1992

Swing manager selection in fast food restaurants

Michael T. MacHatton

Iowa State University

Follow this and additional works at: https://lib.dr.iastate.edu/rtd

Part of the Home Economics Commons, and the Industrial and Organizational Psychology Commons

Recommended Citation


https://lib.dr.iastate.edu/rtd/10132

This Dissertation is brought to you for free and open access by the Iowa State University Capstones, Theses and Dissertations at Iowa State University Digital Repository. It has been accepted for inclusion in Retrospective Theses and Dissertations by an authorized administrator of Iowa State University Digital Repository. For more information, please contact digirep@iastate.edu.
INFORMATION TO USERS

This manuscript has been reproduced from the microfilm master. UMI films the text directly from the original or copy submitted. Thus, some thesis and dissertation copies are in typewriter face, while others may be from any type of computer printer.

The quality of this reproduction is dependent upon the quality of the copy submitted. Broken or indistinct print, colored or poor quality illustrations and photographs, print bleedthrough, substandard margins, and improper alignment can adversely affect reproduction.

In the unlikely event that the author did not send UMI a complete manuscript and there are missing pages, these will be noted. Also, if unauthorized copyright material had to be removed, a note will indicate the deletion.

Oversize materials (e.g., maps, drawings, charts) are reproduced by sectioning the original, beginning at the upper left-hand corner and continuing from left to right in equal sections with small overlaps. Each original is also photographed in one exposure and is included in reduced form at the back of the book.

Photographs included in the original manuscript have been reproduced xerographically in this copy. Higher quality 6" x 9" black and white photographic prints are available for any photographs or illustrations appearing in this copy for an additional charge. Contact UMI directly to order.
Swing manager selection in fast food restaurants

MacHatton, Michael T., Ph.D.

Iowa State University, 1992
Swing manager selection in fast food restaurants

by

Michael T. MacHatton

A Dissertation Submitted to the
Graduate Faculty in Partial Fulfillment of the
Requirements for the Degree of
DOCTOR OF PHILOSOPHY

Departments: Hotel, Restaurant, and Institution Management
Family and Consumer Sciences Education and Studies
Co-majors: Hotel, Restaurant, and Institution Management
Home Economics Education

Approved:

Signature was redacted for privacy.

In Charge of Major Work

Signature was redacted for privacy.

For the Departments

Signature was redacted for privacy.

For the Graduate College

Iowa State University
Ames, Iowa

1992
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INTRODUCTION</strong></td>
<td>1</td>
</tr>
<tr>
<td><strong>REVIEW OF LITERATURE</strong></td>
<td>7</td>
</tr>
<tr>
<td>Structured Interview Types</td>
<td>7</td>
</tr>
<tr>
<td>Situational interviewing</td>
<td>7</td>
</tr>
<tr>
<td>Patterned behavioral interviews</td>
<td>10</td>
</tr>
<tr>
<td>Structured Interview Development</td>
<td>12</td>
</tr>
<tr>
<td>Reliability and Validity of Structured Interviews</td>
<td>15</td>
</tr>
<tr>
<td>Research settings</td>
<td>15</td>
</tr>
<tr>
<td>Criterion measure issues</td>
<td>18</td>
</tr>
<tr>
<td>Methodological issues affecting reliability and validity</td>
<td>20</td>
</tr>
<tr>
<td>Summary of structured interview literature</td>
<td>26</td>
</tr>
<tr>
<td>Restaurant Industry Use of Selection Methodologies</td>
<td>27</td>
</tr>
<tr>
<td>Bio-data/Weighted Application Blanks</td>
<td>28</td>
</tr>
<tr>
<td>Assessment centers</td>
<td>34</td>
</tr>
<tr>
<td>Structured interviewing</td>
<td>36</td>
</tr>
<tr>
<td>Surveys of hospitality industry selection</td>
<td>39</td>
</tr>
<tr>
<td>Summary of Review of Literature</td>
<td>40</td>
</tr>
<tr>
<td><strong>PROCEDURE</strong></td>
<td>43</td>
</tr>
<tr>
<td>Structured Interview Guide Development</td>
<td>43</td>
</tr>
<tr>
<td>Organizational structure of the pilot test corporation</td>
<td>44</td>
</tr>
<tr>
<td>Advisory panel</td>
<td>46</td>
</tr>
<tr>
<td>Initial trait identification</td>
<td>47</td>
</tr>
<tr>
<td>Reduced trait selection</td>
<td>47</td>
</tr>
<tr>
<td>Final trait selection</td>
<td>49</td>
</tr>
<tr>
<td>Preliminary swing manager selection model</td>
<td>50</td>
</tr>
<tr>
<td>Identification of assessment methods for the selection model</td>
<td>52</td>
</tr>
<tr>
<td>Development of interview questions</td>
<td>53</td>
</tr>
<tr>
<td>Final development and review of instrument</td>
<td>56</td>
</tr>
<tr>
<td><strong>Pilot Tests</strong></td>
<td>58</td>
</tr>
<tr>
<td>Procedure</td>
<td>60</td>
</tr>
<tr>
<td>Findings</td>
<td>61</td>
</tr>
<tr>
<td>Field Test</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Field test instrument</td>
<td>63</td>
</tr>
<tr>
<td>SMSG training for field test managers</td>
<td>65</td>
</tr>
<tr>
<td>Field test data collection</td>
<td>67</td>
</tr>
<tr>
<td>Field test sample</td>
<td>70</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data Analysis</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>T-tests</td>
<td>73</td>
</tr>
<tr>
<td>Correlation matrix and cluster analysis</td>
<td>74</td>
</tr>
<tr>
<td>Multiple regression analyses</td>
<td>74</td>
</tr>
<tr>
<td>Validity coefficients</td>
<td>75</td>
</tr>
</tbody>
</table>

**FINDINGS AND DISCUSSION**

<table>
<thead>
<tr>
<th>Description of the Field Test Sample</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Test Group Comparisons</td>
<td>76</td>
</tr>
<tr>
<td>Factor in the Swing Manager Selection Guide</td>
<td>78</td>
</tr>
<tr>
<td>Prediction of Swing Manager Performance</td>
<td></td>
</tr>
<tr>
<td>The Nine-factor Equation</td>
<td>81</td>
</tr>
<tr>
<td>The Four-factor Equation</td>
<td>84</td>
</tr>
<tr>
<td>The Three-factor Equation</td>
<td>85</td>
</tr>
<tr>
<td>Comparison of the prediction equations</td>
<td>91</td>
</tr>
<tr>
<td>Validity of Alternative Selection Models</td>
<td>92</td>
</tr>
<tr>
<td>Original SMSG Model</td>
<td>93</td>
</tr>
<tr>
<td>Four-factor and Three-factor Models</td>
<td>94</td>
</tr>
<tr>
<td>Comparison of the prediction equations</td>
<td>95</td>
</tr>
<tr>
<td>Summary of Findings and Discussion</td>
<td>99</td>
</tr>
</tbody>
</table>

**SUMMARY AND CONCLUSIONS**

<table>
<thead>
<tr>
<th>Summary</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Instrument development and pilot testing</td>
<td>101</td>
</tr>
<tr>
<td>Field test</td>
<td>101</td>
</tr>
<tr>
<td>Data analysis</td>
<td>102</td>
</tr>
<tr>
<td>Findings</td>
<td>103</td>
</tr>
<tr>
<td>Conclusions and Recommendations</td>
<td>104</td>
</tr>
</tbody>
</table>
REFERENCES

ACKNOWLEDGMENTS

APPENDIX A. INTERVIEW GUIDE, IOWA
APPENDIX B. CREW PERFORMANCE REVIEW, IOWA
APPENDIX C. CREW PERFORMANCE REVIEW, WISCONSIN
APPENDIX D. SWING MANAGER SELECTION GUIDE (SMSG), IOWA
APPENDIX E. SWING MANAGER SELECTION GUIDE (SMSG), WISCONSIN
APPENDIX F. VIDEO SCRIPT
APPENDIX G. PERFORMANCE REVIEW OF SWING MANAGERS, WISCONSIN
APPENDIX H. APPLICATION BLANK, IOWA
APPENDIX I. APPLICATION BLANK, WISCONSIN
## LIST OF TABLES

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 1</td>
<td>Frequency and point totals for the swing manager success characteristics</td>
<td>51</td>
</tr>
<tr>
<td>Table 2</td>
<td>Demographics of the pilot test sample</td>
<td>62</td>
</tr>
<tr>
<td>Table 3</td>
<td>Demographics of the field test sample</td>
<td>77</td>
</tr>
<tr>
<td>Table 4</td>
<td>Swing Manager Selection Guide (SMSG) scores of promoted versus nonpromoted candidates</td>
<td>79</td>
</tr>
<tr>
<td>Table 5</td>
<td>Performance Review of Swing Managers (PRSM) scores of SMSG-selected versus non-SMSG-selected managers</td>
<td>80</td>
</tr>
<tr>
<td>Table 6</td>
<td>Swing Manager Selection Guide (SMSG) item correlations</td>
<td>82</td>
</tr>
<tr>
<td>Table 7</td>
<td>Prediction of swing manager performance based on biographical and interview data</td>
<td>86</td>
</tr>
<tr>
<td>Table 8</td>
<td>Validity coefficients between Swing Manager Selection Guide (SMSG) scores and Performance Review of Swing Managers (PRSM) scores</td>
<td>94</td>
</tr>
</tbody>
</table>
LIST OF FIGURES

