HR Metrics: aSSIGNment 4 (10%)

# PROJECT SUMMARY

This project may be completed individually or in groups of up to 3 people per group.

*\*\*\*Regardless if you choose to do the project by yourself or in a group,* ***you must sign up to a group****.* ***If you don’t, the Assignment dropbox will NOT appear, you will not be able to download the dataset and you will NOT be able to upload your file.***

You are to create these reports based on the dataset within the Assignment 4 folder:

1. a layoff savings report
2. a report identifying specific employees found within a group and providing financial details of a program to reduce voluntary turnover
3. a report calculating recruitment metrics
4. a report indicating the most useful selection tests for future employees based on actual performance

**NOTE**: The data for this assignment is neither based on Generesta nor the data for Assignment 1, 2 or 3.

# DUE DATE AND SUBMISSION

Please refer to Slate for the due date.

Only 1 person in the group needs to upload the file to the Assignment Folder labelled, “Assignment 4”.

If submitted late a penalty of 10% off per 24 hours will be applied for up to three (3) 24 periods. After that you will receive a grade of 0 for the assignment.

# INSTRUCTIONS AND RESOURCES

Download the file titled, “HR Metrics\_ Assignment 4 Data”. This file contains employee information about a fictional company.

Submit only one file by using multiple tabs for your answers. Do not submit separate files for different questions. ***Marks will be taken off if this instruction is not followed.***

***NOTE: when reporting percentages for all sheets, only show the data to 1 decimal place.***

## Part A: Estimated Labour Savings as a Result of Layoffs

Using the data from the “Terminated Employees” tab and the “Payroll” tab, create a report showing how much money the company has saved over four years due to layoffs. Since salaries haven’t changed over the past four years, use the salary data from the “Payroll” tab to calculate savings.

The report should include the following columns:

* Occupation
* Average Salary (this is the average salary by each occupation)
* Layoffs by year for 2016, 2017, 2018 and 2019
* Total Layoffs
* Estimated 4-Year Labour Cost Savings (for each occupation and provide a grand total)

### Deliverables for Part A

1. Once the report is completed, ensure that it is professionally formatted to draw the reader’s attention to the totals and sub-totals.

## Part B: Joining Multiple Tables Together

The company has specific concerns about voluntary turnover for a specialized group of employees. These roles are critical to the company and the knowledge these employees have must be retained. These employees work on secret government projects and are grouped either into Security Clearance Level 1 or Security Clearance Level 2.

Senior management has told you to stop all voluntary turnover going forward. They have told you that all of these specialized employees are to receive one-time extra “retention” bonuses outlined as follows:

* $25,000 of company stock issued as common shares. This will be paid to ***BOTH*** Level 1 and Level 2 security clearance employees.
* A cash bonus paid immediately based on the employee’s performance rating from the previous year and their tenure (years of service). This will be paid ***ONLY*** to Level 2 security clearance employees.

Senior management believes this should, in part with other initiatives, eliminate most of the voluntary turnover. They have asked you to create a report outlining the total cost for this intervention.

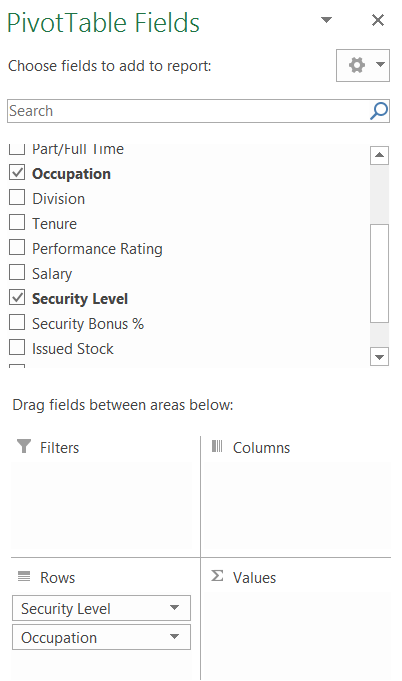
This problem will require the use of advanced Excel functions. Consider using formulas such as IF(), VLOOKUP(), and a combination of INDEX() and MATCH().

