



**TWENTY-NINTH INTERNATIONAL SYMPOSIUM ON  
PUBLIC PERSONNEL MANAGEMENT**

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*Presiding Officer*

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Summary Report

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## I. Introduction

Delegates to the 29<sup>th</sup> International Symposium on Public Personnel Management met in Florence, Italy from May 9 through 13, 2004, to participate in discussions germane to the field of human resource management. The following countries and international organizations were represented:

Bahrain	Phillipines
British Virgin Islands	Samoa
Canada	Saudi Arabia
Commonwealth Association for Public Administration and Management	South Africa
Ethiopia	Taiwan
Germany	Tanzania
Kenya	Thailand
Korea	Trinidad & Tobago
Nigeria	United Nations
Pakistan	United States
	World Bank

The main discussion topics were Recruitment and Selection Techniques. Background discussion papers covering these two topics are appended to this summary report.

## II. DISCUSSION SUMMARIES

### *a. Recruitment and Selection Techniques*

Mr. Steve Nelson, Director of Policy and Evaluation of the U.S. Merit Systems Protection Board provided delegates with an overview presentation on recruitment and selection techniques, entitled *Recruiting and Selecting Highly-Qualified Job Candidates* (see Appendix A).

Mr. Nelson opened his presentation with a discussion as to why recruitment is important to develop a quality workforce that has the flexibility to grow and change with the organization. He emphasized that recruitment should always be a critical component of an agency's management agenda and is not about filling jobs that are currently vacant, but should be a long-term investment to build a quality workforce.

The changing workforce environment also highlights the importance of recruitment strategies. Mr. Nelson pointed out that the labor force demographics reveal a more diverse, older workforce that has different needs and expectations than 50 years ago.

There is a change in the nature of work, from manual to knowledge based, and the nature of the government is changing-- it is not as secure a career as was once viewed.

In addition, organizations need to address the possibility of an impending Human Capital Crisis. He noted that U.S federal government employers realize that the workforce is aging, nearing retirement age, with fewer young people to fill the pipelines.

### **Variability in recruitment trends**

Mr. Nelson spoke of the variations in recruitment activities undertaken by federal agencies. Research indicated that recruitment activities tend to vary depending on such things as: the amount of funding - in some instances ranging from 0 to \$10 million.

Generally, recruitment is considered a human resource function. At times hiring managers get involved, but the amount of involvement varies by organization. Most organizations have some type of recruitment process, but the number of recruiters and level of training varied substantially – from none to two weeks. The majority (60%) claimed to base recruitment decisions on planning and workforce analysis, but the extent varied greatly: from management feedback to full-blown competency assessment. Over 1/4 do not base their recruitment decisions on workforce analysis, and many (80%) use financial incentives but vary on the amount and how often used.

Mr. Nelson noted that what did not vary, was the increased attention recruitment has received over the past several years. Organizations are now more concerned about their ability to recruit the employees they need to accomplish their mission and have started acting on these concerns.

### **Factors affecting recruitment initiatives**

Mr. Nelson indicated that after many years of downsizing, the federal government began to increase its hiring.

There are a number of factors that affect how agencies design their recruitment programs.

- Formal, structured recruitment programs are developed for mission critical, high volume, and/or technical positions - where they can hire numerous candidates at a more economical rate.
- More informal approaches are utilized for non-technical and individual positions.
- Agencies usually centralize recruitment for high volume, mission critical positions and when developing corporate brands, marketing materials, and department-wide recruitment strategies.
- Decentralized recruitment is usually used for individual positions and for local activities, offering flexibility in tailoring approaches to meet specific needs.

## Recruitment strategies

Mr. Nelson also spoke about the types of strategies agencies use to recruit and the role these strategies play in recruitment programs. He listed some top recruitment strategies/programs.

- USAJobs (<http://www.usajobs.opm.gov>) the United States federal government's official jobs site, conveys an improved image of government employment and educates applicants about an agency and the advantages of working there.
- College visits and job fairs expand agency exposure to the public and build relationships that can be used continuously.
- Paid advertising helps to target job announcements at particular skills/groups, and
- Networking with professional groups helps both to build relationships and to target particular skills/groups

## Challenges

**External challenges:** Government tends to have less control over these factors.

- **Labor market shortages:** shortage of skilled professionals—for example, there is a shortage of nurses, and an increased demand for more nurses.
- **Salaries not competitive with private sector** – for example, for physicians and other highly skilled professions.

**Internal challenges:** Government has more control in how to address these factors.

- Image concerns – government agencies have to contend with an image of being stuffy bureaucrats, less innovative than the private and non-profit sectors, doing less challenging work, etc.
- HR has downsized, and has lost institutional knowledge. There is more reacting to crises and less capacity to plan for recruitment.
- Lack of money for visiting colleges, hiring recruitment staff, and building a pipeline before the workforce retires.
- Having a long complicated recruitment process and losing candidates because they do not understand the process or cannot wait for hiring decisions.

## Innovative approaches

Mr. Nelson highlighted some of the practices they found in their research study. A number of agencies indicated that recruitment planning is crucial to a successful program. It helps to identify program goals, the resources needed to implement the program, and provide indicators on the effectiveness of the program.

For example, the Internal Revenue Service (IRS) as part of its recruitment planning, conducted a workforce analysis, competency assessments, and market research to inform its recruitment strategy. It developed a 3-year recruitment and marketing plan that has helped meet 2001-03 hiring goals and increase the quality and diversity of the applicant pool. The IRS also focuses on measuring the impact of its recruitment strategies. It tracks expenditures, compares the costs to results of its efforts, and directs resources to the most effective and efficient activities based on its assessment.

Using partnerships to leverage resources is also important. The Partnership for Public Service's (<http://www.ourpublicservice.org>) *Call to Serve* program provides a valuable service to rebuild relationships between agencies, colleges and universities through career fairs, information exchanges and best practice research.

Mr. Nelson emphasized that the manner in which organizations market themselves and build relationships with candidates is extremely important to the effectiveness of the overall recruitment program. Appearing disorganized or unprofessional would only serve to enhance the negative image of the federal government.

## **Recommendations**

Based on the findings from their study and on information from organizations with innovative practices, Mr. Nelson said they developed a number of recommendations that should help agencies focus and improve their recruitment programs:

- Get leadership support. Leadership needs to make recruitment a priority, allocating resources, and obtaining commitment of sub-components.
- Be proactive and plan for workforce needs rather than reacting to individual vacancies. Otherwise organizations will always be in crisis mode.
- Market the organization in an enticing, professional manner. Know your recruitment sources, develop professional, understandable marketing materials, and be proactive in seeking out qualified candidates.
- Build a resource base even if not hiring. This provides a valuable source once vacancies open up.
- Educate candidates. Communicate clearly the process of applying. Make the hiring process a good experience.
- Streamline processes. The best way is through technology, but look for other opportunities. Do not try to replace human contact with technology. Interaction helps keep applicants interested.

- **Measure.** It is important to manage costs and resources. Evaluating the success of strategies is important to identify the best return on investment.

Mr. Nelson discussed that the current recruitment process in the federal government was built around a model that incorporated what has been known as the ‘rule of three’- this assumed a valid and robust rating procedure that accurately determined the relative ranking of applicants. The new management flexibilities act will allow agencies to use categorical ratings instead of being bound to the rule of three. The U.S. Office of Personnel Management(OPM) is currently drafting regulations concerning the use of categorical ratings.

Mr. Nelson also discussed the need for vacancy announcements to be simpler and straightforward, encouraging the right people to apply, and that minimum qualifications should not be the basis for selection. Instead government wants the person who has the best relative potential to perform the job.

### **Validity of Personnel Measures**

How can government best assess the potential of candidates to perform on the job? Mr. Nelson stated that assessment tools are not equal in terms of their ability to predict performance. In the government, for a variety of reasons, the trend has been to use the least costly and, unfortunately the least useful types of assessment. However, there are significant downsides to doing this.

### **Use of Automation as Part of a Broader Staffing Strategy**

Mr. Nelson discussed the importance of using automation as part of a broader staffing strategy. Automation is used for reasons such as:

- Precision – the ability to identify the best candidates from a large pool,
- Accuracy – applicants are rated appropriately, and
- “Intelligence” – systems make judgments previously made by HR professionals.

Proper implementation of automation can improve the quality of hiring. He highlighted the benefits of automation:

- Better applicant pool - more applications, less “loss” of good candidates.
- Greater depth - collect information on specific skills, performance of specific tasks.
- Greater breadth –being able to rate candidates on more competencies.

However, he cautioned automation does not guarantee quality. For instance, systems cannot conduct job analysis—a knowledgeable user is essential. Systems are only there for support, not to ensure adherence to merit principles.

Mr. Nelson in concluding his presentation gave participants some key pointers on how to build and sustain a successful recruitment strategy.

- He reiterated that faster did not necessarily translate into better. Leaders, managers and HR must agree on priorities; understand their respective roles; and be *expected* to fulfill those roles.
- Cheaper also does not mean better. Leaders must recognize the importance of hiring; distinguish recruitment from assessment, have realistic expectations; and be willing to invest in effective strategic solutions.

He spoke of the validity of selected assessment methods. The key is content. Good selections require selection criteria, assessment methods and rating procedures. Also, the use of technology brings with it challenges—for example, more applications and heavy reliance on self-rating. Managing the automation process is crucial. Introducing an automated system affects people, processes and policies.

Mr. Nelson also recommended that the use of structured interviews is still a very important part of the hiring process. It is still highly influential in the selection process, as it allows for the opportunity to observe job candidates and assess them more thoroughly. Structured interviews closely links the interview to job requirements, allows for consistency and higher predictability for on-the-job performance.

Mr. Nelson also recommended conducting reference checks as an important part of the recruitment process—to verify the truthfulness of applicants and their competency for the job. He emphasized that it was important for organizations to structure questions to job related competencies.

The questions posed to symposium delegates to discuss in their groups focused on the recruitment and selection techniques being undertaken in their respective countries as it related to: recruitment and selection challenges; successful techniques being utilized, use of technology for recruitment processes; the centralization/decentralization of the process; experiences with labor shortage/surpluses; and combative measures being used.

## Recruitment and Selection Strategies of Symposium Delegates

There were some recurring themes emerging from the discussions regarding the recruitment challenges facing several of the representatives. One of the main challenges was the attraction and retention of key talent in the public service. This was apparent for all representatives from both the developing and developed countries. Political and cultural history, traditions, governance and economic conditions shapes the recruitment process for many of the representatives.

Participants shared challenges with regard to:

- Young graduates not seeking to pursue careers in the public service due to the negative image the public has of the government.
- Inability to compete with the private sector and other external sources with regard to compensation.
- Loss of skilled professionals to other countries with more favorable conditions and compensation levels and resulting scarcity/shortages of applicants for specialized vacancies (for example, doctors, nurses, engineers, scientists)
- Leadership that fails to embrace / support reform initiatives.
- Difficulty in determining the appropriate set of skills needed for current and future needs, and developing the necessary competencies to meet those needs.
- Excessive centralization of the recruitment/ selection process and/or fragmentation of the function.
- Ensuring the quality, competence and ethical standards of those in charge of the process.
- In certain countries, there is a large supply of talented graduates who are unable to find jobs, due to a hiring freeze.
- Lack of transparency in selection as a result of nepotism incidents.
- Lack of proper succession management.
- Overly complicated and bureaucratic recruitment processes.
- Lack of proper infrastructure to develop automated HR systems, especially in some developing countries, and consequent difficulty in identifying available skills, and speeding-up the recruitment/selection process.
- The difficulty of choosing between candidates with “*life*” experiences but few academic qualifications and those with appropriate academic qualifications.
- Establishing equity in the recruitment/ selection process to address imbalances, as it pertains to racial, ethnic, gender, urban/rural factors.
- Budgetary constraints.
- Having the human capacity throughout the organization manage the process efficiently and effectively.

One very important issue raised by some participants was the challenge of changing the mindset of public servants at all levels to facilitate innovation, build a knowledge base and adapt to reform efforts. Representatives mentioned that there was a tendency for officials to revert to established laws, policies, rules, and regulations.

### **Strategies being implemented**

Despite the major challenges and/or limitations facing the representatives, there were indications that many were proactively making efforts to improve or enhance their recruitment processes. There were indications of:

- Decentralizing the recruitment/selection function.
- Using assessment centers for recruitment into leadership positions.
- Establishing workshops and institutes to train potential candidates.
- Recruiting, on contract, senior executives and persons possessing skills that are scarce.
- Instituting planned staff departmental rotation to broaden competency and facilitate succession.
- Striving to tailor recruitment/selection strategies to meet changing organizational and environmental needs.
- Introducing ISO and other standards into the civil service.
- Offering incentives, for example, early retirement, to persons in redundant positions thus facilitating the entry of new, better-qualified hires.
- Utilizing the internet and other technological vehicles to reach a larger audience.
- Targeted recruitment efforts-utilizing associations, universities, and professional bodies and direct head hunting (i.e. targeting specific professionals to fill a specific need).
- Offering incentives- bonuses, and special packages.
- Moving away from the “Rule of Three” and ranking according to job related requirements.
- Developing and utilizing competencies to select candidates.