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 1</td>
<td>Dasher Management (Iowa) restaurant organization chart with typical staffing levels</td>
<td>45</td>
</tr>
<tr>
<td>Figure 2</td>
<td>Initial, reduced, and final lists of &quot;success&quot; characteristics sought in swing managers</td>
<td>48</td>
</tr>
<tr>
<td>Figure 3</td>
<td>Swing Manager Selection Guide (SMSG) equation</td>
<td>52</td>
</tr>
<tr>
<td>Figure 4</td>
<td>Crew performance review items used in the preliminary swing manager selection instrument</td>
<td>54</td>
</tr>
<tr>
<td>Figure 5</td>
<td>Courtesy Corporation (Wisconsin) restaurant organization chart</td>
<td>64</td>
</tr>
<tr>
<td>Figure 6</td>
<td>Comparison of Wisconsin and Iowa Swing Manager Selection Guide (SMSG) formats</td>
<td>66</td>
</tr>
</tbody>
</table>
INTRODUCTION

Human resource problems in the United States restaurant industry have reached crisis proportions (Ishak & Murmann, 1990; Umbreit, 1987). Turnover of hourly employees in the industry has ranged from 60% to 200% (Van Dyke & Strick, 1988); management turnover has ranged from 20% to 60% (McFillen, Riegel, & Enz, 1986).

Absenteeism was also high in the restaurant industry. On any given day, absenteeism of 10% to 29% was considered normal in many operations (B. Fox, personal communication, July 26, 1991; D. Urbanski, personal communication, April 3, 1991). Estimates of the monetary cost of turnover and absenteeism ranged from $95 to $1,500 per employee in restaurants (Van Dyke & Strick, 1988).

Less quantifiable, but equally important, are human resource problems that contribute to poor job performance. Performance problems, such as the server who is rude to the guest or the cashier who makes mistakes handling, cash can often be traced to ineffective human resource practices. These and other performance problems cause operators to lose goodwill, customers, and money (Jesitus, 1991).

Human resource problems in the restaurant industry are serious and costly; effective selection of employees and managers has been shown to help reduce these problems. Yet, despite the importance of effective selection to the restaurant industry, a review of literature published over the past 15 years in the major restaurant-related journals and
magazines found only 16 articles that focused on employee selection. Of these, only 7 were research based.

Outside of the restaurant industry, a variety of selection methodologies and instruments have been developed and used over the past 80 years, including cognitive tests, integrity tests, bio-data, assessment centers, and structured interviews. Although these selection methodologies differ in many ways, they are evaluated by the same set of standards used to evaluate any type of test: reliability, validity, and usability (American Psychological Association, 1985). Most nonhospitality industry studies of selection instruments focus on validity and reliability; very few address the issue of usability (Latham, 1989).

The emphasis on validity and reliability has produced many high-quality instruments. Unfortunately, the lack of attention to usability has resulted in most selection instruments and methodologies being used in research and reported in scholarly journals, instead of in wide use in actual personnel selection (Hammer & Kleiman, 1988).

Evidence suggesting that human resource professionals seldom use scientific selection methodologies can be found in a study by Hammer and Kleiman (1988). The 750 personnel directors surveyed were chosen from United States members listed in the membership directory of the American Society for Personnel Administration. Survey results indicated that bio-data, cognitive testing, and other scientific selection methodologies combined were used by less than 10% of the sample. Lack of practitioner knowledge and resources such as time, personnel, and money were the primary reasons given for not using scientific selection methods.
If industry as a whole finds most scientific selection methodologies impractical, the restaurant industry may very likely find scientific selection even more impractical. Most medium- to large-sized companies outside of the restaurant industry employ human resource specialists to direct and/or perform the selection function (Muchinsky, 1989). However, at the unit level, very few restaurant companies employ human resource specialists (B. Mehrman, personal communication, July 26, 1991; T. Van Dyke, personal communication, July 27, 1991). As a result, the operations manager must attempt to fit human resource responsibilities in with his/her other duties. Thus, employee selection is likely to be hurried, intuitive, and ineffective, further compounding the problems of turnover, absenteeism, and poor performance (Umbreit, 1987).

An examination of the general personnel selection literature, as well as the restaurant industry literature, suggested that the interview would be the selection methodology best suited to the restaurant industry. Although interviews had a poor reputation for reliability and validity in the 1970s and early 1980s (Arvey & Campion, 1982; Reilly & Chao, 1982), innovations in interviewing have caused many industrial psychologists to revise their opinions of the value of interviews (Wiesner & Cronshaw, 1988).

Interviews continue to be the most widely used selection methodology in the United States (Eder, Kacmar, & Ferris, 1989) and Europe (Shackleton & Newell, 1991). Industry practitioners seem comfortable using interviews as part of the selection and promotion process; applicants also seem to accept interviews as a selection device (Campion & Arvey, 1989). A
solution to improved selection is to develop, test, and use an improved interview format.

Improvement of the selection process in the restaurant industry requires a careful examination and concern for the issues of instrument validity, reliability, and usability. Therefore, the purposes of this study were to:

1. Develop an interview procedure for selection of swing managers in fast food restaurants that would be valid, reliable, and usable.
2. Determine the personal, situational, and business characteristics that best predict swing manager performance.

The following definitions were used for this study.

**Swing Manager**: An entry-level manager in most fast food restaurants. This position is sometimes called "crew trainer" or "shift manager." These managers are usually paid by the hour, often work part time, and are frequently still in school. The swing manager position is analogous to first-line supervisory or lead worker positions in other industries.

**Employment Interview**: "The face-to-face exchange of job-relevant information between organizational representatives and [candidates] with the overall organizational goal of attracting, selecting, and retaining a highly competent workforce" (Eder et al., 1989).

**Structured Interview**: An interview format wherein the interviewer asks predetermined questions of each applicant, using the same wording. Answers are usually assigned numerical scores to aid in comparing candidates (Heneman, Schwab, Fossum, & Dyer, 1986).
Critical Incidents: Observable behaviors that result in some level of good or poor job performance. The Critical Incident Method was developed by Flanagan in 1954 (Flanagan, 1954).

Validity: The degree to which evidence supports the appropriateness, meaningfulness, and usefulness of the inferences made from instrument results. Although validity is a unitary concept, content-related, criterion-related, and construct-related evidence of validity are often gathered to support the validity of inferences made from instrument results (American Psychological Association, 1985).

Reliability: The degree to which scores are free from measurement errors. Internal consistency reliability is most often reported in the literature (American Psychological Association, 1985).

Usability: The degree to which an instrument is easy to understand, administer, and interpret. In addition, time requirements and cost factors are often included in discussions of usability. In most cases, a low-cost, easily understood instrument that can be quickly administered will be considered more usable than an expensive, complex, time-consuming instrument (Gronlund & Linn, 1990).

The cost of poor employee selection is high. Turnover, absenteeism, burnout, theft, and poor performance cost the restaurant industry millions of dollars each year. Improved employee selection can help reduce these problems. The present study, which is intended to help improve employee selection, can make a contribution to this vital area.

The selection instrument tested in the study used structured interviewing methodology and performance review data, and was based on
review of the literature and extensive input from managers in the participating fast food organizations. The instrument was pilot-tested with 7 McDonald's restaurants in central Iowa and field-tested in 16 McDonald's restaurants in Wisconsin.
REVIEW OF LITERATURE

The purpose of this study was to develop and test a methodology for selection of swing managers in fast food restaurants. Because the project methodology was in large part based on structured interviewing theory and methods, the review of literature addresses structured interview types, structured interview development, and reliability and validity of structured interviews. The second area reviewed was the hospitality industry literature that focused on restaurant industry use of selection methodologies.

Structured Interview Types

The two best known and most widely studied structured interview formats are the Situational Interview (Latham, Wexley, & Pursell, 1975; Latham, 1989) and the Patterned Behavioral Description Interview (Janz, 1982; Janz, 1987). New formats such as the Comprehensive Structured Interview (Pursell, 1988) continue to appear. In most cases, these new formats are "hybrids" combining elements of Situational Interviews and Patterned Behavioral Description Interviews.

