeat business for a long time to come. We couldn't ask for a better person to represent our hotel in the business community."

"Did you know he's Teresa's son?"

"Teresa? You mean Teresa in food service?"

"Yes. She came to me several years ago when Max was just out of high school. She told me he was taking business classes at the community college and that he was working hard to get into sales, so I told her to send him around when he was ready. I wasn't sure when he first came on, but I couldn't tell him no, and his mother was counting on it. Fortunately, he's been a real success story here."

"Teresa must be very proud of him," said Jeff.

"I'm sure she is. But the downside to my employee referral system is that for every Max we have on staff, we have two or three others who are not up to speed. Employees seldom come to me with complaints, but I know there are rumblings about employees who don't pull their weight and about supervisors who protect their friends and look the other way when things aren't going well. We certainly can't staff a new hotel without a better process."

"You're absolutely right, Cindy. How do you want to handle it?" asked Jeff.

"First, I want to correct our past mistakes. I want to go through our employee records and make sure they are compliant and up to date in all areas. I don't have time to go through the records with the detail we need, so I want to hire an HR assistant to help me get things in order. I've already written a job description for the new position. When that project is done, we need to create a staffing plan that will

carry us into the future. We need a plan that is appropriate for the current hotel and that will carry over to new units.”

“Good idea, Cindy,” Jeff said as he started to laugh. “Do you have somebody’s cousin available that you can hire for the new HR position?”

“No, Jeff! That’s just the point,” Cindy smiled. “I’ve posted the job notice on our website, and I’ve already received a few applications. I want someone with an HR education and job experience. It’s probably best if they’re not anyone’s cousin,” Cindy said. She was laughing too.

### **A Few Weeks Later**

The job posting generated several qualified candidates. After interviews and background checks, Cindy hired Savanna Worthington. Savanna had a bachelor’s degree in management and experience in the HR department of a large hospitality organization. She was a great fit for the new position. Cindy was delighted with her new assistant.

Savanna’s first task was to ensure that all employee files contained proper documentation and are current. Cindy explained that in the early years when she was hiring many friends and relatives, she did not always do a thorough background check or insist on proper documentation for I-9 requirements. Cindy said to Savanna, “How could I ask my cousin’s daughter for ID when I was there when she was born? It seemed ridiculous at the time, but now we have a hodgepodge of incomplete files that need to be corrected.” She gave Savanna permission to run background checks, get DMV records and ask employees for ID whenever the files were lacking. She also asked Savanna to report any issues that could present problems for the hotel. Savanna found a number of issues that needed to be addressed in the next few weeks:

1. A number of employees have no I-9 documentation on file. Savanna asked them to provide current documentation, and most have complied. However, there are four employees who have not presented documentation. They are all long-time employees.
2. A background check found that a three-year employee in housekeeping is a registered sex offender. He is the son of the valet services manager. There is a completed I-9 in his file, but no background check was conducted at the time of hire.
3. A DMV record check shows that an employee in catering received a DUI three months ago and had his driver’s license suspended. The employee drives the hotel van to make catering deliveries. He never reported the DUI to HR. The employee is the son of the hotel accounting manager.
4. Two kitchen employees were previously in a romantic relationship. The relationship went sour, and the two are no longer together. A no-contact restraining order had been served against one of the employees, but the employees still work in the same area.

### SCENARIO C: QUESTIONS FOR UNDERGRADUATE STUDENTS

- What should be done about these employee issues?
- Devise a process that can be used in the future to ensure that these issues do not happen again.

### SCENARIO C: QUESTIONS FOR GRADUATE STUDENTS

Cindy was right to hire Savanna to correct employee issues and to ensure that documentation is up to date and appropriate in employee files. Hiring Savanna to manage that process will allow Cindy to focus on the bigger challenge: ensuring there is appropriate staff when the hotel becomes a multiunit organization. Hiring by referral has largely been a success in the past, but Cindy knows it will not be adequate for the future. There is no staffing plan for the hotel. Cindy wants to start the strategic planning process with a particular emphasis on staffing.

- Create a staffing plan for the Georges Hotel.
- Your plan must correct the current staffing issues and address staffing needs for future hotels as the organization expands.

## DEBRIEF

### SCENARIO C: QUESTIONS FOR UNDERGRADUATE STUDENTS

#### Existing Employee Issues

*1. A number of employees have no I-9 documentation on file. Savanna asked them to provide current documentation, and most have complied. However, there are four employees who have not presented documentation. They are all long-term employees.*

All employees must provide proper documentation. The four who have not complied should receive a written notice from Cindy that they have three business days to provide the proper documentation or they will be subject to termination. The notice should indicate that it is a legal requirement necessary to keep their jobs.