### **Centralization vs. Decentralization**

Centralization or decentralization was a situational issue, depending on the size of the organization and the scope of activities. Larger organizations tend to have hiring decisions decentralized to line managers, but the central agency would still maintain a “watch dog” position to ensure efficiency and accountability to established standards. In some cases, there were instances of the combination of both centralization and decentralization of recruitment efforts.

## **Internet and other Technology**

While most organizations are utilizing some form of technology to enhance the recruitment and selection process caution was expressed since it is important to know which strategy is best for each organization.

## **Labor shortages and surpluses**

For those countries experiencing labor shortages, there have been attempts to develop specialized training programs to fill gaps. The issue of the aging workforce and not enough younger people to fill positions, points to the urgent need to look proactively for solutions to this problem. In some countries, rehiring of older workers as consultants or employees has become one solution. HIV/AIDs, another major concern, is already having and will have repercussions on the labor market for some of the developing countries.

Where there are countries with labor surpluses, this is usually being addressed by: redistribution of skills—for example in some developing countries, encouraging local people, to become farmers, re-skilling of individuals, and reducing hiring in some areas.

## **Conclusion**

As one of the groups aptly stated in their presentation on recruitment and selection, “there is no *one-size-fits-all* solution to recruitment/selection problems. Successful organizations need to use recruitment mechanisms that select candidates with the capacity and the flexibility to align their skills with the organization’s goals and direction.”

It was evident from the sharing of experiences and insights into the different countries’ processes, that all participants are involved in situations that are uniquely different. However, the symposium participants were in general agreement that, in order for the recruitment and selection process to be successful, each organization’s process has to be driven by clear policies, accountability, shared responsibility, and most importantly by professionals and systems which have the capacity to deliver.

## ***b. Human Resource Service Delivery***

Ms. Karina Constantino-David, Chairperson of the Philippine Civil Service Commission gave an overview presentation on *Human Resource Service Delivery* (see Appendix B).

Ms. Constantino-David framed the discussion by exhorting symposium participants to consider Human Resource Delivery within the context of their countries specific realities, whether political, social or economical and that arbitrarily copying processes or elements from other countries will not provide the answer to the effective delivery of human resources services.

In the case of the Philippine's experiences with Human Resource Service Delivery, Ms. Constantino-David discussed: why human resources has not been accorded the importance it deserves; the governing principles of what can be done; and the Philippine's own experiment in executing HR service delivery.

She mentioned that personnel or human resources tends to be the largest cost factor, consisting mainly of: compensation, training for human capital; discipline, recruitment and retirement planning, so it would be logical that human capital managers would be centrally important.

However, she emphasized, despite the enormous responsibility of the personnel arm of the government, public servants are viewed not as assets, and "HR people are relegated to the margins." She explained that this is a result of the political leadership of the country, and the tendency for:

- Terms of office which delimit perspectives to short-term,
- Power and stature to distort priorities,
- Politics of personality and popularity to overshadow platforms and direction, and
- Heavy bureaucratic implementing processes.

As a result, there is growing cynicism from the public, who are demanding service without appreciation of constraints facing public servants. The public also views the civil service as incompetent and highly corrupted.

On the other hand, public servants themselves are accepting of their "powerlessness", deriving their effectiveness only from following bureaucratic rules. They tend to feel demoralized, underpaid, unrecognized, and inefficient, and are not driven to be committed. They have become apathetic.

She argued that the resulting impact is that human resources has not been able to prove its strategic value. Human resource professionals have become trapped within bureaucratic rules, and remain administrative machines or problem solvers, rather than strategic thinkers.

Ms. Constantino-David argued that there is the tendency for some countries to gloss over culture and context in seeking a solution to their HR issues. Some developing countries tend to copying developed countries, which leads to blind adoption of HR trends that are divorced from country-specific realities: for example, as it relates to information technology, performance management or quality systems.

She outlined some governing principles as to how countries should approach the issue of human resource delivery:

- Attempt to become more of an enabling rather than a disabling profession,
- Move from being problem-solving and administrative to utilizing more comprehensive analysis and systemic attacks,
- Become more assistorial instead of regulatory,
- Move from adjunct/follower/implementor to a relative autonomy/source of expertise, and
- Reclaim the HR mission and rediscover commitment and accountability.

According to Ms. Constantino-David, these types of changes require the following paradigm shifts in the current bureaucratic systems:

- From hierarchy to collective responsibility,
- From tasks to outcomes and networking,
- From discipline to mediation and conciliation,
- From competency-based to integrity, motivation, and capacity for longer-term growth, and
- From doing human resources, to actually marketing human resources.

She also outlined some of the attempts in the Philippines to achieve this paradigm shift. They have implemented:

- Anti-corruption initiatives,
- Lifestyle checks on senior executives, enlisting the public's support to report unethical/ corrupt activities,
- Improvement in frontline services,
- The executive service serves as role models. Training is available in ability-based categories, creating parallel senior levels, for example, managerial, highly technical, scientific, foreign service, etc.,
- Decentralization of HR functions- training, incentives to agencies depending upon quality of HRMO and prescribed systems in place, and
- Developing partnership with public service unions– to formulate effective governance, anti-corruption and frontline service.

She also mentioned some major interventions:

- The creation of an HR database,
- Linking compensation and performance,
- Establishing a recruitment philosophy, guided by the principles of: integrity, motivation, capacity, understanding, knowledge, and experience in candidates
- Rationalizing government structure without sacrificing people, and
- Marketing the image of the Civil Service Commission as a champion.

The questions posed to symposium delegates to discuss in their groups, focused on the human resource delivery processes in their respective countries, as it related to: changes, if any, to their HR service delivery processes; challenges they have encountered in effectively carrying out their HR service delivery functions; types of HR systems or web-based technologies being used to transform HR into a more strategic role; the outsourcing of any HR functions; and the centralization/decentralization of their HR systems.

### **Human resource service delivery strategies of symposium delegates**

The discussions in the various groups on HR service delivery strategies, highlighted Ms. Constantino-David's discussion that HR service delivery is shaped by country-specific concerns and challenges.

Some of the changes countries have made to ensure effective delivery of HR services include:

- Emphasis on training and capacity building.
- Auditing of HR processes.
- Delegation of certification/accreditation.
- Development of performance measures and standardization of policy enforcement.
- Decentralization/centralization of certain processes.
- Establishment of periodic reporting- to ensure accountability.
- Establishment of HR strategic plans where none existed and allocating resources according to established strategic plans.
- Appropriate placement of HR functions – i.e. shared responsibility of strategic functions.
- Established role of managers and politicians in charting the course.
- Automating of HR processes.
- Establishment of e-government projects to improve transaction accuracy.
- Establishment of citizen forums -the public is now more involved in decisions and monitoring of agreements.
- Establishment of service charters, which are posted in public areas.
- Introduction of ISO standards (to ensure quality assurance of service delivery – Bahrain
- Partnering with unions

For some countries, political and social changes forced the need for major policy changes in the functions and duties of the public service commission. Monitoring and performance measures had not been previously developed, and a new more centralized department that decides policy and issues guidelines has been established. This is to ensure that there is uniformity both nationally and provincially in implementing procedures. So far, this is working efficiently and systems have been established to check on irregularities and to ensure accountability.

### **Challenges to HR service delivery**

Permeating throughout all discussions, the major challenge facing all delegates appeared to be HR making that paradigm shift to becoming more strategic and credible. In some cases, how to change the perception from “personnel” to “human resources.”

Other major challenges included:

- Streamlining HR processes to become more efficient - how to ensure efficient delivery of services and accountability and ensure uniformity of delivery across departments and agencies.
- Despite introduction of technology, the many constitutional rules/bureaucracy in some countries still causes inflexibility in effectively carrying out services.
- Having technological databases, but unable to keep up with rapid changes in technology- too many upgrades.
- Having line managers and HR working together as a team to execute established standards.
- Need to retrain HR practitioners to take on new roles.
- Inability to automate due to infrastructure limitations in most developing countries.
- Resistance to change from HR practitioners, fear of the unknown and what the changes will bring.
- Mentality has to be changed as it relates to accountability, especially with the creation of standards and charters in most countries where there was no accountability.

Linked to the issue of accountability, is the challenge some countries have in dealing with rampant corruption. In some situations, there are even safety risks associated with disclosure of corrupt practices and individuals.

In some cases, delegates mentioned that there is a shortage of HR staff to deliver services effectively. In other instances, frequent changes in management and leadership disrupts continuity of procedures and policymaking.

### **To outsource or not to outsource?**

The outsourcing of functions for most delegates was dependent on a number of factors:

- Costs – if it was more cost effective or resources were not available to perform the function in-house then a particular function was outsourced. For some organizations, common services outsourced were: recruitment, IT, payroll systems, benefits administration, compensation and classification, training, employee assistance programs (EAPs), research and in some instances the entire HR function.
- How to measure results properly.
- Ensuring continuity of services since an outside vendor would be executing the service.
- Tailoring “ready made” packages.
- The impact on the credibility and morale of existing HR staff if other HR functions have been outsourced.
- The need to have consistency with the strategic direction of the organization.
- Union reactions to outsourcing.

Some of the benefits highlighted that resulted from outsourcing included:

- Access to skills not present in the organization,
- Flexibility,
- Allowing HR to focus on core business issues,
- Cost effectiveness, and
- Improvement in productivity and effectiveness.

### **Centralization/Decentralization of HR systems**

As with the issue of centralization and decentralization in the recruitment process, the decision to centralize or decentralize is closely tied to establishing a structure that allows for a more efficient service delivery process. In taking on a more strategic role, many organizations have decentralized more routine human resource functions to line managers and now maintain more of a “consultancy” type role.

In a number of cases, delegates indicated that their HR department establishes the policies and guidelines, and officials in line departments carry out the various activities, such as recruitment. HR however still monitors and evaluates activities to ensure conformity and that standards are maintained.

Decentralization speeds up the process of decision-making—for example, vacancies can be filled more quickly when the hiring department is in control of their own recruitment

needs. However, a disadvantage to the decentralization of some HR activities is the difficulty in *ensuring* the conformity to standards.

## **Conclusion**

It was evident from the discussions on human resource service delivery that delegates from all countries are in a transformational mode when it comes to being effective and more strategic in their HR roles. All participants recognized the urgency and importance for HR to transform itself to become more effective and credible to its constituents, both internally and externally, by exploring various strategies that are consistent with their social, political and economic realities.

### **III. United Nations Expert Group Meeting on Unlocking the Human Potential for Public Sector Performance**

John-Mary Kauzya, Chief of Governance and Public Administration Branch, Division for Public Administration and Development Management, United Nations gave a presentation on the issues discussed at the United Nations Ad Hoc Expert Group meeting held in Florence, Italy, on *Unlocking the Human Potential for Public Sector Performance*.

In 2001, the United Nations Program on Public Administration and Finance, since renamed the Committee of Experts on Public Administration (CEPA) recommended the publication of periodic World Public Sector Reports. These reports are intended to review major trends and issues concerning public administration and governance. The reports also are expected to analyze challenges faced by governments in reforming specific areas of the public sector, and to highlight good practices in public administration that can serve as useful reference to other countries. The first report focused on Globalization and the State. E-government at the Crossroads was the theme of the second World Public Sector Report. Recognizing that maximizing human resource capacity is critical to the revitalization of the public service, CEPA recommended that the next report focus on human resource management. The objectives of this World Public Sector Report are to:

- Provide a high quality and original analysis of important human resources-related challenges affecting the performance of the public sector, with particular focus on developing countries and countries in transition.
- Raise the awareness of the critical importance of effective human resource management in the public service in developing and transitional countries.

As a result the Ad Hoc Experts group meeting was held in 2004 to assist in the preparation of the world public sector report.

## Themes

Mr. Kauzya identified the following main themes of the meeting:

1. Current challenges and trends in human capital management,
2. Building a more professional, responsive and neutral public service, and
3. Leadership capacity development strategies in the public service.

## Challenges

The committee of experts identified major challenges they saw facing the public sector arena, and which Mr. Kauzya noted were consistent with the challenges symposium delegates said they faced in the group discussions on Recruitment and Selection. These are:

- Brain drain
- Erosion of managerial and technical capacity
- Changing labor markets
- Loss of pride in the concept of public service
- Increased politicization
- Decline in the standards of professionalism
- Gradual decay of national governance systems
- Aging workforce
- Migration and diversity
- HIV/AIDS

Additional challenges covered four basic themes:

1. Public service technical and managerial capacity – attracting and maintaining qualified people; role definition; strengthening managerial and technical capacity; performance management; benchmarking; measuring ROI; and a robust HR function.
2. Responsiveness and Accountability – working across boundaries; performance management systems; standard setting; diversity (representative and inclusive); tackling cynicism; and revitalizing the public sector identity and image.
3. Public Sector Values- revitalizing public sector identity and distinctiveness; codes of conduct; encouraging and sustaining loyalty and ethical practice; tackling nepotism and partisanship; and modeling values.
4. Role, Status and Capacity of HR Function – Strengthening HR role and influence; structural positioning; strengthening/revitalizing HR capability; and adequate resources.