Situational interviewing

Situational interviewing was conceived and developed by Gary Latham in the late 1970s. In a series of studies, Latham described the rationale, development, testing, validity, and use of situational interviews (Latham et al., 1975; Latham & Wexley, 1977; Latham, Saari, Pursell, & Campion, 1980; Latham & Saari, 1984). Further testing has

Situational interviews typically present job related situations to the interviewee and ask what he/she would do in the situations (Latham, 1989). In most cases, the situational questions are based on job analyses and are intended to be extremely realistic. A written scoring guide is included with each question. The guide is usually a Behaviorally Anchored Rating Scale (BARS). BARS scales are based on actual job relevant critical incidents and include at least three behaviors which represent examples of good, average, and poor behavior (Latham et al., 1980). The interviewee is not allowed to see the interview guide or the scoring guides.

Interviewees are assigned a score for each answer; all scores are then used to compute an overall interview score. An example of a situational question with rating scale, from Latham (1989), follows:

You are in charge of truck drivers in Philadelphia. Your colleague is in charge of truck drivers 800 miles away in Atlanta. Both of you report to the same person. Your salary and bonus are affected 100% by your costs. Your buddy is in desperate need of one of your trucks. If you say no, your costs will remain low and your group will probably win the Golden Flyer award for the quarter. If you say yes, the Atlanta group will probably win this prestigious award because they will make a significant profit for the company. Your boss is preaching costs, costs, costs as well as cooperation with one’s peers. Your boss has no control over accounting who are the score keepers. Your boss is highly competitive, he or she rewards winners. You are just as competitive, you are a real winner!

Explain what you would do.

[Record Answer]
Scoring Guide
1. I would go for the award. I would explain the circumstances to my buddy and get his or her understanding.
3. I would get my boss' advice.
5. I would loan my truck to my buddy. I'd get recognition from my boss and my buddy that I had sacrificed my rear-end for theirs. Then I'd explain my logic to my people. (p. 172)

This example illustrates the three essential components of situational interview items: Items are job related (in this case, based on an actual critical incident); items are realistic, even making use of the vernacular rather than formal English; and items include rating scales anchored by realistic responses to the situation (based on in-depth job analyses). However, items must not be overly technical; applicants with little job-specific experience should still have a good chance of responding appropriately.

The standard for reliability coefficients in industrial psychology studies appears to be .70 to .80. Wiesner and Cronshaw (1988) calculated the mean reliability of interview studies; the mean reliability coefficient for individual structured interviews averaged .78.

The standard for validity coefficients in industrial psychology studies seems to be .25. Reviews of the selection interview research by Harris (1989) and Wiesner and Cronshaw (1988) reported average validity coefficients of .25 to .35.

Evidence of reliability and validity appears to be acceptable for the situational interview. Latham and Saari (1984) developed a situational interview guide for clerical workers and tested the guide with a sample of 29 currently employed clerical workers. Internal consistency of the guide was .73 (Cronbach's alpha); inter-rater reliability between users of the
guide was .81. The validity coefficient correlating interview guide scores and supervisory ratings of performance was .39 (p<.05).

Weekley and Gier (1987) developed a situational interview guide for selection of sales clerks in jewelry stores. Following this developmental phase, the guide was tested on a sample of 54 sales clerk applicants. Internal consistency of the guide was .61 (Cronbach's alpha); inter-rater reliability between users of the interview guide was .84. The validity coefficient correlating interview guide scores and sales per selected employee was .45.

Robertson et al. (1990) constructed a situational interview guide for use in promotional decisions in a large financial services company. The developed guide was tested on 106 candidates for promotion; 63 of the candidates were promoted, 43 were not promoted. Internal consistency of the guide was .71 (Cronbach's alpha). Two validity scores were computed, one correlating interview performance scores with supervisory assessments of performance, the second correlating interview scores with supervisory assessments of potential for advancement. Interview scores correlated positively with performance ratings (coefficient of .28, p<.05) and with ratings of potential for advancement (coefficient of .33, p<.005).

**Patterned behavioral interviews**

Patterned Behavioral Descriptive Interviewing (PBDI), generally identified with Tom Janz, was conceived in the early 1980s. Janz and associates described the PBDI in several articles throughout the decade (Janz, 1982; Janz, Hellervik, & Gilmore, 1986; Janz, 1987).
PBDIs offer representative job related situations to the interviewee and ask the interviewee to describe how he/she has handled such situations in the past. Rather than ask the candidates, "What would you do if (such and such happened)?" as in situational reviews, the PBDI asks, "What did you do when (such and such happened)?" (Janz, 1982, p. 577). Thus, the PBDI assesses and scores actual past behavior instead of intentions or hypothetical behavior. Other than this major difference, PBDIs are remarkably similar to situational interviews.

PBDIs, like situational interviews, are developed via job analyses. Written scoring guides are included with each question; these guides are behaviorally anchored scales. PBDIs generally are used with only one interviewer (Janz et al., 1986).

Evidence of reliability seemed to be weak for the PBDI; however, evidence of validity was satisfactory. Janz (1982) developed and tested a PBDI format to be used in the selection of teaching assistants. Eight undergraduate business students were trained in "traditional" interview strategies such as active listening and building rapport; another group of eight students was trained in the use of PBDIs. Sixty candidates were evaluated, half by the traditional group of interviewers and half by the PBDI group. The inter-rater reliability scores for the PBDI group were lower than that of the "traditional" group (.46 versus .71). However, the validity coefficient representing the correlation between interview scores and performance as a teaching assistant was higher for the PBDI group than for the "traditional" group (.54, p<.01, versus .07). End-of-semester student ratings were used in evaluating teaching assistant performance.
Orpen (1985) developed and tested a PBDI format for predicting performance of life insurance sales persons. A sample of 19 currently employed sales persons was interviewed using the PBDI. Test-retest reliability was .72. Criterion-related evidence of validity as suggested by the correlation between PBDI scores and supervisory ratings was .48 (p<.05).

Unfortunately, most of the Janz studies have been laboratory studies using college students, much like the Janz (1982) study. The PBDI has been criticized by Latham (1989) and others for this overreliance on laboratory settings, as well as small sample sizes.

Having reviewed the main types of structured interviews, the next step is to examine the development processes integral to structured interviews. Researchers such as Latham (1989) emphasized the crucial role proper developmental procedures play in effective structured interview formats.

Structured Interview Development

Situational interviews and PBDIs typically use the same procedure for development of interview questions and scoring guides (Janz et al., 1986; Latham, 1989; Campion et al., 1988; Pursell, 1988). The usual procedure, as documented by Latham (1989), is:

1. Conduct a job analysis using the critical incident technique.
2. Develop an appraisal instrument such as behavioral observation scales based on the job analysis (Latham & Wexley, 1977, 1981).
3. Select one or more incidents as the basis for the development of the performance criteria.
4. Turn each critical incident into a "what would you do if..." question.

5. Develop a scoring guide to facilitate agreement among interviewers on what constitutes a good (5), acceptable (3), or an unacceptable (1) response to each question. If descriptions can be developed for 2 and 4 ratings, do so.

6. Review the questions for comprehensiveness in terms of covering the material identified in the job analysis and summarized on the appraisal instrument.

7. Conduct a pilot study to eliminate questions where applicant/interviewees give the same answers, or where interviewers cannot agree on the scoring.

8. Conduct a criterion-related validity study when feasible.

An example of situational interview development is provided by Weekley and Gier (1987); they used situational interviews to select jewelry store sales clerks. An open-ended questionnaire was designed that contained a description of a hypothetical critical incident, the background of the incident, and the consequences of some type of action. The questionnaires also included two actual incidents, one positive and one negative. The questionnaire then was sent to an unspecified number of appropriate managers and job incumbents; each respondent was asked to describe six critical incidents for the sales clerk position. Approximately 400 usable incidents were collected via the questionnaire. Thirty-six situational questions were developed from the critical incidents. Using a panel of four job experts, five-point BARS-type scoring guides were developed for each question, with the anchors of good, average, and poor performance statements corresponding to 5, 3, and 1 on the response scale.

Next, the questions were pilot tested using a sample of 14 current managers as interviewers and 21 current employees as interviewees. Following these mock interviews, participants were debriefed to discover
if some items were ambiguous or incorrect. Four items were changed or dropped. Pilot test data were analyzed and 16 questions were selected that maximized inter-rater reliability and total score variance. Inter-rater reliability for the resulting interview schedule was .84 and internal consistency (Cronbach's alpha) was .61.

Finally, the validation phase of the project was initiated, with 54 applicants for sales clerk positions being interviewed and scored by an operations manager or a personnel manager. Of the 54 applicants, 24 were selected for the sales position. After nine months in position, sales productivity was calculated for each selected sales clerk. The validity coefficient, as represented by the correlation between interview scores and sales productivity, was .45 (p<.02).

Other studies, including those of Robertson et al. (1990), Latham and Saari (1984), Orpen (1985), and Pursell (1988) followed development procedures very similar to those of Weekley and Gier (1987). The only area in which researchers seem to have differed was in the methods of job analyses used. Some researchers used questionnaires to gather critical incidents (Weekley & Gier, 1987); others used advisory panels (Murphy & Constans, 1987); still others used observation of job incumbents (Arvey, Miller, Gould, & Burch, 1987). In some cases, such as Robertson et al. (1990), several job analysis techniques were combined.