This may be an uncomfortable situation for Cindy because not requiring the documentation at the time these employees were hired was her mistake. She needs to craft her letter carefully to ensure that employees don't perceive a punitive intent in her request. She may want to talk with each of the employees to ensure they understand that she is requesting documents to correct an oversight and not for any other purpose.

Some employees may find it difficult to provide documentation. They may have misplaced their documents, and there can be a delay while they wait for new documents to be delivered from the appropriate agencies. For example, an employee may have lost his or her passport or birth certificate, and this may be why the employee has not responded to the request. If this is the case, the employee needs to provide HR with evidence of the request for new documents, and those new documents must be presented as soon as they are available. Savanna must follow up with these employees to ensure the documents are actually in process. If proper documentation cannot be produced, these employees must be terminated regardless of their longevity with the organization.

**Note:** HR practitioners should always use the most current I-9 forms because regulations and specific requirements are periodically updated.

*2. A background check found that a three-year employee in housekeeping is a registered sex offender. He is the son of the valet services manager. There is a completed I-9 in his file, but no background check was conducted at the time of hire.*

The organization is at risk of negligent retention if the employee harms someone. The hotel could fire the employee in light of the risks involved and the need to protect other employees and hotel guests. However, there may be areas in the hotel where the employee could remain employed with minimal risk. If there is a position available that is fully supervised and does not interact with the public, this may be appropriate work for this employee. This is an area where Cindy needs to research the options and discuss the issue with legal counsel before making a decision.

3. *A DMV record check shows that an employee in catering received a DUI three months ago and had his driver's license suspended. The employee drives the hotel van to make catering deliveries. He never reported the DUI to human resources. The employee is the son of the hotel accounting manager.*

The employee should immediately be prohibited from driving the hotel van. If driving the van is an essential job function, he could be fired because he can no longer meet the minimum job requirements. A second option would be to move him to another position that doesn't require driving, if a nondriving job is available.

Cindy also needs to consider the fact that the employee did not report the violation to HR or to his supervisor. If the hotel lacks a policy that requires employees to inform management of suspended driver's licenses, one needs to be written. If such a policy is already in place, the employee could be subject to discipline for violating it. This could result in termination. Termination could have negative repercussions on the organization, so HR may want to seek legal counsel before making that decision or before proceeding with a termination action.

4. *Two kitchen employees were previously in a romantic relationship. The relationship went sour, and the two are no longer together. A no-contact restraining order had been served against one of the employees, but the employees still work in the same area.*

Organizations often establish policies intended to discourage employee relationships, but regardless of policy, it is impossible to fully prevent them. This could be particularly problematic at the Georges Hotel because relationships there are pervasive, resulting from a long-term pattern of hiring friends and relatives. Instead of trying to discourage relationships, the hotel should establish an enforceable code of conduct for appropriate workplace behavior and provide harassment training—including sexual harassment training—for all employees.

Providing training and requiring appropriate conduct is ongoing, but the immediate issue is complying with the restraining order. Restraining orders are generally tailored to a specific situation between the individuals involved. HR needs to read the order carefully to determine the actions required of the hotel. If the restraining order has implications for the workplace, the response must be in accordance to what is required. If the restraining order requires no contact between the individuals, assigning them to different departments or ensuring that they work different shifts may be all that is required. If the order bars the respondent from entering the complainant's place of business, it may be impossible for the respondent to report to work at all as long as the complainant works there too.

It may seem logical to terminate one of the employees involved to resolve the problem. Firing an employee for exercising his or her right to use the court system may expose the organization to a violation of the public policy exception to employment at will and to retaliation charges. It would be best for all involved if the requirements of the order can be met with some alternative work arrangement. In some cases, though, terminating the respondent is the only option if the respondent is barred from the workplace. In that case, it is important to document that the

reason for the termination was not that the employee was subject to the court order but because the employee was unable to perform the essential functions of the job. Complying with a restraining order is an area where human resources is wise to seek legal counsel before proceeding with a remedy.

### **Process to Be Used in the Future**

Cindy must establish a consistent process for obtaining necessary new-hire documentation. All employees must provide documentation for I-9s regardless of their relationships to the owners or other employees. It is also important that employee files are kept current and that old documents are shredded when they are no longer relevant or when they exceed the required time for retention in the employee's file.