## **Recommendations**

Mr. Kauzya also discussed the following recommendations made by the committee:

- Re-examine and address the issue of remuneration,
- Encourage adoption of flexible and merit-based pay systems,
- Re-examine the nature of employment contracts,
- Examine composition and balance between small core of career vs. position based civil servants, and
- Strengthen the HR function.

He also cited some areas that the committee identified as needing further research:

- Developing a HR database on personnel in the public service.
- HIV incidence and impact on service delivery.
- Defining the public service: is there any common ground?
- A comparative approach to the HR function.

## **IV. Ethics and Values**

Janos Bertók, Principal Administrator, Public Governance and Territorial Development Directorate, Organization for Economic Cooperation and Development (OECD) lead a discussion on Ethics and Values. Mr. Bertok's presentation is included in Appendix C. According to Mr. Bertok, ethics is important because there is declining confidence in public institutions throughout the world. Ethics has become a key factor in the ability of government to meet a rapidly changing environment. Countries need to develop an ethics infrastructure that promotes a new public service culture. Mr. Bertok believes that the integrity of politicians and public servants is a critical ingredient in a democratic society.

Mr. Bertók discussed an ethics infrastructure that included a legislative framework that provided accountability and control, codes of conduct that provide guidance, and a coordinating body that managed the system. The most important factor, according to Mr. Bertók is the commitment of the political leadership. There also is a need for public involvement and scrutiny.

Mr. Bertók described a growing trend towards a new public service culture that included a modern mission for the public service that meets expectations and redefined values that underpin the public sector operations in the changing environment. He indicated that the public service core values include:

- Impartiality
- Legality

- Integrity
- Transparency
- Efficiency
- Equality
- Responsibility
- Justice

When putting values and standards into effect, Mr. Bertok stressed the importance of communication, training to raise awareness and develop the skills for handling ethical dilemmas, providing advice from management as well as external sources, involving staff, and the use of technology including the internet and interactive CD-ROMs.

The presentation included a description of how OECD member countries use human resource management to create a supportive ethical environment and the following factors were cited:

- Recruitment based on merit
- Ensuring the openness of selection
- Developing clear rules for recruitment/promotion
- Publishing a list of vacant positions
- Publishing recruitment rules
- Auditing/monitoring selection procedures
- Ensuring published criteria for recruitment
- Considering ethics in performance appraisals
- Considering ethics in recruitment


Mr. Bertok discussed the conflict of interest guidelines that have been developed by the OECD to help government institutions develop an effective policy in this area. The guidelines are designed to create a practical reference framework. He stressed that conflicts of interest do not necessarily constitute corruption but they are potentially damaging and dangerous so they must be managed. He cautioned that a conflict of interest situation which is not identified, managed and resolved appropriately could lead to corruption.

Mr. Bertok cited several conditions that are necessary for success when reforming the ethics and values of an organization that included:

- Developing ownership of the reform measure through consultation with stakeholders, communication through the media and the involvement of civil servants.
- Empowering both public servants and citizens to report misconduct.
- Integrating integrity measures into the overall management of the organization.
- Shifting the emphasis from enforcement to prevention.

Additional information on the work undertaken by the OECD on ethics in the public service can be found at: <http://www.oecd.org/gov/ethics>.

**Steve Nelson – U.S. Merit Systems Protection Board Overview Presentation:  
*Recruiting and Selecting Highly-Qualified Job Candidates***



Recruiting and Selecting  
 Highly-Qualified Job Candidates

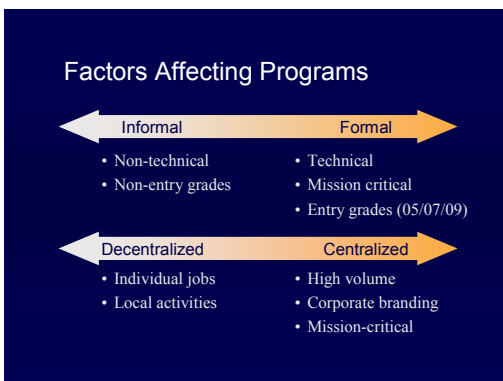
Steve Nelson  
 U.S. Merit Systems Protection Board

29th International Symposium  
 on Public Personnel Management  
 Florence, Italy  
 May 10, 2004

- Discussion Topics
- Reaching Potential Applicants
    - Agency recruitment programs
    - The use of Federal vacancy announcements
  - Assessing Candidate Potential
  - Proposed Staffing Processes Using Automation
  - Using Structured Interviews
  - Reference Checks

- Why Recruitment Matters
- Need to build a quality workforce
    - For the long term
    - That can change with the organization
  - Need to address changing workforce environment
  - Need to address HC Crisis

- The Trend: Variability
- Increased attention, varying execution –**
- Varying sources and levels of funding
  - Varying roles – but HR usually takes the lead
  - Varying levels of recruiter training
  - Varying levels of planning and analysis
  - Varying use of financial incentives



Factors Affecting Strategy Usage

Strategy	Purpose
Web site/USAJOBS	Convey an improved image to the public and educate applicants on benefits of working for the Government and how to apply.
College Visits and Job Fairs	Expand agency exposure and rebuild relationships with colleges, universities, and the public.
Paid Advertising	Target specific trade and/or professional audiences.
Professional Networks	Network with related professional organizations to identify potential applicants and recruitment sources.

## Challenges Cited

### External

- Labor market shortages (some occupations)
- Higher salaries

### Internal

- Image
- Lack of HR capacity
- Budget constraints
- Complex hiring process
- Lengthy hiring process

## Innovative Practices



Practice	Example
Top-level support	NASA – “One NASA” approach to recruitment, supported by Administrator Sean O’Keefe
Top-level involvement	DFAS – Director accepted speaking engagements, visited colleges, and met with applicants

## Innovative Practices



Practice	Example
Planning	IRS – Written plan driven workforce analysis, competency assessment, and market research
Partnerships	Partnership for Public Service – “Call to Serve” network provides access to career fairs, colleges and universities, and best practices.
Evaluation	IRS – Tracks expenditures on and results of recruitment strategies to direct resources to most effective activities.

## Innovative Practices



Practice	Example
Build Capacity	NASA – SHARP program aims to increase number of students in science, technology, and engineering.
Build Relationships	GAO – Assigns senior executives and a recruiting team to targeted colleges and universities.
Branding & Marketing	SSA – Materials built around a single “tag line” and targeted to specific needs and audiences.

## Innovative Practices



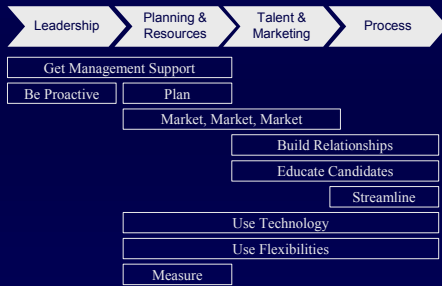
Practice	Example
Streamline	Recruitment One-Stop – Will enable applicants to store résumés and use them to apply for most Federal jobs
Demystify	State – “Chat room” for prospective Foreign Service Officers to discuss the exam process and life in the Foreign Service
Keep Moving	U.S. Geological Survey – HR reviews applications and refers candidates 7 days after the announcement closes – or sooner

## Innovative Practices



Support from the Secretary	Human Capital Plan	Targeted Recruitment	Streamlined Announcement
Financial Incentives		Automated Application	
Career Intern Program		Category Rating	
DOL’s MBA Fellows Program combines several practices and programs.			Structured Interviews

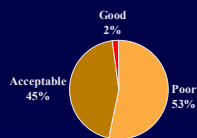
## Recommendations



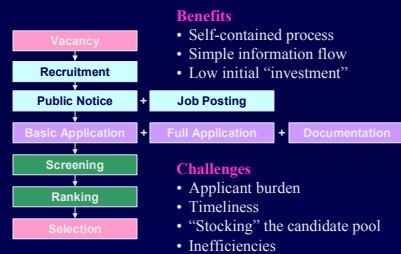
## Common Problems in Vacancy Announcements, Cont.

- Excessively burdensome application requirements
- Vague instructions
- Limited methods to apply
- Announcements are focused on meeting laws and regulations rather than recruiting

## Quality of Vacancy Announcements is Generally Not Good



## Traditional Staffing Process



## Common Problems in Vacancy Announcements

- Announcements read poorly
  - Misspellings and grammatical errors
  - Jargon and acronyms are prevalent
  - Templates and "canned" language are ineffectively used
- Announcements are weak recruiting tools
  - Titles and duties are often unclear
  - Qualification requirements are not specific
  - Announcements are negative and even threatening
  - Announcements are not applicant centered

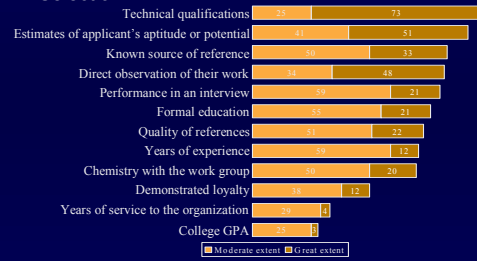
## Common Problems in Vacancy Announcements, Cont.

- Excessively burdensome application requirements
- Vague instructions
- Limited methods to apply
- Announcements are focused on meeting laws and regulations rather than recruiting

## Other Serious Problems With Vacancy Announcements

- Many agencies lack a comprehensive recruiting strategy
  - Exclusive reliance on USAJOBS to announce jobs
  - Using announcement for a broad range of jobs
  - Canceling announcements
- Many agencies lack a comprehensive assessment strategy
  - Heavy reliance on previous work experience
  - Use of vague or restrictive qualification requirements

## Percent of Supervisors Who Believe Specified Factors is an Important Consideration for Selection



Source: MSPB, "The Federal Merit Promotion Program: Process Vs. Outcome," p. 13.

## Validity of Personnel Measures

Personnel Measures	Validity
Work Sample Test	.54
General Mental Ability (GMA) Tests	.51
Structured Interviews	.51
Job Knowledge Tests	.48
Job Tryout Procedure	.44
Unstructured Interviews	.38
Biographical Data Measures	.35
Job Experience (Years)	.18
Grade Point Average (GPA)	.17
T&E Point Method	.11
Years of Education	.10

## High Quality Selections are Probably Best Supported by a Process That Involves a Series of Successive Hurdles

- Applicants are screened for basic qualifications at the first hurdle
- Applicants passing the first hurdle then assessed in a more rigorous manner to determine the best qualified



## Categorical Grouping – What Is It?

An alternative to the "Rule of Three" that –  
 Can give managers more freedom selecting among good candidates  
 Has been shown to work  
 MSPB has advocated for years

## Categorical Grouping – How It Works

"Rule of Three"	Categorical Grouping
Candidates are evaluated against job-related criteria.	✓ Candidates are evaluated against job-related criteria.
Candidates are assigned numerical scores and ranked.	✓ Candidates are assigned to one of three quality groups.
The manager selects from the top 3 candidates, observing veterans preference.	✓ The manager selects from the top group, observing veterans preference.

## Use of Automation as Part of a Broader Staffing Strategy

- Consider “multiple hurdles” strategy
  - Balances thoroughness with reasonable demands on candidates, time, and money
  - Automation useful for initial hurdle(s)
    - Efficient - handles volume well
    - Low cost for applicant and employer
    - Distinctions are broad (e.g., good candidates vs. “non-starter”), not precise

## Factors Supporting Automation

- Maturation of the Internet
  - Expanded public access
  - Widespread acceptance
  - Availability of Web-based applications
- E-government initiatives
- Drive for efficiency
- Agency willingness to help applicants submit applications

## Observations

- Agency expectations often too high
  - Precision – ability to identify the best candidates from a large pool
  - Accuracy – applicants are rated appropriately
  - “Intelligence” – systems make judgments previously made by HR professionals

## Observations

- Center on assessment of training and experience
  - Question and Answer about T&E
  - Resume Searching and interpretation
- Some also accommodate written tests

## How the Systems Work

- Three types of assessment
  - Eligibility and status (not job-related)
  - Minimum qualifications
  - Relative qualifications
- Two models
  - Resume-driven
  - Question-driven

## Many Common Features

- Support for phased assessment (e.g., combining structured interview scores with earlier assessment scores for final rating)
- Ability to create and use applicant profiles (“Register once, apply often”)
- Provide for an applicant tracking capability for both diversity and research purposes
- Interface with USAJOBS
- Fast, consistent rating of applications

## Automation has Much Potential

- Speed
- Economies of scale
- Mechanical consistency
- Fineness of detail
- Communication with managers and applicants
- Records management
- Evaluation of processes and outcomes

## “Faster” ≠ “Better”

“Recruiting and hiring the most qualified individuals takes time, but is critical to the [Securities and Exchange] Commission’s success.