Goodale (1989) suggested that future researchers should consider using a small advisory group consisting of managers and job incumbents to identify major job responsibilities and attributes needed for success. This same group then could help write situational questions and answers
for each responsibility and/or attribute. According to Goodale (1989), using such a group would help make structured interview development easier, less time consuming, less expensive, and therefore more practical than Latham's situational interview developmental scheme.

Additional support for Goodale's suggestion comes from Wiesner and Cronshaw's (1988) meta-analytic review of interview reliability and validity. In their review, the mean validity coefficients for less formal job analytic procedures (these procedures include advisory groups and other less rigorous job information sources) was .35, as opposed to .48 for the more formal job analytic procedures such as those advocated by Latham (1989). In many industry settings, a validity coefficient of .35 might be acceptable, especially if the selection methodology was more easily and inexpensively developed.

Reliability and Validity of Structured Interviews

The interview research literature tends to focus on three issues that relate to reliability and validity. The first of these issues is interview research settings; the second issue is selection of criterion measures and the potential for escalation bias; and the third issue is the effect of various procedures on interview reliability and validity. Each of these issues will be reviewed in separate sections.

Research settings

Most of the reported selection interview research efforts in the 1970s and early 1980s were conducted in laboratory settings (Dipboye &
Flanagan, 1979; Mullins, 1982; Janz, 1982). Between 1978 and 1983, 87% of the published studies in selection research were laboratory-type studies (Barr & Hitt, 1986). These studies used college students as subjects; in some studies, students played the role of interviewee; in other studies, they acted as interviewers. Frequently, both the parts of interviewee and interviewer were played by students.

The tendency to use college students in artificial settings has been decried since the 1940s when McNemar (1946, p. 333) claimed that "the existing science of human behavior is largely the science of the behavior of sophomores." However, only with the appearance of several empirically based studies in the 1980s (Guion, 1983; Barr & Hitt, 1986; Gordon, Slade, & Schmitt, 1986) did researchers begin to question seriously the generalizability of such laboratory studies. Barr and Hitt (1986) compared student (214 upper-level business students) and manager (68 middle managers) responses towards videotaped résumés. They found that the student sample was significantly more lenient, recommended higher starting salaries, used different decision criteria, used more decision criteria, and had lower inter-rater agreement than the managerial sample.

Gordon et al. (1986) reviewed 32 studies which had used both student and nonstudent samples in similar situations. The studies reviewed were published between 1969 and 1984; 19 of the 32 studies (59%) reported significant differences between student and nonstudent samples. Four studies found nonstudent samples to be more accurate in judgments, and four studies found nonstudent samples to be more lenient in evaluations. Other differences included: perceived importance of various pieces of
information, relative importance of cost concerns, consistency of
decisions, and speed of decision making. Comparing the two groups, most
of the findings of the studies indicated that results differed in the
student versus managerial samples, with students being more lenient and
less cost conscious than actual managers.

Another feature of these studies was their reliance on "paper
people." The term "paper people" was coined to describe the composite of
expanded résumés and application blanks used as stimuli in many studies.
Paper people were lower cost stand-ins for video interviews or flesh and
blood human beings.

The use of paper people, in vogue through the 1970s, was criticized
in a series of articles in the late 1970s and 1980s. Gorman, Glover, and
Doherty (1978) discussed the many validity problems of using paper people,
especially the issues of nonverbal behavior and interviewee appearance
interacting with objective credentials. Their study found significant
differences in rater responses to paper people as compared to actual
interviews, such as the role of interpersonal dynamics and impression
management in influencing interview outcomes. Okanes and Tschirsi (1978)
and McGovern, Jones, Warwick, and Jackson (1981) found similar problems in
using paper people.

Today most researchers advocate field studies wherever possible,
using actual managers and real applicants (Kacmar, Ratcliff, & Ferris,
1989; Harris, 1989). Kacmar et al. (1989) pointed out the deficiencies of
interview research in laboratory studies: susceptibility to experimental
artifacts, artificiality, lack of accountability on the part of interviewers, and oversimplification of selection dynamics.

**Criterion measure issues**

Two important research issues that need to be investigated are: (a) selection of appropriate criterion measures for interview studies (Dreher, Ash, & Hancock, 1988); and (b) effect of the interviewer as a performance rater on criterion measures, known as escalation bias (Schoorman, 1988). Both issues are particularly relevant to field research.

**Criterion measures** Most interview research has made use of job performance ratings as the criterion measure to be predicted from interview scores (Latham, 1989; Harris, 1989). Recently, use of additional criterion measures has been advocated. Dreher et al. (1989) reviewed recent interview studies and asserted that important employee dimensions, such as willingness to work, were not being adequately assessed in most performance reviews. Additional criterion measures that might be used are job satisfaction, turnover, sales productivity, absenteeism, and loyalty. Although performance reviews are important criterion measures, inclusion of additional measures such as job satisfaction might demonstrate that the interview is indeed a good predictor of success (Dreher et al., 1989).

**Escalation bias** Escalation bias refers to the tendency of the performance rater to justify earlier interview scores by biasing performance review ratings. Bazerman, Beekum, and Schoorman (1982) found
that individuals tend to give higher evaluations to persons whom they had
selected earlier. However, their study was a laboratory study using
students in artificial situations. Schoorman (1988) attempted to
replicate the Bazerman et al. (1982) study in a field setting using 167
managers and 354 non-supervisory personnel. Managers were asked to
evaluate workers' performance using specially developed review forms. In
addition, each manager was asked if he/she had participated in the rated
employee's hiring decision, and if he/she agreed with the original hiring
decision. In 151 cases (43%) the same manager had participated in both
the original hiring decision and the performance evaluation. The
remaining 200 evaluation cases (57%) had managers who had not participated
in the original selection decision. Although he did find that escalation
bias significantly affected performance reviews (p<.05), Schoorman's
results explained only 6% of the variance in the performance review
scores. Such a small amount of explained variance may be statistically
significant, but is not practically significant.

As part of a larger two-year study investigating the validity and
usability of structured interviews for selection of seasonal sales clerks,
Arvey et al. (1987) investigated potential escalation bias. In year one,
756 applicants were interviewed by 141 store managers. Four to six weeks
after hiring, the successful applicants (n=558) were given performance
reviews. Complete review data were obtained for 312 of the 558 selected
applicants. Most of the interviewers in the study also were the
performance raters of the successful candidates they had selected earlier.
The correlation coefficient between interview scores and performance review scores was .34 (p<.01). Due to concerns about possible escalation bias, a procedure for evaluating potential escalation bias was added to the second year of the study. In the second year, 774 applicants were interviewed of which 447 were hired. Complete performance review data were obtained for 205 of the selected applicants; the correlation between interview scores and performance review scores was .51 (p<.01).

To ensure that escalation bias did not affect performance review scores and hence the validity coefficients, correlation coefficients were calculated between selection interview scores and performance rating scores for a group of workers who were selected by one manager and performance rated by a different manager (n=44). The correlation coefficient for this non-escalation-prone group of .54 (p<.01) was compared with the coefficient for the total group, which was .51 (p<.01). Escalation bias did not appear to inflate the validity coefficients reported in the study.

Fortunately, although escalation bias may occur in some instances, its role in biasing performance ratings appears to be minor. Many field studies cannot avoid some escalation bias because unit managers routinely select and evaluate all personnel.

Methodological issues affecting reliability and validity

Two of the important goals in interview research are to establish acceptable reliability and provide evidence of validity. Four procedures
are proposed to improve reliability and validity (Latham et al., 1980; Latham, 1989). These are:

1. Use of identical questions for each interviewer/interviewee dyad (Latham et al., 1980).
2. Use of behaviorally anchored scoring guides, such as Behaviorally Anchored Rating Scales (BARS) (Wiesner & Cronshaw, 1988; Latham, 1989).
3. Training of interviewers in the use of the interview format (Dougherty, Ebert, & Callender, 1986).
4. Use of panel interviews, where three to five individuals conduct the interview (Latham et al., 1980; Latham, 1989).

**Use of identical questions** One way to enhance reliability is to ask identical questions in each interview with no individually initiated follow-up questions. Several studies support this approach with empirical and meta-analytic evidence. Robertson et al. (1990), in a study on selection of management employees for a large bank, emphasized that all interviewees were asked the same questions in the same order. The only follow-up question allowed was, "Is there anything else you would like to add?" (Robertson et al., 1990, p. 72). The reliability coefficient for the situational interview was .71 (Cronbach's alpha); the validity coefficient, represented by the correlation between interview scores and later performance reviews, was .28 (p<.05).

Wiesner and Cronshaw (1988) constructed a meta-analytic review of interview research studies of the past 30 years. They found that structured interview formats, using predetermined questions in a specific
order, were superior to traditional, unstructured interviews. Mean alpha reliability of structured interviews was reported at .82, while the mean alpha reliability of unstructured interviews was reported at .61. The mean validity coefficient (criterion-related evidence of validity) for structured interviews was .34; unstructured interviews averaged .17.