### Steps needed to create the report:

1. In the Payroll tab, create a new column and use VLOOKUP() to identify if an employee has a security clearance of either Level 1 or Level 2 from the Security Clearance Lookup Data tab. If the employee doesn’t have a security clearance designation the cell should show “None”.
2. Now, create another column labelled “Security Bonus %” and use a formula to bring in the percent info for each employee. Remember, this is only for Level 2 employees based on performance rating and tenure.
3. Now create another column with the label, “Issued Stock”.
4. Besides the “Issued Stock” column, create a new column at the end of the existing data with the label, “Cash Bonus”.
5. And finally create the last column labelled, “Total Payout” which is the sum of “Issued Stock” and “Cash Bonus”.
6. Use the formulas indicated above (or others you know of) to fill in the data for the new columns. ***NOTE***: *You must use formulas for these columns that are applied to all employees. For example, the formula used for the first employee must be used for all employees in each column. If you use filters to sort the data and input numbers or use inconsistent formulas, you will receive a grade of zero (0) for this entire question.*
7. Once done, use a pivot table to extract data to create a professional looking report. Make sure the pivot table includes Sub Totals and Grand Totals for the report.

The report must contain the following data:

* Security Level
* Occupations
* Headcount by Security Level and Occupation
* Total Issued Stock (in Currency format and rounded to the nearest dollar)
* Total Cash Bonus $ (in Currency format and rounded to the nearest dollar)
* Total Retention $ (in Currency format and rounded to the nearest dollar) 🡪 (this is the total of Issued Stock and Cash Bonus)



***\*\*\*\*When creating the pivot table, first place the field “Security Level” in Rows and then put “Occupation” in Rows underneath “Security Clearance”.***

**Note**: the picture to the right does not  
show the complete pivot table setup.

### Deliverables for Part B

1. Ensure all steps to create the report have been followed and all formulas can be verified.
2. Once the report has been created, ensure that it is professionally formatted to draw the reader’s attention to the totals by Security Clearance Level and all Grand Totals.

## Part C: Recruitment Metrics

Senior management has asked you to provide them with recruitment metrics to understand this function’s effectiveness.

For this task use the tab labelled, “Recruitment Data” to complete this question.

Within the raw data, add columns and calculate the metrics listed below.

Using a pivot table, **calculate the average number of days for each metric** *broken down by Permanent Full Time and Temporary Full Time*. The metrics should be rounded to 1 decimal place.

|  |  |  |
| --- | --- | --- |
| Average # Days | Employee Type (Candidate Placement Type) | |
| Recruiting Time Stats | **Permanent Full Time** | **Temporary Full Time** |
| Time to Find |  |  |
| Management Decision Time |  |  |
| Time to Fill |  |  |
| Time to Start |  |  |

### Deliverables for Part C

1. In a new tab, complete the table above and ensure it is professional formatted.

## Part D: Selection and Correlations

The company is examining the different tools they use to help determine which pool of candidates should be hired. This is important because HR is trying to reduce the costs associated with poor hires and their underwhelming productivity.

In a study conducted over the years, HR has tracked the test scores of employees just before they were hired and their first-year work performance score.

You have been asked to create a report outlining each selection test and its correlation to the first-year work performance. This report should also rank the selection tests based on their correlation score. For example, a test should be ranked from 1 to 5 with 1 being the best test to predict future performance and 5 is the least likely.

For this exercise use the tab labelled, “Selection Data” to complete this question.

Use the =CORREL() formula to complete the correlations between the different selection tool scores and performance scores. ***Because of the scale when reporting correlations (between +1 and -1), all of your correlations should be reported with 2 decimal places.***

The report must contain the following data:

* Test name
* Correlation between selection test and actual performance (2 decimal places)
* Selection test ranking

### Deliverables for Part D

1. In a new tab, complete the report as directed above and ensure it is professional formatted.
2. Below the table indicate which one of the candidate testing methods above would you definitely keep and explain why?