We have refused to hire employees simply to fill chairs, but rather are focused on hiring the best and most appropriate people to fill these important positions, and are keenly focused on where each staff person can do the most good.”

Source: Testimony of William H. Donaldson, Chairman of the SEC, before the United States House of Representatives, March 31, 2004.

## Automation Does Not Guarantee Quality

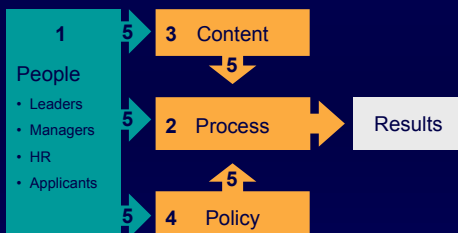
- Systems cannot conduct a job analysis
- Knowledgeable user is essential
- Systems cannot “learn” from experience
- Systems can only support—not ensure—adherence to merit principles
- “Garbage in, garbage out” applies

Ultimately, accountability lies with managers, not systems

## Good Implementation can Improve Quality

- Better applicant pool - more applications, less “loss” of good candidates
- Greater depth - collect information on specific skills, performance of specific tasks
- Greater breadth - rate candidates on more competencies

## Keys to Success



## “Faster” ≠ “Better”

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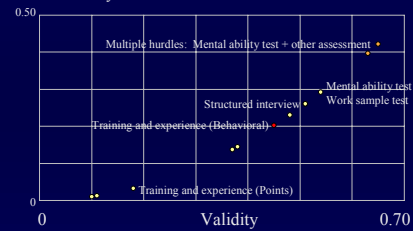
Source: Testimony of William H. Donaldson, Chairman of the SEC, before the United States House of Representatives, March 31, 2004.

## Key #1: People

- Leaders, managers, and HR must:
  - Agree on priorities
  - Understand their roles
  - Be expected to fulfill those roles
  - Be able to fulfill those roles

## The Validity of Selected Assessment Methods

Predictive Ability



Source: Schmidt, Frank L., and John E. Hunter, "The Validity and Utility of Selection Methods in Personnel Psychology: Practical and Theoretical Implications of 85 Years of Research Findings," *Psychological Bulletin*, vol. 125, No. 2, 1998.

## Key #1: People

- Leaders must:
  - Recognize the importance of hiring
  - Distinguish recruitment from assessment
  - Have realistic expectations
  - Be willing to invest

## "Cheaper" ≠ "Better"

"Employees are such a bargain, and hiring costs are such a small percentage of an employee's value, that fretting over the cost of a hire is like agonizing over whether the gumball machine will give you seven or eight gumballs for a nickel. Who cares?"

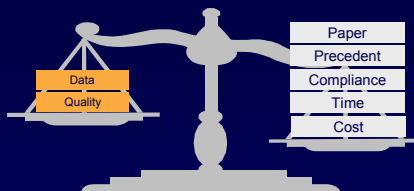
Measuring the cost of each of your hires is one way to spend time. It takes a lot of it. Don't do it. It's a waste.

Instead, every HR and recruiting pro should spend time measuring what a top employee is worth. Compare that to what an average employee is worth, then sprint to your CFO's office with the numbers."

Source: Todd Raphael, "Cost per hire: don't even bother," *Workforce*, June 2002

## Key #2: Process

- Default: automate the existing process
- Question: What factors drove that process?



## Key #3: "Content"

- Good selections require good "content" –
  - Selection criteria
  - Assessment methods
  - Rating procedures
- "Translating" content is not easy
- Existing content may be deficient

### Key #4: Policy

- Technology brings challenges:
  - Electronic application
  - More applications
  - Heavy reliance on self-rating
- Technology is not the answer
- “Business as usual” is not the answer

### Key #5: Change Management

- Hiring is a complex business
- Introducing an automated system affects –
  - People
  - Processes
  - Policies
- “Planned” works better than “*ad hoc*”

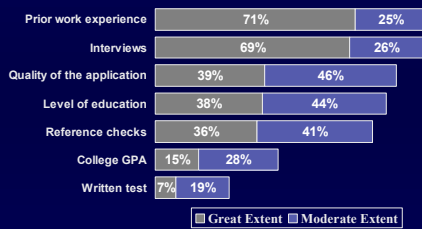
### Recommendations to Agency Leaders



### Interviews Are Important

- Near-universal part of the hiring process
- Used at one or more stages
- Highly influential in the selection decision

### Percent of Supervisors Using Various Types of Information in Selection Decisions



Source: U.S. Merit Systems Protection Board, 2000 Merit Principles Survey.

### Possible Reasons for Influence

- Opportunity to observe job candidate
- Managers have “hands on” involvement
- Direct exchange of information
  - Opportunity to build on paper application
  - Opportunity to assess candidate “in depth”

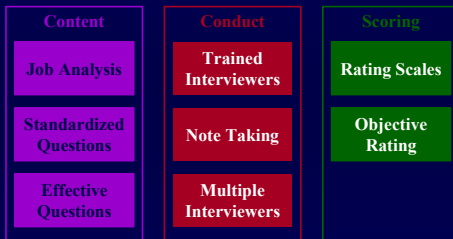
## The Key to Effective Interviewing

- Structure
- Structure includes –
  - Content – the substance of the interview
  - Conduct – how the interview is done
  - Scoring – how information from the interview is rated and used

## Why Use Structure?

- Structure closely links the interview to job requirements by –
  - Giving the interview focus
  - Making interviews more consistent
  - Guarding against errors in judgment
- The outcome: interviews that are better able to predict on-the-job performance

## Elements of Structure



## MSPB Recommendations

- |                  |  |
|------------------|--|
| 1. Job Analysis  | 1. <b>Develop a comprehensive staffing strategy</b>  |
| Assessment Plan  |  |
| 2. Job Posting   | <ul style="list-style-type: none"> <li>• Have a recruiting strategy</li> <li>• Improve vacancy announcements</li> <li>• Use other recruiting methods</li> <li>• Know your job market/candidate pool</li> </ul> |
| 3. Application   |  |
| 4. Screening     | <ul style="list-style-type: none"> <li>• Have an assessment strategy</li> <li>• Analyze your job; identify job requirements</li> </ul>   |
| 5. Ranking       |  |
| 6. Referral      | <ul style="list-style-type: none"> <li>• Have an assessment plan</li> </ul>  |
| 7. Documentation |  |
| Selection        |  |

## MSPB Recommendations

- |                  |   |
|------------------|---|
| 1. Job Analysis  | 2. <b>Use automation as part of a broader staffing strategy</b>   |
| Assessment Plan  |   |
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| Selection        |   |

## MSPB Recommendations

3. Utilize Structured Interviews
4. Utilize Reference Checks

## Reference Checking

- 58% of companies do both a records and reference check
- 10% of applicants say some untruth about education

## Reference Checking

- Lack of cooperation among managers
- Fear of complaints or lawsuit
  - Not if job related
  - Not if on performance (including appraisal information)
  - Preferably within 7 years
- Structure questions back to competencies (job analysis)

For More Information

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(202) 653-6772, x1332

<http://www.mspb.gov/STUDIES>

## References

- Federal Recruitment in the War for Talent: Trends, Innovations, and Recommendations (To be released)
- Help Wanted: A Review of Federal Vacancy Announcements (April 2003)
- The Federal Selection Interview: Unrealized Potential (February 2003)
- The Federal Merit Promotion Program: Process vs. Outcome (February 2002)
- Identifying Talent Through Technology: Automated Hiring Systems in Federal Agencies (To be released)
- Reference Checking: The Final Assessment (To be released)



#### ❖ 4. HR

- ◆ Strategic value has not been proven
- ◆ Trapped within rules, caged within tools
- ◆ Emphasis on form not substance, procedure not outcome
- ◆ Problem solvers not strategic thinkers & systematic tacticians

#### ◆ Belief that development is an evolutionary process therefore:

- Tendency to feel that professionalism is equated with copying developed countries
- Tendency to gloss over culture and context
- Leading to blind adoption of HR trends that are divorced from country-specific realities e.g., IT, PMS, QS, etc.

### GOVERNING PRINCIPLES OF WHAT CAN BE DONE

- ❖ From a disabling to an enabling profession
- ❖ From problem-solving to comprehensive analysis & systemic attacks
- ❖ From regulatory to assistorial
- ❖ From adjunct/follower/implementor to identity/relative autonomy/source of expertise & institutional memory
- ❖ Reclaiming the mission, rediscovering commitment and accountability

#### ❖ Paradigm shifts

- ◆ From hierarchy to collective responsibility
- ◆ From tasks & turf to outcomes & networking
- ◆ From disciplinary to mediation & conciliation
- ◆ From competency-based to integrity, motivation and capacity for longer-term growth
- ❖ From doing HR to marketing HR

#### ❖ Gaining a strategic foothold

- ◆ Anti-corruption initiatives
  - Inter-agency anti-corruption council
  - WAG (Women Against Graft)
  - Lifestyle checks on senior executives
- ◆ Enlisting public support
  - TEXT CSC
- ◆ Improving frontline services
  - Public Service Delivery Audit

#### ❖ Strategic target groups

- ◆ Out of 1.4 million civil service, focus is on
  - Executive service – role models, training, multiple non-threatening hurdles, ability-based categories, creating parallel senior levels e.g., managerial, highly technical, scientific, foreign service, etc
  - HRMO – decentralizing HR functions, training, incentives to agencies depending upon quality of HRMO & prescribed systems in place
  - PSU – partners in effective governance, anti-corruption & frontline service

✦ Major interventions

- ◆ Data base
- ◆ Compensation & performance
- ◆ Recruitment : integrity, Motivation, capacity, understanding, knowledge, experience
- ◆ Rationalizing government structure without sacrificing people
- ◆ CSC as champion

Janos BERTÖK – OECD (Paris) Presentation: *Ethics and Values*

**Ethics and Values**

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**29th International Symposium  
on Public Personnel  
Management**

Florence, 13 May 2004

Janos BERTÖK  
OECD - Paris

**Reform in Context**

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Taking account the political, legal and administrative institutions and culture

- **OECD countries: doing the things right**
  - New Public Management has introduced private sector methods to increase efficiency and effectiveness
  - Exploring the use of new ICTs
- **Countries in transition: doing the right things**
  - Dismantling old mechanisms and creating new frameworks: legal, institutional
  - Putting them into practice

**Governance implications**

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- Building partnership with NGO & business sector
  - Information, consultation, participation
- Reliable government institutions and predictable decision-making
  - Promoting transparency and accountability
- Develop an Ethics Infrastructure that promotes new public service culture

**Building Trust**

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**Why is it important?**

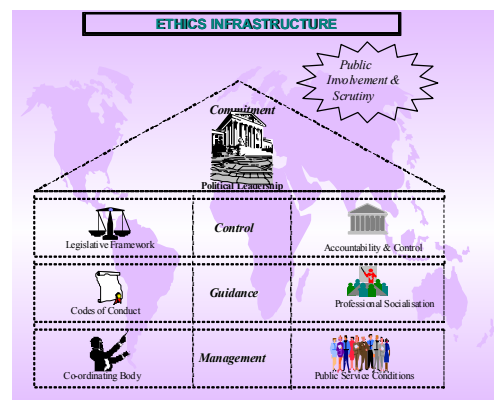
- Declining confidence in public institutions
- “The integrity of politicians and public servants is a critical ingredient in democratic society”
- Ethics has become a key factor in the quality of government to meet rapidly changing environment
- Corruption distorts competition - risk-factor for economy

**Reform in Context**

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Taking account the political, legal and administrative institutions and culture

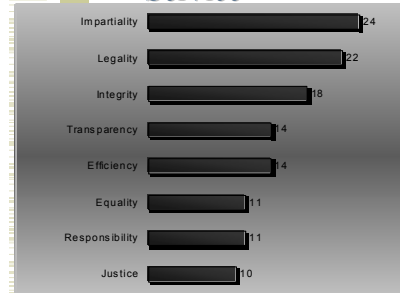
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## Building a New Public Service Culture

- **Modern mission** for public service that meets expectations
- **Redefining values** that underpin the public sector operations in the changing environment
- **What** are the most frequently stated **core values** in countries?

## Core Values in the Public Service



## Defining Values

What are the original sources of values?