**Use of behaviorally anchored scales** A more controversial issue is the use of behaviorally anchored scales (BARS) in scoring structured interviews. Behaviorally anchored scales were accepted as the most reliable and valid scales for use in performance evaluations and interview guides throughout the 1970s and early 1980s based on the promising results of Latham and Wexley (1977), Latham and Saari (1984), and Janz (1982, 1987). These researchers reported validity coefficients of .28 to .54 in their studies. However, recent studies have questioned the reliability, validity, and usability of such scales.

The first published study questioning the use of BARS was that of Murphy and Constans (1987) investigating the possibility of behavioral anchors serving as a source of bias in the rater. Such ratings bias could seriously undermine reliability of instruments; lower reliability also could hurt validity. In an experiment to study the effect of behavioral anchors, 180 undergraduate students served as raters of a videotaped lecture: 60 students utilized BARS-type scales which featured positive behaviors that actually occurred on the tape; 60 students utilized BARS featuring negative behaviors that occurred on the tape; and 60 students used BARS that did not feature any actual incidents occurring on the tape. Behavioral anchors seemed to bias a rater's evaluation by:
Focusing the rater’s attention on specific expressions of behavior similar to those depicted in the behavioral anchors.

2. Biasing memory of behaviors or behavioral intentions. The rater tended to recall behaviors that were similar to the behavioral anchors and tended to forget behaviors that were not similar to the anchors.

Piowtrowski, Barnes-Farrell, and Esrig (1989) replicated and extended Murphy and Constans’s (1987) study. A group of 183 undergraduate students was divided into three groups. Similar to the Murphy and Constans (1987) study, one group used BARS containing examples of positive behavior actually found on the tape; one group used BARS containing examples of negative behavior actually found on the tape; and the third group used BARS which did not contain any examples of behavior found on the tape. The stimulus tape depicted a waiter in typical customer service situations. A time delay was introduced and the original three groups were further subdivided into "immediate raters" and "delayed raters." Delayed raters rated the video performance one week after viewing the tape.

Raters tended to overlook behaviors that were not represented in the behavioral anchors. In addition, raters tended to overemphasize behaviors, good or bad, that were similar to behavioral anchors. This rating bias was found to be both immediate and long term (after one week delay before rating).

Despite the early promise of BARS as part of structured interview formats, the Murphy and Constans (1987) and Piowtrowski et al. (1989)
studies cast doubt on the reliability of BARS-type scales. Although the use of BARS has been called into question, some researchers such as Latham (1989) and Robertson et al. (1990) continued to use BARS and argue for the important role of behavioral anchors in structured interviewing. On balance, it appears that BARS offer no advantage to simpler rating scales, and may actually introduce bias into the evaluation process.

**Interview training** Training of interviewers to improve inter-rater reliability has been investigated in several studies. Spool (1978) reviewed 25 years of studies on rater training and concluded that training usually was effective in improving accuracy of observations. Dougherty et al. (1986) trained actual personnel professionals in obtaining relevant information from interviews and using this information to rate interview dimensions. Mock interviews were used heavily in the training process. Those interviewers who underwent training showed significant improvement in the validity of their interview decisions from an average of .098 before training to an average of .298 after training. Dougherty implied that the improvement in validity coefficients was a result of improved reliability.

Borg and Gall (1989) advocated thorough training for observers to improve both the accuracy of observation and inter-rater reliability. A key element of such training was the use of videotaped scenarios similar to those which the trainees would encounter after training. In addition to the effectiveness of videotape in training, Borg and Gall (1989) suggested using video scenarios as a way of assessing inter-rater reliability prior to beginning field observations.
Four studies in the 1980s used videotaped work samples and interviews as a key element of interviewer/evaluator training. As part of a study investigating common rating errors, Pursell, Dossett, and Latham (1980) instructed six supervisors to evaluate 47 electricians under their supervision. Supervisor ratings were then correlated with objective performance measures, resulting in very low validity coefficients on each dimension (-.02 to -.12). One year later, the same supervisors received an 8-hour training program which made extensive use of videotaped scenarios. The supervisors then evaluated the same 47 electricians, and the supervisor ratings were correlated with objective performance measures. A total of four out of five dimensions showed significant correlation with supervisory ratings (r=.36 to r=.63; p<.05).

Studies by Fay and Latham (1982), Gist, Schwoerer, and Rosen (1989), and Sprongers and Hoogstraten (1989) all included video training as one of the research questions involved in their respective studies. In every case, video training was found to be effective. The Gist et al. study (1989) found use of videotaped scenarios and demonstrations to be superior to interactive tutorials when training managers to use computer software. Video-trained subjects received a mean performance test score of 19.36, compared to a mean score of 17.08 for tutorial-trained subjects (F=6.70, p<.01).

Use of interview panels Use of interviewer panels to obtain greater reliability and validity has been advocated and investigated by Latham (1989) and Arvey and Campion (1982). Despite some positive findings, most recent interview research does not make use of panel
interviews. Wiesner and Cronshaw (1988), as part of their meta-analytic review of interview validity, investigated the impact of panel interview formats versus single interviewer formats on reliability and validity of structured interviews. After reviewing more than 150 studies, they concluded that the panel format was only slightly more reliable and no more valid than the single interviewer format. The mean reliability coefficient for panel interviews was .85, as compared to .78 for individual interviews. The mean validity coefficient for panel interviews was .33, while the average validity coefficient for single interviewers was .35.

In summary, interview reliability and validity may be improved by using identical questions in the same order with no individually initiated follow-up questions (Robertson et al., 1990; Wiesner & Cronshaw, 1988). Interview reliability and validity do not seem to be improved by using rigorously developed behaviorally anchored rating scales such as BARS; such scales may actually cause bias in observation and decision making (Murphy & Constan, 1987; Piowtrowski et al., 1989). Training interviewers appears to improve the reliability and validity of their judgments ( Dougherty et al., 1986; Spool, 1978). In addition, use of interview panels does not appear to improve the reliability or validity of interview judgments (Wiesner & Cronshaw, 1988).

Summary of structured interview literature

After a review of the industrial psychology literature, structured interviews appeared to offer evidence of reliability and validity. Field
studies were regarded as more valid and generalizable to "real world" settings than were laboratory studies using "paper people" and student volunteers (Gordon et al., 1986). Use of multiple criterion measures, as opposed to reliance on performance reviews alone, was advocated (Harris, 1989; Dreher et al., 1988). Escalation bias concerns were reviewed; escalation bias appeared to be a minor problem (Arvey et al., 1987; Schoorman, 1988).

Using identical questions in identical order appeared to improve the reliability and validity of interviews (Wiesner & Cronshaw, 1988). The use of Behaviorally Anchored Rating Scales (BARS) seemed to have little or no positive impact on interview reliability and validity; some researchers found that rater bias was greater when BARS were used (Murphy & Constans, 1987). Training of interviewers, especially video training, appeared to improve the reliability and validity of interviews (Dougherty et al., 1986; Gist et al., 1989). Panel interviews seemed to have slightly higher reliability coefficients than individual interviews, but were no more valid than individual interviews (Wiesner & Cronshaw, 1988).

Restaurant Industry Use of Selection Methodologies

Personnel selection, like many other human resource topics, has received little attention in the restaurant industry literature. Reviewing the major restaurant related journals from 1975 to 1992, including the Cornell Hotel and Restaurant Quarterly, The Hospitality Education and Research Journal, the International Journal of Hospitality Management, and the FIU Hospitality Review, only 16 articles were found
that focused on employee selection. Of these 16, only 7 were research-based studies focusing on scientific selection methodologies. Because of the paucity of industry-specific selection studies, all selection-related literature is reviewed. The studies found in the hospitality literature could be categorized as:

2. Assessment center studies.
3. Structured interview studies.

Bio-data/Weighted Application Blanks

Bio-data methodology makes use of biographical data derived from application blanks. These data may be demographic or consist of responses to situational questions. Application blank items which discriminate between high-performing and low-performing employees are selected and assigned importance weights; the resulting instrument is termed a Weighted Application Blank (WAB). Future applicants complete the WAB and applicants with high scores are hired while low-scoring applicants are rejected (Mumford & Owens, 1987).

To date, Mitchell (1989) published the only report in the restaurant-related literature on WAB use. In his report, Mitchell described the development, validation, and use of a WAB by a 1,200-room southeastern United States hotel in the screening of applicants for both rooms division and food and beverage division positions. Positions studied included housekeepers, bartenders, food servers, and desk clerks. When fully
staffed, about half of the hotel's 1,500 employees would be in the food and beverage division; the remainder would be in the rooms division, maintenance, or staff positions.

Development of the WAB and initial validation was conducted with employee data from two sister properties in the same general geographic area. Application forms were obtained for 161 short-tenure employees, defined as employees who voluntarily terminated their employment in less than six months, and 141 long-tenure employees, defined as employees with more than six months employment with the company. All 302 application blanks were coded according to information found on the forms (52 bits of biographical and demographic information).