# Rubric – 115 Marks

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Report | Report Elements | Excellent | Satisfactory | Needs Improvement |
| A) Estimated Labour Savings as a Result of Layoffs  (25 marks) | Inclusion of All Data  (10 marks) | All data elements have been included in the report.  (9-10 marks) | Not all but more than half of the data elements have been included.  (5-8 marks) | Half or less of the data elements have been included.  (0-4 marks) |
| Report Formatting  (5 marks) | The report is professionally presented making use of borders, cell shading and font formatting to draw the reader to important points.  (5 marks) | The report is professionally presented making use of some of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (3-4 marks) | The report is not professionally presented and does not make use of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (0 marks) |
| Data Accuracy  (10 marks) | All data is accurate without any mistakes. Percentages are rounded to 1 decimal place.  (9-10 marks) | More than half of the numbers are correct or percentages are not rounded to 1 decimal place.  (5-8 marks) | Half or less of the numbers are correct.  (0-4 marks) |
| B) Joining Multiple Tables Together  (35 marks) | Inclusion of All Data  (10 marks) | All data elements have been included in the report.  (9-10 marks) | Not all but more than half of the data elements have been included.  (5-8 marks) | Half or less of the data elements have been included.  (0-4 marks) |
| Data Accuracy  (15 marks) | All data is accurate without any mistakes. Financial data is formatted to “Currency” and is rounded to the nearest dollar.  (13-15 marks) | More than half of the numbers are correct or financial data is not formatted to “Currency” or is not rounded to the nearest dollar.  (8-12 marks) | Half or less of the numbers are correct.  (0-7 marks) |
| Use of Formulas  (5 marks) | Formulas have been used to connect tables for the analysis. Consistent formulas have been used and applied to all employees in each column.  (5 marks) |  | Formulas have not been used to connect tables for the analysis *or* filters have been used to input data *or* inconsistent formulas have been used for columns that require calculations.  (5 marks) |
| Report Formatting  (5 marks) | The report is professionally presented making use of borders, cell shading and font formatting to draw the reader to important points.  (5 marks) | The report is professionally presented making use of some of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (3-4 marks) | The report is not professionally presented and does not make use of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (0 marks) |
| C) Recruitment Metrics  (25 marks) | Inclusion of All Data  (10 marks) | All data elements have been included in the report.  (9-10 marks) | Not all but more than half of the data elements have been included.  (5-8 marks) | Half or less of the data elements have been included.  (0-4 marks) |
| Data Accuracy  (10 marks) | All data is accurate without any mistakes. Data is rounded to 1 decimal place.  (9-10 marks) | More than half of the numbers are correct or data is not rounded to 1 decimal place.  (5-8 marks) | Half or less of the numbers are correct.  (0-4 marks) |
| Report Formatting  (5 marks) | The report is professionally presented making use of borders, cell shading and font formatting to draw the reader to important points.  (5 marks) | The report is professionally presented making use of some of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (3-4 marks) | The report is not professionally presented and does not make use of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (0 marks) |
| D) Selection and Correlations  (30 marks) | Inclusion of All Data  (10 marks) | All data elements have been included in the report.  (9-10 marks) | Not all but more than half of the data elements have been included.  (5-8 marks) | Half or less of the data elements have been included.  (0-4 marks) |
| Data Accuracy  (10 marks) | All data is accurate without any mistakes. Data is rounded to 2 decimal places.  (9-10 marks) | More than half of the numbers are correct or data is not rounded to 2 decimal places.  (5-8 marks) | Half or less of the numbers are correct.  (0-4 marks) |
| Correct Conclusion of Selection Test  (5 marks) | Identified the most useful selection test correctly and explained why.  (5 marks) | Identified the most useful selection test correctly but did not explain why.  (3 marks) | Did not identify the most useful selection test.  (0 marks) |
| Report Formatting  (5 marks) | The report is professionally presented making use of borders, cell shading and font formatting to draw the reader to important points.  (5 marks) | The report is professionally presented making use of some of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (3-4 marks) | The report is not professionally presented and does not make use of the following elements: borders, cell shading and font formatting to draw the reader to important points.  (0 marks) |