- Society
- Democracy
- Profession

Formal sources

- Legal documents – constitutions, civil service laws,
- codes of conduct

Types of values

- Traditional and new public management values
- Basic and derivative values

## Public Service Core Values

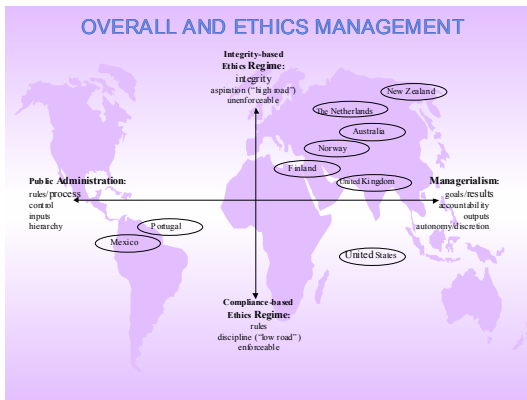
- impartiality
- legality
- integrity
- transparency
- efficiency
- equality
- responsibility
- justice

## Core Values – a benchmark

- Innovation
- Respect
- Client's values
- Integrity / honesty
- Responsibility
- Team spirit
- Company spirit
- Environment
- Quality
- Creativity

## Core Values in the private sector

- Innovation 40%
- Respect 28%
- Client's values 22%
- Integrity / honesty 20%
- Responsibility 19%
- Team spirit 18%
- Company spirit 18%
- Environment 15%
- Quality 14%
- Creativity 12%



## Conflict of Interest Guidelines

- Guidelines – help government institutions develop an effective conflict of interest policy
- Create a practical framework of reference
- Developing the policy framework: measures to properly identify and resolve or manage Col
- Implementing the policy framework: support integrity in partnership between the public and the business & non-profit

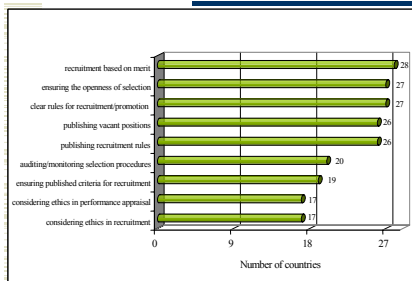
## Applying standards by Setting Standards & Ensuring Compliance

- Criminal laws penalize specific forms of corruption
- Laws also set basic standards, e.g.
  - Using official information and resources
  - Receiving gifts & benefits
  - Working outside the public service
- Putting standards into effect
  - Socialisation: training, advice, guidance, public service conditions, leadership
  - Control & audit, investigation, discipline, sanctions
  - Co-ordination

## Putting values and standards into effect

- ... starts with communication
- **Training** to raise awareness and develop skills for handling ethical dilemmas (conflicting values)
  - **Advice** in concrete situations
    - mainly from superiors, managers -- but also from external sources
  - **Involving staff**
    - success factor for implementation
  - **Use of new technology**

## How OECD countries use HRM to create a supportive environment



## Conflict of Interest

- **WHY** is it a major challenge for both public and private sectors? conflict with the core value
- Role for OECD:
  - Reviewed the experience of OECD countries – survey, case studies
  - Developed Guidelines and Toolkit
- Suggests preventive approach: not adequately identified Col can lead to corruption

## A CoI situation & Corruption

➤ *Compare* -- placing the King 'in check' in Chess:

- being 'in check' must be resolved, but
- it is not *of itself* fatal unless the conflict cannot be resolved

➤ Conflicts of interest are not necessarily Corruption, but are damaging/dangerous; it **MUST** be managed.

## Definition assumptions

➤ A reasonable person, knowing the relevant facts, would conclude that the official's specific private-capacity interest was such that it could improperly influence the official's conduct or decision-making.

➤ The key terms - "*private interests*" "*public official*" and "*official duty*" have been defined specifically, to remove the possibility of doubt in application, and what

## Creating conditions for success

➤ Developing ownership of reform-measure

Reform is not only technical or administrative in nature -it is also a social process that needs

- Consultation with stakeholders
- Communication through media
- Involvement of civil servants to motivate

➤ Empowering both public servants and citizens to report misconduct: whistle-blowing in a cultural context

➤ Integrating integrity measures into overall management

➤ Shifting emphasis from enforcement to prevention

## Tool No. 1: defining CoI situations an objective test

**1. Is Joe / Joanna a public official of a relevant kind ?**

**2. Does he / she have private interests of a relevant kind ?**

If the answer to both is 'Yes', then Joe / Joanna has a [real/ actual] conflict of interest.

## Tool No. 8. Gifts checklist

➤ **Genuine** Is this gift genuine in appreciation for something I have done in my role as a public official, and not sought or encouraged by me?

➤ **Independent** If I accepted this gift, would a reasonable person have any doubt that I would be independent in doing my job in the future, when the person responsible for this gift is involved or affected?

➤ **Free** If I accepted this gift, would I feel free of any obligation to do something in return for the person responsible for the gift, or for his/her family or

## Lessons

Reform is rather a permanent effort

- Phases from creating new frameworks to modernising them
- Periodical assessment and fine-tuning

Put emphasis on both preparation and implementation

- Visible success of passing laws
- Changing the culture needs further efforts and more time

## Working methods

- Collection & analyses of experiences
- Selecting good practices
- Guidelines & comparative overview
  - for policy-making
- Toolkits, manuals -- how to put the policy into practice
- Network of experts
- Policy dialogue with non-members -
  - Regional Anti-Corruption Networks

**OECD work  
on ethics in the public  
service**

<http://www.oecd.org/gov/ethi>

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# Recruitment and Selection Techniques

IPMA-HR International Symposium  
Discussion Paper

## **Recruitment and Selection Techniques**

Creating and maintaining a quality workforce is one of the most important and challenging tasks facing human resources today. Recruitment and selection is the first step in the daunting process of attracting and hiring talented people in today's competitive labor market. Maintaining a workforce of qualified and talented people is key to an organization's success. If the recruitment and selection process is not carried out effectively, all other human resource strategies aimed at building organizational success will be likely to fail.

Some developing countries have high unemployment and an abundance of applications, particularly for unskilled positions. In addition, business growth, and high turnover makes it all the more important for organizations and HR professionals to be able to effectively attract, select, and retain quality candidates.

Innovation and change in recruitment and selection practice are now becoming widespread, particularly in the public sector as more public sector employers attempt to address recruitment difficulties. In order to reap success and become "employers of choice," more public sector organizations are taking a closer look at their practices and making the necessary changes to ensure they remain competitive in today's labor markets.

For example, recently the legislation by which the United States' Congress established the Department of Homeland Security also included provisions that give all Federal agencies more flexibility with respect to hiring. The new flexibilities will allow government agencies to implement recruiting practices more akin to those used in the private sector.

One of the most important provisions related to hiring essentially eliminates the "Rule of Three," which for years had limited managers to selecting from the top three candidates identified by their Human Resources office. Under the new rules, managers will be able to interview all of the candidates that meet the standard of "best-qualified" for a given position. This should greatly increase the chances that managers will be able to identify a candidate who is a good fit for the needs of their office.

### **Recruitment Techniques**

Innovative strategies need to be implemented to enhance recruitment and retention efforts. For example, some organizations have successfully used recruitment and retention bonuses as ways to encourage talented applicants to join the organization and to keep high performing individuals from seeking other employment. Many organizations are combating the struggle to obtain highly qualified employees by offering sign-on bonuses. These bonuses are usually restricted to highly skilled professional and technical positions, particularly those for which there are shortages of skilled personnel. Where recruitment bonuses are paid, some organizations require the signing of service agreements to ensure that the employees remain with the organization for a specified period of time.

Timely hiring is a key issue for human resource managers. In those countries where the supply of available workers continues to decline, the battle for talent will become even more intense requiring approaches so that well-qualified people can be rapidly hired. Employers are increasingly applying electronic technology to find and place employees. Recruitment departments have begun realizing that attention should not be solely concentrated on developing the most precise selection system possible. Today's challenge is developing a valid approach that is also *timely*. As part of the benchmarking work undertaken by IPMA-HR in 2001, best practice organizations were selected in the area of timely hiring. These organizations use a variety of methods to increase hiring speed. These approaches include:

- Decentralized hiring – Instead of the central human resource office performing hiring tasks, operating agencies do this work. In some instances applicant tracking systems are maintained by the central human resource agency, but departments generate their own lists and screen candidates.
- On-line continuous application – To improve timely hiring and provide user-friendly hiring systems, organizations are using on-line application systems for most or all vacancies that enables organizations to hire quickly. The systems also allow applicants to apply 24 hours a day, 7 days a week. Due to the costs and low utilization rates, this may not be a viable option in all countries.
- Shorter application periods/immediate hiring – Some organizations are shortening application periods or immediately interviewing candidates and making job offers. Where this occurs, some organizations have increased the probationary period.
- Aggressive recruiting – Organizations are recruiting aggressively to attract enough qualified candidates so that good hiring decisions can be made. Organizations are using the Internet to recruit and are communicating directly with organizations that are good sources of potential applicants. The use of the Internet and electronic technologies is becoming a prevalent practice. While job fairs, high schools, and colleges continue to be common stopping grounds for recruiters, the IPMA-HR Benchmarking survey suggested a growing emphasis on soliciting job applicants through the Internet. More organizations indicated they are utilizing web sites and e-mail to accept applications. According to the 2001 IPMA-HR survey, almost 60% of the respondents accept job applications electronically.

The latest 2003 recruitment survey from people management experts, The Chartered Institute of Personnel and Development (CIPD) in Great Britain, also identified speeding up the recruitment process as one of the main means of addressing recruitment difficulties across all sectors, along with offering additional ways to apply for posts, being more flexible in the use of recruitment methods, and offering flexible hours of work to attract applicants. Three quarters of the 747 organizations surveyed in the United Kingdom are experiencing recruitment problems – this compares to just over half in 2000. This figure rises to a staggering 89 per cent in the public sector.

According to the CIPD survey report, a broad range of jobs are affected and the main reasons are a lack of suitably skilled and high calibre people and employer inability to offer people what they want both in terms of pay and reputation.

However, organizations are getting more sophisticated in an increasingly competitive jobs market. While over sixty per cent have upped the salaries on offers, the respondents are also recognizing that simply offering more money to get the right people on board and to keep them is not enough. In the public sector, 79 per cent of the organizations in the survey had changed their recruitment practices in an effort to boost success. This included reviewing the process and adopting a more professional approach - even if it cost more. There is also an increasing use of competency based testing and assessment centers. The CIPD survey also revealed that fifty per cent of those surveyed are struggling to retain staff, particularly young people. Measures to keep people include the development of a more attractive “employer brand” and offering more flexible working arrangements. As well as tapping into new sources of labor, organizations are being much more flexible so as to appeal to staff with a diversity of needs and motivations.

Other recruitment practices introduced/improved by organizations cited in CIPD’s survey report:

- Working on a positive applicant experience.
- Training of interviewers/observers .
- Offering candidates extra ways of applying (e.g. by email) .
- Offering more opportunities to temporary staff with a view to longer-term employment.
- Recruiting in other countries .
- Being more flexible in the methods used to attract applications .
- Being more flexible in offering dates, times and/or locations of interviews .
- Being more flexible in the criteria used to select applicants to appoint .
- Devolving recruitment to line managers.
- Taking account of demographic trends (e.g. shortage of young people) and targeting appropriately.
- Addressing imbalances in the diversity of the workforce

### **Building a Recruitment Strategy**

The first step in building an exceptional workforce is finding and selecting talented, motivated people. Recruitment and selection establishes the foundation for staffing government organizations and is a key part of any human resource program. The recruitment and selection process must reflect good business practices directed at achieving high quality service at the lowest cost. A well thought-out and implemented recruiting strategy will help to ensure that the right employees are in place when needed.

Acquiring and retaining quality talent is the key to any organization's success. Human Resources' role is to facilitate the hiring of qualified and motivated people. A well thought-out and implemented recruiting strategy will help to ensure that the right employees are in place when needed. Here are some tips on establishing a strategy:

### **Create a Strong Partnership Between HR and Line Management**

Work aggressively with line management to understand their staffing needs and to get them to buy into the recruiting strategy. Their participation and support will affect whether your efforts are on target or not.

### **Diagram or Flow-Chart the Recruiting Process**

The way to a world-class recruiting process, no matter what the size or budget of your organization begins with knowing how you currently do things. Chart each step from initial recruiting activity to new employee hire. Look for gaps or bottlenecks in the process. Watch out for unnecessary or duplicate steps. Ask your customers (recruiting staff, other internal staff, and external contacts) for their feedback. Use the feedback to streamline or supplement your process.