After coding, chi-square computations were performed on each of the 52 variables; items that showed potential for discriminating between employees were entered into discriminant function analysis. Of the 302 application blanks, 50 short-tenure applications and 50 long-tenure applications were held out for validation of the WAB.

Seven items emerged from the analysis as potentially useful predictors; these items were regarded as proprietary and were not discussed. A computer program was developed so that personnel clerks could enter the seven items, along with six nonsignificant items. These nonsignificant items were added to protect the confidentiality of the process. An overall score was calculated for each person's application based on the discriminant function analysis. Scores of 3.0 or greater were considered good; a score of less than 3.0 was considered poor.
After the scoring model and computer program were developed, a validation test was conducted using the 100 applications held out earlier. Of the 50 applications that received WAB scores indicating probable short-term tenure, 36 were actual short-term tenure employees. Thus, 72% of the predictions were correct ($p<.05$). The remaining 50 applications received scores indicating probable long-term tenure; 32 of the 50 were actual long-term employees for a successful prediction rate of 64% ($p<.05$). Hence, the WAB model appeared useful in the hiring process.

During the actual hiring period of the new hotel, more than 6,000 applicants were screened. Most applicants had to obtain a score of 3.0 on the WAB model to proceed to the next stage of the selection process. Approximately 50% of all applicants proceeded to the next stage; due to a shortage of applicants in certain job categories, some applicants with scores less than 3.0 proceeded to further stages in the selection process.

Additional screening was used in the selection process, including an honesty test and a computer-aided interview. Approximately 27% of all applicants were hired; the mean WAB score for all applicants was 2.92, with selected applicants averaging 3.30 and rejected applicants averaging 2.35.

Five months after the hotel opened, a random sample of 436 employees was studied. Although the population mean WAB score was 3.30 and the sample was randomly drawn, 56% of the sample had scored less than 3.0; 44% of the sample scored 3.0 or greater. This was due to the lack of high-scoring applicants for certain positions, such as housekeeper. Almost 70% of the low-scoring employees voluntarily terminated within 120 days of
service, while only 52% of the high-scoring employees terminated within 120 days (p<.05). In addition, WABs increased the speed of the screening and selection process. The hotel's personnel department screened 6,000 applicants in 60 days. Mitchell (1989) concluded that WABs were "...valuable additions to the hiring techniques of any hotel or restaurant that has access to the appropriate volume of data and will be hiring large numbers of people" (p. 60).

Although WABs are considered to be excellent predictors of employee performance and tenure, with validity coefficients ranging from .30 to .62 (Mumford & Owens, 1987), they require a minimum of 200 subjects (Mumford & Owens, 1987) for testing and are usually quite time-intensive and expensive to develop (Mumford & Owens, 1987; Reilly & Chao, 1982). The majority of hospitality operations, especially restaurant operations, are usually too small and geographically scattered to permit WAB development and use (J. Garcia, personal communication, September 16, 1991).

Jones and DeCotiis (1986) used elements of bio-data, along with techniques borrowed from assessment centers and structured interviews, to develop video-assisted selection. Video-assisted selection materials were developed for a large United States hotel company, with the goal of selecting customer service personnel such as waiter/waitress, desk clerk, or bellperson.

The first step in developing the video selection materials was the selection of a six-member advisory panel, consisting of a corporate vice-president, two general managers of hotel properties, the corporate director of human resources, the corporate director of rooms, and the
corporate food and beverage director. This panel provided technical input and helped coordinate support from participating hotel properties.

Critical incidents and job information were generated which led to the construction of a job analysis questionnaire based on the earlier compilation of skills and behaviors. This questionnaire was administered to a sample of 318 customer service employees; survey results indicated that the most important performance criterion for customer service jobs was customer relations.

A performance appraisal instrument was designed to rate employees' performance in customer relations. The scores resulting from the instrument was the dependent variable in the validation testing of the video selection materials.

The final step in video development was the actual scriptwriting and filming of the video materials. Each script described employee and customer behavior, followed by four possible reactions to the customer's behavior. These responses included an excellent response, good response, marginal response, and poor response.

The validation of the video selection materials consisted of four steps. Representative samples of customer service employees (size of samples and sampling procedure not specified) viewed the videos and chose one of the four responses offered with each scenario. Participating employees then received an overall score on the video test and were rated on their guest relations skills by their supervisors, who were unaware of the employees' scores on the video test. In the final step, video test
scores for the participants were correlated with the supervisory appraisal scores.

The results of the validation study supported the validity of the video selection process. Individual correlation coefficients between video test scores and supervisory ratings were significant (p<.05) for 11 of the 14 job categories studied. The range of significant coefficients included a high value of .71 for "recreation aide" to .16 for "luggage attendant." The overall correlation coefficient was .38 (p<.001).

Despite its promise, it must be noted that the video-assisted selection project cost over $150,000 and required 1,594 person-hours to develop and operationalize. The video test took 40-60 minutes for each applicant to complete.

Both WABs, as described by Mitchell (1989), and video-aided selection, as described by Jones and DeCotiis (1986), seemed to be promising methods of effective employee selection. Based on the statistical information provided, both methods were superior to random selection and compared favorably with selection studies in other industries, where validity coefficients of .25 to .35 were considered acceptable (Mumford & Owens, 1987; Gaugler, Rosenthal, Thornton, & Bentson, 1987). However, both methods required extensive developmental and validation efforts which may render them impractical for most restaurant operations. No restaurant/hotel examples of WAB use or video selection use have appeared in the literature since 1989, when the Mitchell (1989) article on WAB use was published.
Assessment centers

Assessment center methodology involves sending job applicants or candidates for promotion to a testing facility, where they are assessed by multiple raters using multiple methods. Candidates engage in exercises such as the In-Basket, where each candidate is given a stack of routine and nonroutine work to analyze, prioritize, and delegate or execute. Other exercises include the leaderless group discussion and interviews. Scores are assigned to each candidate for each exercise and a composite score which includes all of the individual exercise scores is computed (Gaugler et al., 1987).

Two hospitality-related examples of assessment center methodology were found in the literature. The first example was by Buchanan (1987), where the use of In-Basket exercises to help evaluate hospitality student learning was described. Buchanan asserted that the In-Basket exercise, which required problem-solving and decision-making skills, could be used to test for higher-level cognitive learning. Industry applications were not discussed by Buchanan.

An example of assessment center use in the hospitality industry was by Amundsen (1975) describing the experiences of Gino's, Inc. with assessment centers. Gino's was a large fast food company with 200 restaurants located in the eastern United States at the time of the study. Top management at Gino's selected the American Telephone and Telegraph (AT&T) model of assessment centers (Bray & Grant, 1966), and by 1975 they had held 22 sessions with 264 participants. Participants were unit managers being considered for promotion to area supervisor positions.
Each session featured 12 participants, plus 6 assessors, and lasted two and one-half days.

Participants engaged in work simulations, case study discussions, interviews, and In-Basket exercises. At the conclusion of the sessions, each participant was given extensive feedback on his/her performance. A detailed report was prepared for each participant; report results were used as an aid to making promotion decisions. No validation studies were conducted for the Gino's assessment centers, because of top management's belief that the extensive validation effort conducted by AT&T (Bray & Grant, 1966) had proven the effectiveness of the assessment center methodology.

Both Gino's top management and the participants surveyed expressed positive comments about the assessment centers, emphasizing that the process, with the extensive feedback given at session's end, was as important as the product. Gino's top management admitted that the sessions were quite expensive and averaged $500 per participant exclusive of participants' time.

Assessment centers might be useful in certain restaurant settings due to their strong validity coefficients and the extensive feedback given to participants (Gaugler et al., 1987; Amundsen, 1975). However, a major problem with assessment center use in restaurant settings is cost. Currently, most well-regarded assessment centers charge approximately $6,000 for a two-day session (Muchinsky, personal communication, April 1990). Most restaurant companies might find assessment centers too expensive for all but the highest level managers. A final note: Gino's,
Inc. is no longer using assessment centers. No other current examples of assessment center use in the restaurant industry could be found.

**Structured interviewing**

Structured interviewing methodology, described earlier, has been reported more frequently in the hospitality literature than either biodata or assessment centers. Lunn (1989) described the experience of Tetley & Son, Ltd. with structured interview formats. Tetley is a large holding company that owns and operates more than 500 pubs in Great Britain and typically prefers husband and wife management teams for pub operations.

Tetley hired Selection Research, Inc. (SRI) to develop structured interview guides to be used for selecting pub managers. The SRI materials identified "success characteristics" which were based on "life themes" and were defined as consistent, recurring patterns of thought, feeling, and behavior.

SRI consultants established four focus groups to help generate critical incidents, personal characteristics, and job skills needed to be successful pub managers. One group was made up of pub managers, a second group consisted of area managers, a third group consisted of corporate supervisors, and a fourth group was made up of personnel managers. In addition, 50 of the most successful pub managers were interviewed by SRI consultants.

