

Development In Business Simulation & Experiential Exercises, Volume 21, 1994

Experiential Learning in Human Resources: A Performance Appraisal Application

Dawn Thorndike Pysarchik, Associate Professor
Michigan State University
104 Human Ecology Building
E. Lansing, Michigan 48824-1030
517-353-0650

Patricia Huddleston, Assistant Professor
Michigan State University
204 Human Ecology Building
E. Lansing, Michigan 48824-1030
517-353- 9907

ABSTRACT

This paper describes an experiential exercise appropriate for a human resource management course. While the focus of this exercise was to develop a performance appraisal system for either a retail employee or an officer in a student organization, the exercise could be used in other application settings. The background, procedures and discussion of the experience is discussed.

INTRODUCTION

The advantages to students of experiential learning using a case study approach are varied and far-reaching. The application of textbook concepts and theories to real life situations allows students to realign their parochial views of the real world, and become more effective problem solvers (Henshaw and Jackson, 1984). There is probably no other area in human resource management where experiential analysis is more important than in performance appraisal. To have a first hand knowledge of how employees view their job responsibilities and duties is critical to their productivity, and ultimately, their performance evaluation. For employees, an understanding of the performance evaluation criteria and process increases the chances of success on the job because expectations are clear at the outset. Additionally, the opportunity to work as a group member on a problem-solving project provides a myriad of experiences in negotiating group dynamics and effecting compromise.

While the number of human resource/personnel texts has expanded rapidly, the availability of human resource simulation and experiential learning materials is still limited. Kuzmits (1986) indicates that over 30 personnel/human resource texts exist, yet relatively few experiential exercise texts are available. This often means that instructors of human resource management courses must be very creative in developing their own experiential exercises to supplement course materials.

The Experience: A Case Study Approach

Students in a retail human resource management class at Michigan State University were given the opportunity to develop a performance appraisal system, including the instrument and the process, for (1) a retailer or (2) an officer in one of the student organizations. A choice of application was given because some students' career aspirations were to work in the retail business world, yet others' career interests were in agency or government work.

While the application options for the project were different, student organization or retailer, both presented similar and appropriate learning objectives for the exercise. Both application settings offered the opportunity for reinforcement of key course concepts and extension of the learning process through skill building (Cascio, 1989). The first application setting evolved after local retailers approached the instructor for student input in tackling some of their human resource concerns. In an attempt to prepare students to enter the complex and dynamic field of retailing, the instructor felt that this experience would present an excellent forum for application of course content. The Merchandising Management Association is a student organization of 125 members. The goal of this organization is to expose the members to professionals in business, to provide opportunities to visit major market centers and to promote professionalism in the organization's membership (Appendix A). There was dissatisfaction with the performance appraisal method for its executive board members, so the instructor of the human resource management course was approached to develop a performance appraisal system for its officers. Thus, the second application option emerged.

In developing the experiential options, attention was given to structuring and developing the projects such that they would closely parallel real life situations. Consequently, the faculty advisor for the club was involved in the development of the experiential project for the club officers and either human resource personnel or managers were involved in the development of the retail performance appraisals.

Because the overview of the project was extensive, students were divided into groups of four to six through a self-select process. In most cases, each group member was involved in all developmental steps of the performance appraisal to assure a holistic understanding of the project. The procedure utilized in each option was slightly different. Differences will be discussed separately.

Club Officers' Performance Appraisals

Each group electing to develop a performance appraisal for the student organization selected a different office. There were seven offices: President, Vice President, Director of Special Projects, Director of Correspondence, Director of Alumni Relations, Treasurer and Director of Promotions. The first step was to conduct a job analysis of the position the group had selected. The job analysis entailed a thorough review of the organization's bylaws (Appendix B), organizational structure and officers' current position descriptions, followed by in-depth interviews with the officer currently holding the selected office and the faculty advisor (Appendix C).

Development In Business Simulation & Experiential Exercises, Volume 21, 1994

Retail Employees' Performance Appraisals

Groups selecting to develop a performance appraisal for a retailing firm first identified the retailer and then the level of position they wished to study. Next, an in-depth interview was held with either the human resource manager or a person currently holding that retail position. Questions asked were similar to those in Appendix C.

PROCEDURES

After analyzing and synthesizing the Information gathered through the interviews, each group set out to develop the performance appraisal. Students were charged with reviewing class discussions of different approaches to performance review (for example, MBO, forced choice, BARS, BOS, and so on). After targeting two or three different performance appraisal techniques, students conducted further library research. Following analysis of the additional library information, groups developed both the appraisal form and the procedures for implementation.

Each group was responsible for developing a written and oral presentation of the project. The written project encompassed the development of the actual performance appraisal form and an analysis of several points: rationale for why the specific performance appraisal approach was selected; advantages and disadvantages of the approach; and situations in which the selected approach would be most and least effective (Appendix D). Each group prepared a ten-minute oral presentation and discussed the form, appraisal process, and rationale, advantages/disadvantages and situations in which the system would be most and least effective.

RESULTS

Groups developed a variety of different approaches to performance appraisal. Analysis of data gathered from the job analysis, class discussions and library research guided each group in the development of an appropriate appraisal. The following types of performance evaluations were developed for the student organization:

- President- - combination graphic rating scale and Management By Objectives (MBO) approach

- Vice President- -Graphic rating scale

- Treasurer- - Behaviorally Anchored Rating Scale (BARS)

- Director of Special Projects- - combination graphic rating scale and MBO approach

- Director of Correspondence- -BARS

- Director of Membership- -Graphic rating scale

Student groups developed a variety of different appraisals for retailers: sales associate- -rating scale, sales manager- - BOS, sales associate- -BARS. Two examples of performance appraisal forms are contained in Appendix E and F; one for a student organization officer and one for a retail employee.

EVALUATION

A discussion period followed each presentation with class members, club officers and the club advisor asking questions about the appraisal form and its implementation. Further, club officers and, in some instances, store personnel, were asked to evaluate the final appraisal system. The evaluation form used by the course instructor was given to each group in the class prior to submitting the project (appendix G).

Additionally, each group member completed a peer evaluation of their own and fellow group members' input on the project (Appendix H).

CONCLUSIONS

Regardless of the application option selected, students reported that both experiences allowed them to expand their understanding of course concepts. They also indicated that since they were focused on human evaluation, a straightforward "textbook application" was, in some instances, inappropriate. A systems approach and flexibility surfaced as key considerations. Therefore, several groups selected to blend two different performance appraisal approaches to provide for, in their estimation, an optimal performance appraisal system. Lastly, students felt motivated after having direct involvement in the development of a product to assist their "clients" in solving existing problems. Aside from the educational benefits of the experience, the students enjoyed working on the project.

APPENDICES

Appendices will be furnished upon request.

REFERENCES

Henshaw, Richard C. and James R Jackson (1984), The Executive Game Homewood, Illinois: Richard D. Irwin, Inc.

Additionally, each group member completed a peer evaluation of their own and fellow group members' input on the project (Appendix H). Kuzmits Frank E. (1986), Experiential Exercise in Personnel/Human Resource Management Columbus, Ohio: Merrill Publishing Co.

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