### **Build a Comprehensive Plan**

Here are some of the elements of a recruiting plan:

- Needs Assessment - Layout the numbers (monthly, quarterly, annually) of anticipated hires for each service line, job category or division;
- Job Requisition System – Have a process that identifies and prioritizes job openings;
- Qualifications profile – Draw profiles from job descriptions that identify responsibilities and required key skills, abilities, knowledge and experience;
- Internal job posting – Make it easy for current employees to compete for promotions and transfers;
- External job posting – Develop the image you want to convey to the marketplace about the positive aspects of your organization and its jobs;
- Recruiting Staff – Decide recruiter selection, training and evaluation;
- External Market Sourcing – Select the appropriate sources to be used such as ads, job fairs, Internet, etc.;
- Creative Sourcing - Consider alternatives such as temp-to-hire, part-time, out-sourcing, offshore, school-to-work, job sharing, telecommuting and training programs.
- Budget – Estimate your needs in terms of funding, dollars and resources;
- Applicant tracking – Set up a system to track candidates which can be used to monitor progress and for reporting requirements;
- Applicant screening – Work out how you will qualify good candidates and get them into your processes quickly;
- Testing – Determine if testing (skills, psychological or drug) will be required.
- Interviewing and selection – Ensure that the selection and decision-making activities are valid, streamlined and documented;
- Credentials – Ensure that references and credentials are verified; and

- Offers and Acceptances – Orchestrate offers in a positive way that helps to close the deal.

### **Measure Everything**

Organizations that use methods to track and monitor success rates of different recruitment methods are in the best position to achieve ongoing effectiveness and efficiency. Possible metrics would include yield ratios (e.g., ratios of leads to invites, invites to interviews, interviews to offers, and offers to hires); time to hire; and, cost to hire. Also, find ways to measure the quality of hires over the longer term, such as retention, promotions or performance.

### **Use Technology**

Technology is significantly impacting recruitment today. Resume databases are becoming more affordable. Databases can track, store and retrieve resumes in electronic format. The introduction of Web based resume management systems and email have made multi-location recruiting a lot more efficient. From an employer's standpoint this means that the market for employees can be expanded and, potentially, the quality of applicants can be enhanced. All much more cost effectively than running ads in local newspapers or trade journals.

The best way to become familiar with the recruiting resources available on the Internet is to review the various services yourself, keeping in mind that you want to find one that is most advantageous for you. This may not necessarily mean one of the major commercial sites like the Monster Board. Smaller, more specialized services may be more appropriate for your needs depending on the type of position you are attempting to fill.

When recruiting online you need to have the same familiarity with these services as you would with any technical or professional journal you were advertising in. Who are the users of the site? What are their characteristics? How frequently is the site accessed? How widely do they advertise? Is the profession you are recruiting for well represented?

The use of keywords--the search words that online job seekers will enter to pull up your listing--is a critical and often overlooked skill. You need to tie the appropriate keywords to your ads. And you need to probe to make sure that your ads are being coded properly. If you have posted ads and wonder why you are not receiving any inquiries, the coding process may be the culprit. Each search engine is different and you need to take the time to learn how each one functions and what sort of patterns there are in putting the keywords together. You do not want to code too restrictively or too broadly. Knowledge of how terminology is used in the field you are recruiting from is a must.

### **Retention As a Recruiting Strategy**

Retaining key talent is a critical organizational competency. An accepted way to estimate the organizational costs of turnover, according to Hewitt Associates, a global human resources

outsourcing and consulting firm, is to multiply 1.5 times the salaries of the people who left during the year. High turnover can have a negative impact on quality, goals/objectives, corporate knowledge or intelligence, customer service, productivity, morale and recruiting. Organizations can reduce turnover by implementing programs that support communication and feedback, concern for the individual, compensation, training opportunities, rewards and recognition, new technologies and a positive work environment.

### **Keep Up With the Changing Legal Landscapes**

Monitor changes in legislation and or regulations to ensure that your recruiting strategy and plan is in compliance. Record keeping, documentation, application forms and equal employment opportunity reporting are just a few things to consider. Use your attorney or professional conferences, seminars and publications to keep current.

### **Recruitment Sources**

Here is an overview of some of the sources available, which you could use in the implementation of your plan.

#### **Print Advertising**

Running ads in newspapers and periodicals will continue to be an important way to reach candidates. Decide which types of ads and which media give you the desired results. Many newspapers are also running their print ads on the Internet. You can use print ads to direct candidates to your Web site.

#### **Recruiting Firms**

Traditional recruiting firms fall into two categories: contingency or retainer. Contingency firms typically shop their candidates to a number of organizations, charging a fee when the candidate starts. Retainer firms charge a fixed fee usually paid up-front. Retainer firms are typically used for senior management level and more esoteric technical jobs where direct sourcing is needed to identify and recruit the candidates.

Both types of firms charge between 20% and 30% of first year's annual salary. Negotiate to get the best price, remembering that volume and relationship should drive the price down.

Recruiting firms are often a good choice for specific functions such as technology, where you have limited expertise, time or contacts. They often provide needed candidate pools, especially if your internal recruiting time or resources are limited.

#### **Employee Referrals**

The friends and associates of your employees are often an excellent source of applicants. A formal employee referral program doesn't have to be fancy or expensive. Incentives to the

referring employee can include gift certificates, company merchandise, cash awards, trips or cars. As important to the incentive is the manner and frequency in which the program is communicated throughout the organization. Timely action on the applicants referred is really important to maintain credibility and good will. Make sure you have a nepotism policy in place, so there are no misunderstandings.

### **The Internet**

Using the Internet is faster and cheaper than many traditional methods. Jobs can be posted on Internet sites for a modest amount. They also remain there for periods of 30, 60 or more days and are available 24-hours a day. Candidates can view detailed information about the job and the organization, and then respond electronically. Since the scope is worldwide, you receive many resumes.

### **Independent Contractors or Temporary Workers**

Temporary workers and independent contractors can be good sources of applicants. Typical “temp to hire” programs have the individual work as an employee of the temporary firm for 3-6 months, and then if all goes well, they become an employee of the organization. The same scenario can be used for the independent contractors, but in setting up the relationship, you should consider regulations that define an “independent contractor” to avoid tax and benefit plan complications. Ensure that provisions to cover temp-to-hire situations are included in the contract you have with the individual or agency.

### **College Recruitment**

To get the best college graduates, make your organization and career opportunities stand out. Define a target list of schools and assign a key person to manage the relationship with each. Look at the relationship beyond the traditional “career day” timeframe and establish more long-term communication. Capitalize on the relationships of your employees who are alumni of the school. Show students “real life” examples of work opportunities in their degree field. Show how the work you offer meets their needs for skills enhancement, rewarding opportunities, personal satisfaction, flexibility and compensation.

### **Job Fairs/Career Days**

The typical job fair is still popular today, whether commercial, school or community based. Local or community group job fairs are great ways to reach out for local applicants, minority groups or special program participants such as welfare-to-work. Job fairs are often open, so it is difficult to predict the types, number and quality of applicants you will see. Industry or skill specific career days or job fairs can be beneficial for critical skills or certain locations.

## **Co-ops and Interns**

Co-op and Intern programs can give you quality employees at low cost per hire. Some student intern requirements are non-paid, or small cost, such as paid meals and parking, or minimum wage. Look to local colleges or universities with degree programs you are interested in. Large, full-scale co-op and intern programs offer career minded work experience and often success on the internship leads to a full time offer upon graduation. Don't overlook the non-traditional student at a local school. These individuals often have other types of professional work experience and need part-time employment while in school. Their school schedules may require some scheduling flexibility, but the productivity and loyalty may indeed be worth it.

## **Selection Techniques**

Different types of positions require different kinds of selection techniques. Choosing the right techniques will help you to recruit the best person for the position. The selection techniques you choose depend on the particular skills, attributes and knowledge required for the position. You must be able to match the selection method with the selection criteria that are most critical to the position.

It is not a good idea to make recruitment decisions based on the results of one selection method alone. Very often you need to combine two or more techniques to assess a range of skills and qualities in candidates. For example, work samples are an excellent way to assess what a candidate is capable of (i.e. their maximum performance), but they do not provide information on what the candidate does daily (i.e. their typical performance). Reference checks must be used as well to obtain this information.

### ***What to consider when choosing***

- the seniority/level of position
- the degree to which managerial/leadership ability is critical to success
- the degree to which technical competence is critical to success
- the time and effort required to use the technique, in proportion to the risk of poor selection
- available resources
- the budget
- the skills, knowledge and qualifications of assessors
- equity issues, i.e. does the chosen technique directly or indirectly discriminate against equal opportunity employment groups?

Both the IPMA-HR and CIPD surveys reveal certain trends in selection techniques. The top selection methods indicated by respondents in the IPMA-HR survey were:

- Written tests for job knowledge
- Training/experience evaluations
- Oral Exams
- Resume screens
- Criminal record checks for certain jobs
- Pre-employment drug testing and
- Assessment Centers

CIPD's 2003 survey reveal that some form of face-to-face interview is clearly the preferred selection method for 97.3% of organizations and for all the public services respondents. Comparing methods used in the 2002 and 2003 surveys, organizations want to predict future job performance more effectively by increasing the use of Competency-based interviews, Assessment centers and Work sampling.

### **Competency-Based Interviews**

Competency based (or behavioral) interviews are based on the premise that past behavior is the best predictor of future behavior. Interviewers seek to obtain information about the past behavior of candidates in certain situations. Competency-based interviews are structured, with questions that relate directly to the essential criteria/ competencies required for the post.

Research into recruitment and selection methodology suggests that structured, competency based interviews can be one of the most reliable and accurate forms of assessment. A good recruitment and selection interview should assess candidates against each essential criteria or competency, asking questions about:

- Past behaviors and performance
- Learning from past behaviors
- Future adaptability to the new post
- Knowledge and understanding of issues in relation to the post

### **Assessment Centers**

The assessment center is traditionally used for large scale or bulk recruitment exercises. Assessment centers vary in complexity and are typically conducted by trained consultants. They can be expensive and complex to administer and are usually more cost effective when recruiting large numbers of people. A typical assessment may run over the course of one or

two days and involve trained assessors evaluating a number of candidates using a range of techniques such as interviews, written tests and individual and group exercises. Assessors assimilate evidence from candidate performance across all exercises and incorporate this into a final collective decision.

### ***Work samples***

Work samples involve an individual or group of candidates completing exercises that they would be required to undertake as part of the position. For group tasks, candidates are placed in a situation in which the successful completion of a task requires interaction among the participants. In individual exercises, participants complete a task independently.

### ***Recruiting Needs and Challenges***

Retirements and an aging workforce have some organizations in some countries scrambling to find and attract new employees, as most employers have become more aware of the forecasted demographic shifts that will result in a shortage of skilled workers. For example, there will be a dramatic decrease in the proportion of older, skilled workers, which is expected to significantly impact the workforce around 2010, when Baby Boomers will begin to retire in large numbers. In addition, the number of retirees will double in the time period between 1995 and 2025.

How will organizations overcome the onslaught of aging workers, increasing retirements, higher demands on services, and the changing needs and motivations of older workers? They may need to strengthen incentives for older workers to work longer. For example, they may consider rehiring retirees and offering reduced work schedules or job sharing.

Although each organization has its own approach to recruitment, there are some common recruiting and selection concerns that all organizations should take into consideration:

- Can the current structure deliver the most value to the overall organization?
- Are there metrics that consistently track recruitment and selection throughout the organization?
- Do the metrics in use illustrate how recruitment and selection techniques adds value to the organization?
- Are you developing strong recruiting relationships with hiring managers?
- What can be improved by changing the recruiting structure—costs, knowledge, cycle time, quality of hires?
- How is the employer brand being affected?

## ***Conclusion***

It is recognized that removing overly restrictive rules and processes will not necessarily solve various problems with some existing civil service recruitment and selection systems. It is important to keep in the forefront the principles that provide crucial protection for employees from arbitrary and discriminatory treatment, and protections to the public to minimize patronage, promote fairness, and create a professional and stable workforce.

Like any other human resource practice, recruitment and selection should be linked to successful accomplishment of the organizational mission. Recruitment and selection should be a flexible and streamlined process that meets today's needs. It also should be a fair and open process that promotes fairness to employees, applicants, and the concept of merit.

To effectively meet today's recruitment and selection challenges, organizations need to reshape recruitment and selection strategies from a "one size fits all" regimented process to one that is position-specific and offers speed and flexibility while maintaining the principle of merit. Enabling good human resource practice and holding hiring authorities accountable for the application of good practice rather than control through inflexible rules can best accomplish this goal.

Finally, better recruitment and selection strategies result in improved organizational outcomes. Ultimately, effective screening comes down to meshing new technology with old-fashioned HR smarts. It is about using software to improve applicant tracking and spot potential candidates, and then relying on solid interviewing techniques to choose the right people. A solid applicant-tracking system can be a powerful tool. However, it cannot replace human decision-making. Organizations that use both effectively are likely to gain a competitive advantage and achieve greater success. The more effectively organizations recruit and select candidates, the more likely they are to hire and retain satisfied employees.

Some questions Symposium participants may wish to discuss include:

- 1) What are your recruitment and selection challenges?
- 2) What successful recruitment and selection techniques have been utilized by your organization?
- 3) If your organization is using the Internet and other technology (for e.g. job postings, online applications, etc.) for recruiting purposes, has this approach been as successful or more successful than other traditional approaches?
- 4) Is your recruitment/selection process centralized, decentralized or a combination of both?