The focus groups and interviews yielded 18 themes that were expected to predict managerial success. These themes included "critical thinking,"
"assertiveness," "stamina," and "customer orientation." SRI consultants then developed six interview questions for each of the 18 themes, along with scoring guides. Both Tetley and SRI regarded the rest of the developmental and validation phase of the project as proprietary and did not discuss these aspects in any detail.

Tetley then used the SRI-structured interview materials to select managers for its large chain of pubs. Lunn reported that SRI-selected managers performed better than conventionally selected managers; controllable profit in the pubs with SRI-selected managers grew 25% over the previous year as opposed to 5% for the conventionally selected manager pubs. Also, labor turnover in SRI-selected manager pubs dropped to 17% as opposed to 26% before the program.

A second example of structured interview use in the hospitality industry was the opening of the Mirage Hotel and Casino in Las Vegas, Nevada (Eder, 1990; Nathan, 1990). Prior to opening, Mr. Arte Nathan, director of human resources, and his staff attracted over 57,000 applicants for 6,500 positions (Nathan, 1990). Using a well-planned, rational selection process, the Mirage hired and later oriented and trained the 6,500 recruits.

One year later, the Mirage had retained 5,200 of the original 6,500 employees (80%) hired at opening. Only six legal challenges were entered from 50,500 nonselected applicants. Revenues, profit, and customer reaction during the first year were excellent (Nathan, personal communication, October 1990).
According to Nathan, all applicants were given extensive background and reference checks, going back 7 years on work experience. Approximately 50% of applicants were eliminated by the background check. Remaining applicants underwent brief screening interviews. During these interviews, the applicants were rated on three dimensions: attitude, appearance, and personality. A Likert-type rating scale was used, ranging from unacceptable (0) to outstanding (4).

All applicants who scored above a cut-off point were referred to department heads for a second interview. The second interview was a structured interview with BARS-type rating scales for each question. Questions and rating scales were developed by management teams and resulted in 10 open-ended, job relevant situational questions. Nathan and the Mirage regarded the developmental process as proprietary; many details of the development and use of the structured interviews could not be shared.

The many advantages of structured interview methodology were reviewed in the introduction and earlier review sections. Briefly, these advantages included high inter-rater reliability, strong validity, widespread acceptance by managers and applicants, and relatively low development costs. The examples described by Lunn (1989) and Nathan (1990) of successful hospitality industry use of structured interviews reinforce the utility and validity of the structured interview.
Surveys of hospitality industry selection

The results of a survey of hospitality industry use of selection methodologies, recruitment sources, and retention schemes was reported by Van Dyke and Strick (1988, 1990). Questionnaires were sent to the corporate personnel directors of the top 100 restaurant chains, as rated by Hospitality Business magazine, and questionnaires were sent to the corporate personnel directors of the top 100 lodging chains, as rated by Restaurants and Institutions magazine.

Van Dyke and Strick found that the most widely used selection device was "reference checks" (80%); the second most frequently used device was "internally developed checklists" (56%), and the third most popular was the London House Personnel Selection Inventory (11%) (1988). Another 9% used polygraphs, 7% used the Reid Honesty Test (1987), and 7% used the Stanton Survey (1987). Unfortunately, the list of selection methods listed in the questionnaire omitted some methods, such as interviews, biodata, and assessment centers. Another limitation of the study was the lack of a definition for the internally developed checklist.

Assuming that the restaurant industry research literature of the past 15 years reflects the industry as a whole, the following summary statements can be made:

1. Relatively little selection research has been reported.
2. Structured interviewing is the most widely used form of "scientific" selection.
3. Development of bio-data and assessment center methodologies is too expensive and time consuming for most restaurant operators.
4. Compared with nonrestaurant businesses, such scientific selection methodologies as bio-data, assessment centers, and structured interviewing seldom are used in the restaurant industry.

Summary of Review of Literature

The review focused on the two main types of structured interviews: the Situational Interview (Latham, 1989) and the Patterned Behavioral Description Interview (Janz et al., 1986). Based on studies by Latham and Wexley (1977), Latham and Saari (1984), Weekley and Gier (1987), and Robertson, Gratton, and Rout (1990), the situational interview appeared to have acceptable reliability and validity coefficients. The Patterned Behavioral Description Interview appeared to have acceptable validity coefficients (Janz, 1982; Janz, Hellervik, & Gilmore, 1986; Orpen, 1985), but relatively weak reliability (Janz, 1982, 1987).

Several reliability and validity issues were reviewed, including appropriateness of research settings, number and type of criterion measures, and escalation bias. Regarding research settings, field studies were more valid and generalizable to real world settings than artificial studies using "paper people" and undergraduate volunteers (Barr & Hitt, 1986; Gordon et al., 1986; McGovern et al., 1981). Researchers were admonished to use realistic settings and subjects whenever possible (Harris, 1989; Kacmar et al., 1989).

Criterion measures were examined. Most studies used supervisory ratings of employee performance as the criterion measure (Latham, 1989; Harris, 1989), but increasing attention was being given to additional
criteria such as turnover, absenteeism, sales, job satisfaction, and 
loyalty (Dreher et al., 1989; Harris, 1989).

Escalation bias, the systematic overrating of employees by 
supervisors who had personally selected those same employees, was 
reviewed. Escalation bias is almost inevitable in many field settings 
(Bazerman et al., 1982; Schoorman, 1988); fortunately, escalation bias 
appears to have little impact on the validity of selection decisions 
(Arvey et al., 1987).

Methodological issues were reviewed. Using identical questions in 
identical order improved the reliability and validity of interviews 
(Wiesner & Cronshaw, 1988). Use of behaviorally anchored rating scales 
appeared to be of questionable value (Murphy & Constans, 1987), while 
training of interviewers, in particular video-assisted training, improved 
the accuracy of ratings (Dougherty et al., 1986; Gist et al., 1989). 
Panel interviews appeared to be no more valid than individual interviews 
(Wiesner & Cronshaw, 1988).

Finally, the hospitality industry selection literature was reviewed. 
Although only seven industry-specific selection studies were found, the 
available literature seemed to indicate that scientific selection could be 
both valid and useful. Bio-data were shown to be valid and potentially 
useful but expensive to develop and use (Mitchell, 1989; Mumford & Owens, 
1987). Assessment centers were seldom used in the restaurant industry; 
despite its reputation for acceptable validity, the high cost of 
assessment centers may have limited its widespread use (Amundsen, 1975).
Structured interviewing appeared to be valid, useful, and cost effective in restaurant industry settings (Lunn, 1989; Nathan, 1990).

Based on restaurant industry needs, a valid selection methodology would be of great benefit to the restaurant industry. Improved selection in the restaurant industry should facilitate the hiring of better performing employees; the result should be lower turnover, happier customers, and increased profits for restaurant operators. Structured interviews seem to be the most appropriate methodology for selecting restaurant personnel. The present study developed and tested a structured interview procedure for selecting swing managers in fast food restaurants.
PROCEDURE

The purposes of the study were to develop a structured interview procedure for selection of fast food restaurant swing managers that would be valid, reliable, and usable, and to determine the personal, situational, and business characteristics that best predict swing manager performance. Instrument development and pilot testing were accomplished with the assistance of seven McDonald's restaurants in Iowa. Field testing was accomplished with the cooperation of the managers in 16 McDonald's restaurants in Wisconsin.

Structured Interview Guide Development

Structured interviewing was chosen as the primary procedure for swing manager selection in the study. This decision was based on a review of the industrial psychology and hospitality industry literature, input from the participating restaurant managers, and practical considerations of cost and appropriateness to the field setting.

A consistent theme in the interview literature was the importance of using carefully planned, job relevant questions, with a numerical rating scale accompanying each question (Latham, 1989; Harris, 1989). Some researchers advocated exhaustive job analyses as the source of both question items and rating scales (Robertson, Gratton, & Rout, 1990; Umbreit, 1987), while others favored use of job-expert advisory panels in question and rating scale development (Goodale, 1989). Extensive job analyses are both time consuming and expensive (Umbreit, 1987).
addition, such analyses require a high level of organizational commitment and openness to outside scrutiny of operations. Finally, recent studies showed little difference between the reliability and validity coefficients of such rigorously developed interview and rating guides and guides developed through other means such as advisory panels and review of literature (Wiesner & Cronshaw, 1988). For these reasons, a job-expert advisory panel was formed and used to develop selection criteria, interview questions, and rating guides.

The review of literature showed that use of videotaped training, especially video interviews, would improve the training of managers in using selection materials (Borg & Gall, 1989; Gist et al., 1989). Accordingly, the advisory panel was also used to help develop a training videotape.