Employee behavior can be improved by establishing and enforcing a reasonable code of conduct. After a code is established, it should be distributed to employees and managers, and the staff must receive training on implementation. The code must be realistic and explicit about what is expected of employees, and it must include an appropriate discipline process. It is important that the code is perceived to be equitable in how employees are managed, and it must be consistently applied throughout the organization regardless of the employee's relationship status.

No code or new process can guarantee complete elimination of inappropriate employee behavior; managing employees is never that simple. Most employee discipline issues can be resolved, however, with clear guidelines, open communication and support from HR.



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## DEBRIEF

### SCENARIO C: QUESTIONS FOR GRADUATE STUDENTS

There has been little need for a formal staff recruitment plan at the Georges Hotel because employee referrals have successfully staffed the organization. Cindy knows, though, that referrals alone will not be enough as additional hotel units are added. She will need to recruit externally to staff the new hotels. A staffing plan will provide structure and guidance for the process.

A staffing plan looks to the future and begins with a clear understanding of where the organization is now. The plan, used in conjunction with the organization's strategic plan, provides a framework to meet the organization's goals.

A staffing plan for future hotels starts by developing a picture of current staffing. Students should refer to the case's introductory material to find staffing numbers for the hotel and an organizational chart. Assuming the current staff is adequate for operating the existing hotel, a similar model could suffice for staffing future hotels if they are similar in terms of location, services, size and so forth. The current hotel has 65-70 employees servicing 163 guest rooms and approximately 35 additional employees working in the restaurant. Using the staffing numbers from the current hotel, some assumptions could be made for staffing future hotels, although some economies of scale may be possible if the organization adds hotels that are larger than the current hotel. For example, excluding the restaurant staff, the ratio of employees to guest rooms is 1:2.33 (one employee for 2.33 hotel rooms). Some labor efficiencies may be realized in a larger hotel, allowing for a ratio of one employee for every three hotel rooms. This may be cost-effective, but management must use caution when they consider operating a facility with lean staffing. It would be counterproductive to staff a new hotel with a tighter staff-to-room ratio if it results in poor customer service or disengaged employees.

Cindy must also understand what skills are necessary for various hotel positions. If she does not have up-to-date job descriptions, they should be revised. Job descriptions identify the knowledge, skills and abilities required for success in a particular job. During the recruiting process, they establish the minimum requirements against which HR will assess the qualifications of job applicants. Cindy should also plan for the training necessary for new employees. It would be unrealistic to assume that every new hire will be at a high level of productivity from the start. Even if she is fortunate enough to hire staff with previous hotel experience, new staff will still need orientation to ensure that they are familiar with the policies and procedures of the Georges Hotel.

Next, Cindy must establish a budget and timeline for recruitment, keeping in mind the time needed to train new employees and allow them to become fully integrated into the organization.

The next step is recruitment. Since the second hotel will be in Chicago, there may be some employees at the current hotel who want to transfer to the new facility. In fact,

it may be desirable to encourage some staff members to transfer to the new location because it will ensure that some of the employees in the new facility are already fully integrated into the processes and culture of the Georges Hotel. However, that will leave empty positions at the existing hotel that will need to be filled. In addition to employees who transfer permanently, Cindy may want to plan for a transition team of existing employees to temporarily work at the new hotel until new staff members are fully trained.

External recruitment will be necessary to staff the second and future hotels. Turnover is historically high in the hospitality industry, so a local labor pool with some training and experience in hospitality may be available. Posting a job opening notice may find some applicants, but that may not be enough. Cindy should use other recruiting methods, such as contacting local colleges and culinary schools for job candidates who have specific training in the skills the hotel needs.

Considering the high turnover rate that is standard in the hospitality business, it may be helpful to form an employee team to come up with ideas on how the hotel can become an employer of choice for hospitality jobs in the Chicago area. If the hotel can establish a reputation as a premiere place to work for hospitality employees, it will help create a steady flow of qualified applicants and minimize turnover.

As the organization expands, recruitment and onboarding new employees will be an ongoing process. There are recruitment firms that specialize in the hospitality industry and provide ongoing staffing services for large hotel chains. As the Georges Hotel expands to multiple locations, outsourcing the staffing function to a specialty recruiting firm may be a viable option, but Cindy may initially want to manage the recruitment function herself. In the future, if she does not hire an outside firm, she may need to expand her HR department to include recruiting and training specialists who can ensure that staffing at the Georges is continually maintained at adequate levels to meet the organization's expansion goals.

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