- 5) Are you experiencing a labor shortage/surplus? If so, does it vary based on certain occupational groups and what measures have you adopted to address the situation?

# Human Resource Service Delivery

IPMA-HR International Symposium  
Discussion Paper

## Human Resource Service Delivery

### Introduction

Today, organizations find themselves under great pressure to change due to global competition and rapidly advancing technology. HR functions are being asked to contribute to strategy, to champion change and to make sure that they are delivering their operational processes as efficiently and effectively as possible.

Many HR departments are trying to shift from an administrative to a strategic emphasis. In order to be taken seriously as strategic, business partners, HR functions must demonstrate that they have well managed HR operations.

The approaches being used to streamline HR delivery processes involve re-engineering and the more intensive use of technology, for example through the creation of 'service centers' for transaction processing. The approaches being used to improve service levels and costs include the use of service level agreements and internal charging, the outsourcing of some non-core processes, as well as the decentralization or centralization of certain HR functions.

### HR and Technology

Over the past several years, organizations have been investing in HR systems and Web-based technologies to support growth and help transform HR into a more strategic role in the organization. Research studies by R consulting firms, Towers Perrin and Watson Wyatt reveal that organizations continue to Web-enable their delivery of human resource services at a rapid rate. Over the last 5 years the introduction of Intranet and Internet-based technologies has led a new wave HR technology – e-HR.

There are two elements behind the “e” in e-HR: one is the use of electronic media while the other is the active participation of employees in the process. e-HR combines these two concepts to provide technology that helps to lower administrative costs, improve employee communication, provide quicker access to information and reduce processing time. With HR portals, organizations are able to connect employees electronically with all other people responsible for the provision of HR services (i.e. the HR Department, departmental managers and outsourcing providers/Shared Services).

This technology holds out the promise of changing the role of HR – transforming the HR Department by reducing administrative workload and allowing organizations to devote more time and energy to strategic business issues. However, this change is not without pain – HR practitioners need to re-skill and add more value beyond administrative services. Managers also need to adapt to the increased responsibilities they have for HR issues when e-HR is introduced.

Up until the early 1990's, Human Resource departments, or Personnel and Administration departments, were largely seen as "gatekeepers" whose primary role was to enforce policy and perform the essential administrative tasks that arise when managing a workforce. With these objectives in mind, it is not surprising that human resource information systems were highly centralized with access typically restricted to the HR department.

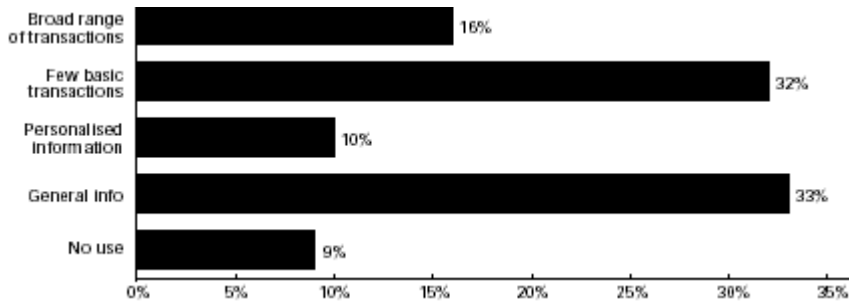
The advent of client server technology coincided with a change in emphasis on the goals of the Human Resource department. HR departments started to become more focused on adding strategic value within an organization and being a business partner. Under this scenario, it was possible to grant more people, typically business unit managers, access to Human Resource information using the new client server technologies.

The advent of web-based technologies has allowed HR departments to extend services directly to employees and also to remove administrative work. One further advantage of web-based technologies is that the cost of both hardware and software is much lower than that of previous technologies. e-HR has, therefore, become economically viable for a much wider range of organizations. In parallel with the emergence of new technologies, we also see increasing expectations from employees – they demand the same 24/7 access to their own information from their employers as they would do from any other service provider.

A recent survey by Watson Wyatt (B2E / e-HR European Survey Results 2002) shows that the majority of organizations have introduced static e-HR capabilities so far but that the use of interactive e-HR is increasing rapidly. The survey finds that 80% of its survey respondents are looking to introduce or add to existing interactive capabilities. The survey also finds that 75% of organizations are looking to make changes to their e-HR capabilities over the next 2 years.

More detailed research by consulting firm Towers Perrin indicates that most organizations that have introduced e-HR have so far limited themselves to a few basic transactions or are just providing general information. The research indicates that those organizations that have introduced transactions and made their sites interactive are reporting successes as compared to those that have limited themselves to static information.

## Graph 1: How organizations are using e-HR



Source: Towers Perrin e-Track: web-based self-service: The current state of the art

## Technologies Deployed

Most organizations have implemented some form of employee self-service, particularly in the benefits arena. In keeping with results from research studies, most of the benefits to date seem to be tactical and transactional in nature — specifically, more rapid processing of transactions and improved data accuracy.

Watson Wyatt in its recent annual e-HR survey found that there has been a significant trend towards the Internet/Intranet as the preferred platform for deployment of HR services:

- More than 70% of respondents use the Intranet or Internet to deliver HR services to employees.
- Interactive Voice Response (IVR) that took the top spot in 1998 as the delivery system of choice is now in third place.

Increasingly, organizations are designing the delivery of HR services around HR portals with call centers, IVR and Human Resource Information System (HRIS) being deployed in line with a web-enabled HR strategy. The HR portal has rapidly overtaken the Corporate Intranet as the medium for service delivery. Some of the reasons behind the observed trends towards HR portals are:

1. Larger organizations can build HR portals on top of expensive enterprise resource planning (ERP) software systems --systems that attempt to integrate all departments and functions across a company onto a single computer system that can serve all those different departments' particular needs.) – no need to reinvest in back-end systems.
2. Smaller organizations can access web-based technology at a lower total cost than other

solutions available and can avoid the costs of maintaining software in-house.

3. Portals provide immediate access to information on a 24/7 basis.
4. Portals are designed to include the security infrastructure and workflow capabilities that are required for transaction-based employee self-service. On the other hand, the organization's Intranet is usually only able to handle static web pages.
5. Wider range of portal solutions are now commercially available:
  - Web-based extension to existing HRMS;
  - Specialist corporate portal software solution;
  - Solutions purchased along with HR outsourcing services from a third party.
6. Increasing acceptance of the power of the web to reduce processing and transaction costs.

However, many organizations have come to view any technology solution, at any price, as the right solution and unfortunately, many lack a sound return on investment analysis as part of their decision-making. Current economic conditions faced worldwide are forcing organizations to refocus attention on the need to make a cost-conscious and financially sound business case for their eHR initiatives.

There are six key issues organizations need to consider to develop a business case for technology:

1. Understand and leverage the link between technology and the business strategy. HR services and systems must be viewed in the context of helping achieve business objectives.
2. Quantify the current cost of delivering HR services. You must understand where you are today before you can identify cost-control opportunities and project anticipated cost savings.
3. Define how technology will change the delivery of HR services. Establish a vision and articulate what the vision will mean in terms of people, process, and technology.
4. Work closely with your finance organization to develop required analysis. Include a combination of measures such as net present value, rate of return, and payback period.
5. Establish measures/targets to maintain focus and assess progress. Get results by concentrating on cost reduction, improved transaction accuracy, or improved service delivery, and measure against that focus.
6. Pre-sell your business case to executive team members. Educate key decision makers along the way so they are on board when it is time to ask for funding.

### **Other considerations:**

1. What do you want to accomplish in moving people to the Web in your organization — both in the near and long term?
2. Can the Web help change employees' behavior — for instance, supporting better decision making around health care or retirement planning? What's required to make that happen?
3. What role should the Web play in supporting and easing managers' responsibilities for people management?
4. What's the right balance between the Web's high-tech focus and the interpersonal "high touch" approach that employees still need in many areas?
5. What else needs to be in place to achieve overall organization objectives? For instance, new communication processes? Change management programs?
6. What other delivery vehicles should you aspire to reduce or eliminate, if any?
7. What kind of functionality is required to ensure effectiveness and usability of the Web and all the applications you have or want to introduce?
8. Where do you want to head in the future and what steps are required to get you there — from both a technological and informational standpoint?

Periodic reassessment of your answers to these and related questions can go a long way toward ensuring that the promise and reality of eHR in your organization are in sync.

### **Outsourcing HR Functions**

The outsourcing of HR functions or processes is also now becoming widespread and growing. According to a 2003 study on HR outsourcing trends conducted by the Conference Board ([www.conference-board.org](http://www.conference-board.org)), a nonprofit business research organization, and Accenture HR Services, a global management consulting and technology services firm, respondents from the United States, United Kingdom, and continental Europe indicated their main reasons for outsourcing HR functions include: pressure to reduce costs, improve service to employees, and maximize resource availability.

Transactional or administrative HR functions are the most commonly outsourced aspects of human resources, according to the survey of 125 large organizations. Nearly seven of 10 (69 percent) of the respondents, whose median workforce size is 30,000 employees, outsource at least one major HR function. Two-thirds of the responding U.S. organizations compared with one-third of the organizations based in the United Kingdom and continental Europe, fully or partially outsource five or more HR functions.

The HR functions most likely to be fully or partially outsourced are 401(k) programs (outsourced by 80 percent of the respondents), pension benefits management (70 percent), health benefits management (69 percent), training and development (57 percent), stock and options administration (54 percent), and other benefits management (54 percent). Somewhat less likely candidates for outsourcing are call centers (48 percent), payroll (45 percent), and recruiting (44 percent). Least likely to be outsourced are employee communications (13 percent), human resource information systems (25 percent), and assessment (38 percent).

## **To Outsource or Not to Outsource**

The decision to outsource an HR activity or other business function is specific to each organization's needs and should not be made hastily. Considerable work will be required up-front to engineer the outsourcing initiative and subsequently to supervise and manage it well. HR staff will be critical both to the transfer or conversion process and to monitoring of performance standards, and they will need a contingency plan to deal with any serious problems that arise.

Outsourcing's potential effects on the organization need to be considered and balanced against considerations of cost, efficiency, and quality, as well as HR's strategic goals and long-range objectives.

Conducting a pre-outsourcing audit--to identify strengths and weaknesses by evaluating critical tasks and workflows and determining how service processes might be streamlined or otherwise consolidated, integrated, or changed via outsourcing--is a recommended first step that should lead to more informed decision-making.

Two especially important sets of questions to ask during a pre-outsourcing audit are:

- What are HR's strategic goals and objectives? What does HR contribute to other departments?
- Who performs the various HR functions? Where are the activities conducted? How often? At what cost?

Other questions that should be asked are:

- How might the decision to outsource affect the organization's goals generally and the goals of HR in particular? What effects could outsourcing have on HR department staffing levels and roles?
- Can the proposed activity or function be outsourced without causing employee relations problems?
- How might outsourcing affect communications with active employees and retirees?
- Will the vendor customize programs or services to accommodate the client's culture and to meet specific organizational needs?
- How do the estimated costs of outsourcing compare with the actual costs of in-house administration of an activity?
- What is the existing level of service? Will outsourcing improve that?
- How do the competencies of the vendor's staff compare with the competencies of the employer's HR staff?
- Can several related HR functions be outsourced to the same vendor? Is the vendor

willing to collaborate with in-house employees and other independent contractors to provide services?

- Is the vendor willing to risk its fees to ensure quality service?
- Are databases integrated and centralized? Are back-up or disaster-recovery systems in place? Are the vendor's computer systems compatible with those of your organization?
- What technological support options (for example, fax, interactive voice response) are needed and available?
- What, if any, legal concerns need to be addressed? (For example, will the supplier conduct nondiscrimination testing to ensure that a benefits plan meets legal requirements?) What tax, legislative, or procedural ramifications should be considered?

It is important to keep in mind that outsourcing relationships are not static or constant, and will change, normally and necessarily, as the needs of the organization change. Some organizations will use outsourcing to help them implement or reengineer a process that they may later bring in-house; others will outsource certain functions permanently. In either case, the most benefits are likely to be gained by those organizations that make a *calculated* decision to outsource and that view outsourcing not as a simple means of cost control or staff reduction, but as a tool to enhance and support HR.

Human resources consultants recommend taking the following steps to initiate the outsourcing decision-making process and organize the transition phase:

- ***Assemble a task force.*** Ideally, a decision-making team should include the head of HR; managers from information and technical systems, accounting and auditing, and HR functional areas (benefits, training, etc.); a representative from the organization's legal department; and the chief financial officer. Senior management should also be involved. The major responsibility of the team should be to articulate your organization's reasons to outsource based on a thorough assessment of processes, workflows, skills required, system needs, and compliance issues, and an inventory of costs.
- ***Conduct a needs assessment.*** Activities that are administratively burdensome and require a lot of staff time that could be better spent on core tasks should be identified. Determining what the administrative burden is and how it can be reduced or eliminated through outsourcing will be key to developing a request for outsourcing services. If existing staff, budget, and systems make self-administration cumbersome and inefficient or prevent HR from meeting individual departments' expectations, outsourcing should be considered.
- ***Analyze costs and benefits.*** The objective of cost/benefit analysis should be to assess how well HR is managing the bottom line and to determine whether and in what areas it can increase profitability and effectiveness over both the short- and long-term.

Internal direct costs and savings (for example, staff compensation and benefits, consulting fees, hardware and software, annual maintenance and support) and indirect costs and savings (for example, training and development, learning time, legal and compliance support) connected with outsourcing need to be totaled and the return on investment estimated. Whether outsourcing will be “cost-effective” will depend on the individual employer's vision of where it wants to be once a function is outsourced: One firm may decide that outsourcing will be cost-effective because the vendor can provide the same level of service for less cost, while another will be willing to pay more because the vendor can offer more efficiently a higher quality of service.

- ***Evaluate the advantages to centralizing or decentralizing HR before outsourcing.***  
The structure of an HR department may impede or facilitate the delivery of services. Centralized HR operations tend to be more bureaucratic and to exert greater constraints on staffing; in addition, management of a large administrative staff may divert time from planning and setting goals. Decentralized operations sometimes make it difficult to attain consensus on design issues and to achieve consistent communication among divisions.
- ***Decide how workers who may be displaced by outsourcing will be accommodated.***  
When employees are displaced because a function is transferred to a vendor, productivity may decline among workers in other departments who fear losing their jobs. For those who are displaced, the organization may consider offering other positions, a severance package, early retirement, and tuition assistance and/or outplacement services. There may even be opportunities for displaced workers to become employees of the vendor.
- ***Collaborate with unions if you operate in a unionized environment.*** If you are in a collective bargaining or unionized environment, it is important to remember that trade unions focus on the representation of employees interests. They see all forms of outsourcing as a threat to the employees, especially in terms of job losses. It is important for management to communicate and consult with the unions or other affected groups as early in the process as possible, so has to enhance management’s credibility in negotiating any terms affecting employees in the outsourcing process.

## **Identifying Functions To Outsource**

Ideally, outsourcing should be used as a means to shift HR's focus to its core competencies (for example, ability to lead change within the organization, conceptual thinking, consulting and advising, team-building) to better support organization-wide efforts to increase productivity and profitability. HR functions such as succession planning and management development, strategic planning and policymaking, or change management that are “value adding”-- that aim to improve the organization’s strategic position or that directly affect relationships with customers inside and outside the organization — should remain in-house where they can be closely aligned with organization needs. Activities that are generally administrative and labor-intensive, such as payroll processing, may be

outsourced.

### **Technology Issues in Outsourcing**

Technology (for example, computer-based training, interactive voice response, the Internet, e-mail and voice-mail, “smart cards” that electronically store and transfer information) is increasingly important to HR, providing it with an ever-changing array of tools to gain access to or share expertise, to streamline and improve the efficiency of administrative processes, and to improve service to and communications with employees. Because they will help determine how viable the outsourcing solution will be, technology issues should not be overlooked during the process of deciding whether and what to outsource.

When reviewing options to provide training, process payroll, or deliver benefits or other employee services, it is important to consider carefully the pros and cons of investing directly in technology that will support self-administration of human resources activities. On the one hand, if department functions are not centralized and integrated and staffing is lean, outsourcing may be more practical (less costly) than purchasing hardware and software and identifying and training staff to use and maintain it. On the other hand, if systems and the expertise needed to use them are wanting in a particular vendor, cost will be less of a factor than finding a supplier that is a proper “fit” for the organization’s needs.

To facilitate analysis of technology issues as they pertain to outsourcing, the following questions about in-house and vendor systems should be considered.

- What areas rely most heavily on technology?
- Are payroll and benefits functions integrated?
- Do HR staff have to respond to repetitive inquiries about benefits or other programs and services? Could this administrative burden be reduced or eliminated by using interactive voice response technology?
- Is benefits enrollment currently handled manually? If yes, what is the rate of data-entry error?
- How recently were the organization’s existing hardware and software systems put in place? Are those systems overburdened? Is it likely the systems will become obsolete within the next two years to five years or require significant retooling because of forthcoming changes in government regulations? Is it cost-effective to upgrade outdated technology? Are the resources available to upgrade and then maintain the systems?
- Is existing in-house technology for employee communication, training, education, benefits enrollment, or retirement planning interactive? Do employees find it easy to use the technology?
- Is employee and organization information shared across multiple systems, or is data entry redundant because system interface is lacking?
- Is online or electronic exchange of information between the organization and the prospective vendor possible? Will parallel databases have to be maintained?
- What kind of systems back-up is maintained by the prospective vendor?
- Does the prospective vendor use software that generates “call profiles” (i.e. reports containing information the employer can use to assess the quality and quantity of

vendor service (for example, number of calls received from employees, calls answered promptly and accurately, calls requiring follow-up)?

- If the vendor's automated system cannot address a specific inquiry, are operators available to answer employees' questions?
- If multiple vendors are to be used, how will enhancements in one provider's system affect data requirements in another's?
- How committed is the vendor to updating recordkeeping software?

## **Contingency Plans**

Agreements with third-party administrators or other service suppliers or providers typically are for three years to seven years. While it is in an employer's interest to remain with a provider for as long as possible, given the organization's investment in the vendor, contracts sometimes must be terminated abruptly because of unforeseen events (for example, bankruptcy).

Consequently, the decision to outsource should be balanced with an understanding of potential risks, and a written plan should be in place to deal with those risks.

A contingency plan should address the following questions:

- What back-up system is in place in case of damage or disaster?
- What measures may the employer take if the vendor fails to deliver the contractually agreed-on services?
- What action may the organization take, once the contract is severed, to protect the confidentiality of any proprietary information?
- What can the employer do if the outsourcing decision proves too costly? If the organization must bring the outsourced function back in-house or wants to turn it over to another vendor, how will it accomplish the transfer with minimal disruption?

Consulting with legal counsel when developing a contingency plan is always a good idea, both to prevent costly struggles over proprietary data or contract payments and to ensure that shared resources and technology will be available to the organization on dissolution of the contract.

## **Centralization/Decentralization**

The decision to centralize or decentralize your HR function(s) should be determined based on what would enhance the efficiency, effectiveness, and responsiveness of your services to your internal and external customers. Many organizations use a combination of a centralized and decentralized system, with certain functions being performed by the central HR agency, while other functions are delegated to individual agencies. Whether your systems are centralized or decentralized, the hallmark of a successful system is one which establishes goals, provide quality customer service and holds managers accountable for their actions.

In a centralized HR system, usually the central HR agency is responsible for the coordination of HR policies; development of pay and classification systems; centralized recruitment and testing of candidates; centralized training; centralized administration retirement, pay and benefit systems; providing technical assistance; and evaluating departments to ensure compliance with rules and regulations.

Advantages of having all of the HR functions performed by a centralized HR department include uniformity in dealing with HR activities, enabling the development of a high degree of specialization in the technical aspects of HR, and economies of scale that can result when functions such as testing and recruiting are performed by one department. Some of the disadvantages include rigidity and non-responsiveness to changing needs. Line managers sometimes view the central HR department as a barrier too far removed from what is actually happening at their level.

In a decentralized system, authority and decision-making power are placed as close as possible to the level at which the work is performed. Other agencies and departments are delegated the authority to conduct their own recruiting, hiring, and examining for all positions. Agencies can also carry out their own background investigations of candidates. Performance management and reward systems can also be decentralized to other agencies, if it will improve the performance of employees and the departments. The central HR agency can play an important role in oversight and evaluation under this type of system as well as ensure the training of employees and managers to effectively carry out their roles.

The main advantage of a decentralized system is that it allows line managers to attain the goals and objectives of their departments under less bureaucratic methods of operation. Decentralized systems tend to be more flexible and allow decisions to be made more quickly. Also, managers tend to be entrusted with more responsibility in the decision-making process, increasing morale, and as a result, have a greater commitment to the organization. The primary disadvantage is the risk of lack of consistency and equity in HR policies and practices and the control that exists in a centralized system can be more difficult to maintain.

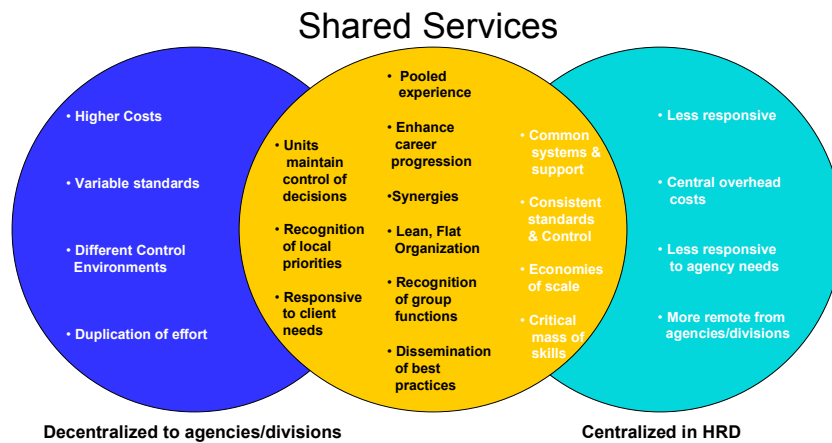
### **Shared Services**

Another area in which HR is attempting to improve and enhance its service delivery is with the concept of Shared Services—whereby two or more business units contract to provide jointly any service or function, which any one of them cannot provide for itself. The economies of scale possible through shared services programs offer the potential to reduce costs and maintain or even improve service levels. Within the general requirements of law, the participants can structure shared services programs to meet the needs and unique features of their customers. For example, the HR department of the Commonwealth of Massachusetts in the United States is reorganizing its operations and its relationships with the other agencies, based on the shared services concept. Their aim is to streamline and provide an efficient way of delivering its human resources services.

The Shared Services model they have created takes the best of a centralized HR group and a totally decentralized structure. The combination results in a central HR department that will be

a single source of information and expertise. It is hoped this will improve the quality and consistency in the handling of employee issues.

The chart below shows the advantages of shared services. The circle on the right indicates the problems associated with a centralized model while the circle on the left lists the decentralized concerns. The value of the shared service model is outlined in the center circle with the benefits of the centralized and decentralized model remaining in tact.



**Source: Bramson, R. Shaking up the State Workforce: An HR Shared Services Model, IPMA-HR News, February 2004.**

According to Ms. Bramson, Chief Human Resources officer of the Commonwealth of Massachusetts, “while reducing cost is clearly one motivator for this model, far more compelling is the interest in generating value and efficiency for what we do in managing the statewide workforce.” Their model enables decisions on transactional and non-strategic activities to move to a shared services organization. This provides personalized care for employees, leveraging key technology for partnering, change management, workforce development and organizational effectiveness capabilities. Technology platforms with increased functionality and direct access to information will provide support for the model.

The core principles that will guide this restructuring and the ongoing organization are:

- Connection – relationships and involvement
- Clarity – clear vision and direction
- Creativity – awaken innovative thinking
- Commitment – resolve and courage

Ms. Bramson states that, “these principles along with the shared service delivery model will ensure that the Commonwealth delivers professionally managed human resource services to its employees and agencies.”

## Conclusion

Organizations are re-thinking the ways in which HR operations can be delivered as part of a process of transforming the HR function. As organizations explore various options to increase the effectiveness of HR service delivery, it is important to ensure that an HR infrastructure exists that provides the appropriate support for the chosen option(s) and which embraces these necessary components:

- **Structure:** Organizing the HR function to enable effective collaboration, workflow, and customer focus.
- **Processes:** Determining which processes add value to the organization and redesigning them to deliver more efficiently or outsourcing them to someone who can.
- **Technology:** Identifying and implementing the technologies that are not only right for now, but are also adaptable to your changing organization and operational needs.
- **People:** Assessing the resource levels and skill sets required for the function to deliver required policies, services, programs, and information.

Only by improving operational efficiency and effectiveness will HR functions be able to concentrate on fulfilling their strategic role.

Some questions participants might wish to discuss, include:

1. What changes, if any, has your organization made to your HR service delivery processes?
2. What challenges, if any, have you encountered in effectively carrying out your HR service delivery functions
3. What types of HR systems or web-based technologies, if any, is your organization using to help transform HR into a more strategic role in the organization?
4. Do you outsource any of your HR Functions?
  - a) If yes, what functions are outsourced and what are the benefits to outsourcing these functions
  - b) If any problems or issues with outsourcing these functions, what are they?

5. Is your HR system centralized, decentralized or a combined system?
  - a) If yes, which HR functions are centralized and which functions have been decentralized?
  - b) What advantages and disadvantages has your organization encountered with either centralization or decentralization?



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