Organizational structure of the pilot test corporation

The selection instrument was developed and pilot tested in Iowa with the cooperation of Dasher Management, Inc., a seven-unit McDonald's restaurant franchise based in Ames, Iowa. Dasher Management's organizational structure includes a president, director of operations, two area supervisors, and seven restaurant managers. Within each restaurant, the organizational structure includes a restaurant manager, first assistant manager, two second assistant managers, two to four shift managers, and four to twelve swing managers (Figure 1). Shift managers and swing managers were paid by the hour; all other managers were on salary.
The management position for which the interview guide was developed and tested is called the "swing manager" position in the Iowa McDonald's restaurants. Analogous to the lead cook, lead server, or bottom-level supervisor in other hospitality industry segments, the swing manager position is the first rung of the management ladder, often part-time, paid hourly, and usually filled by a 16- to 22-year-old employee (M. Rupiper, personal communication, April 10, 1990). All such positions are filled through internal promotions; the restaurant general manager makes the promotion decisions. Prior to the beginning of the present study, no formal procedures were used for filling these positions.
Advisory panel

The advisory panel for interview guide development consisted of three Iowa McDonald's restaurant managers and three Iowa area supervisors. This use of a small panel was similar to the Jones and DeCotiis (1986) study which used a small advisory panel to assist in developing video selection materials; Umbreit (1987) also used a small panel in developmental stages of a hotel manager performance evaluation form. In the present study, all panelists had been employed by the Dasher Management organization for at least four years. The managers and supervisors were recommended by the Dasher Management president as being extremely competent in their jobs and able to articulate their opinions about swing managers and managerial selections. Three of the six panelists were men, three were women.

To avoid the possibility of any one member dominating and influencing the other members of the advisory panel, and because it was virtually impossible to get the panelists to meet as a group, a procedure similar to that of the Delphi technique was followed (Huber, 1980). A written guide was developed to use in questioning each panel member on a one-to-one basis. The use of a written interview guide ensured that the same questions were asked of each panelist. Panelists were interviewed twice in the early phases of instrument development. The first series of interviews will be described as Initial Trait Identification and the second series, consisting of consolidating the traits identified earlier, will be called Reduced Trait Selection. The result of the Reduced Trait Selection interviews was a Final List of five characteristics.
Initial trait identification

Each panelist was interviewed individually, and interview meetings averaged 90 minutes in length. After informing each panelist of the background and purpose of the study, an interview guide (Appendix A) was used to determine (a) the characteristics that make a swing manager successful and (b) how those characteristics could be assessed prior to promotion.

Panelists were limited to five characteristics, based on studies by Gaugler and Thornton (1989) and Payne (1982). Accordingly, each panelist was asked to list and rank the five most important characteristics needed for success as a swing manager.

The initial round of interviews produced a list of 17 characteristics (Figure 2). One week after the initial interviews, the list of 17 characteristics was shown to each panelist individually. Panelists were asked to examine the list to (a) see if some characteristics were duplicates of others and could be eliminated, (b) see if any characteristics could be combined with other closely related characteristics, and (c) identify constraints: characteristics that had to exist for further consideration of the candidate.

Reduced trait selection

The consensus was that People Skills and Communication Skills could be combined, Internalize Corporate Concept and High Standards could be combined, and Decision Making/Problem Solving and Questioning/Creativity could be combined. Panelists also decided that Sacrifice of Personal
<table>
<thead>
<tr>
<th>Initial List (17 items)</th>
<th>Reduced List (11 items)</th>
<th>Final List (5 items)</th>
</tr>
</thead>
<tbody>
<tr>
<td>People Skills^)</td>
<td>People Skills/ Communication Skills</td>
<td>People Skills/ Communication Skills</td>
</tr>
<tr>
<td>Communication Skills^)</td>
<td>Internalize Corporate Concept/ High Standards</td>
<td>Internalize Corporate Concept/ High Standards</td>
</tr>
<tr>
<td>People Skills/ Communication Skills</td>
<td>Decision Making/Problem Solving/Questioning/Creativity</td>
<td>Decision Making/Problem Solving/Questioning/Creativity</td>
</tr>
<tr>
<td>Leadership</td>
<td>Leadership</td>
<td>Leadership</td>
</tr>
<tr>
<td>Work Level Quantity/Quality</td>
<td>Work Level Quantity/Quality</td>
<td>Work Level Quantity/Quality</td>
</tr>
<tr>
<td>Adaptability/Flexibility</td>
<td>Adaptability/Flexibility</td>
<td>Adaptability/Flexibility</td>
</tr>
<tr>
<td>Maturity/Common Sense</td>
<td>Maturity/Common Sense</td>
<td>Maturity/Common Sense</td>
</tr>
<tr>
<td>Ambition/Career Orientation^)</td>
<td>Ambition/Career Orientation/ Sacrifice</td>
<td>Ambition/Career Orientation/ Sacrifice</td>
</tr>
<tr>
<td>Sacrifice of Personal Needs^)</td>
<td>Customer Orientation</td>
<td>Customer Orientation</td>
</tr>
<tr>
<td>Customer Orientation</td>
<td>Teamwork</td>
<td>Teamwork</td>
</tr>
<tr>
<td>Teamwork</td>
<td>Upbeat/Optimistic</td>
<td>Upbeat/Optimistic</td>
</tr>
<tr>
<td>Availability^)</td>
<td>Experience at Work Stations^)</td>
<td>Experience at Work Stations^)</td>
</tr>
</tbody>
</table>

^) These items were combined into new items in the reduced list.
^) These items were regarded as constraints and, therefore, were eliminated.

Figure 2. Initial, reduced, and final lists of "success" characteristics sought in swing managers
Needs to needs of business was included in Ambition/Career Orientation so that Sacrifice could be eliminated as a characteristic (Figure 2).

Upon further reflection, panelists realized that Experience at Work Stations and Availability, while very important, would not be useful in a selection procedure. Candidates for swing manager openings had to have mastered all required work stations, and needed to be available for the appropriate shifts, before they could be considered for promotion. Thus, these two characteristics were constraints, and as such were eliminated from the list of swing manager characteristics. The result of the Reduced Trait interviews was a reduced list of 11 characteristics (Figure 2).

**Final trait selection**

The 11 characteristics derived from the initial trait identification interviews were listed in random order and presented to each panelist two weeks after the conclusion of initial trait identification interviews. During these meetings, each panelist was asked to choose the five most important characteristics from the list of 11 and rank the choices in order of importance.

In order to select the five success characteristics, each panelist was asked to help determine a point system which would be used to select the five success characteristics which would become the preliminary swing manager selection model. The panelists agreed to a system in which 6 points were assigned to top-ranked characteristics, 5 points to second-ranked characteristics, 4 points to third-ranked characteristics, 3 points to fourth-ranked characteristics, and 2 points to fifth-ranked
characteristics (Table 1). The rationale for the point distribution system was that the panel wanted the top-ranked characteristic to have three times the number of points as the fifth-ranked characteristic.

Each panelist's "top five" list of success characteristics then received the appropriate number of points for each ranked characteristic (Table 1). The points were totaled for each characteristic; the six lowest scoring characteristics were dropped from the list, and the five highest scoring characteristics were retained for use in the selection model (Figure 2).

Preliminary swing manager selection model

The point system was converted to a weighting system for use in the swing manager selection model. The "sum of digits" procedure was used, wherein the points were added (6+5+4+3+2=20) and the top-ranked characteristic received a weighting of 6/20=.30. The second-ranked characteristic received a weighting of 5/20=.25, the third-ranked characteristic received a weighting of 4/20=.20, the fourth-ranked characteristic received a weighting of 3/20=.15, and the fifth-ranked characteristic received a weighting of 2/20=.10. The preliminary swing manager selection model is shown in Figure 3.

Now that the preliminary swing manager selection model was developed, the next step was to develop assessment criteria for the model. These criteria would be used to measure the extent to which swing manager candidates possessed the success characteristics and to assign scores for each characteristic in the model.
Table 1. Frequency and point totals for the swing manager success characteristics

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>1st</th>
<th>2nd</th>
<th>3rd</th>
<th>4th</th>
<th>5th</th>
<th>Point totals&lt;sup&gt;a&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>People Skills/Communication Skills</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>23</td>
</tr>
<tr>
<td>Internalize</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>18</td>
</tr>
<tr>
<td>Corporate Concept/High Standards</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision Making/Problem Solving/Questioning/Creativity</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>16</td>
</tr>
<tr>
<td>Leadership</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>13</td>
</tr>
<tr>
<td>Work Level</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantity/Quality</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td>Adaptability/Flexibility</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>Maturity/Common Sense</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>Ambition/Career Orientation/Sacrifice</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Customer Orientation</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>Teamwork</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Upbeat/Optimistic</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Column totals</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

<sup>a</sup>Point calculation as follows: 1st rank = 6 points, 2nd rank = 5 points, 3rd rank = 4 points, 4th rank = 3 points, 5th rank = 2 points. One vote for 1st rank = 1 x 6 = 6 points.
Selection score = 0.30 x (PSCS)
+ 0.25 x (ICHS)
+ 0.20 x (DMPS)
+ 0.15 x (LS)
+ 0.10 x (WLQQ)

PSCS = People Skills/Communication Skills Score
ICHS = Internalize Corporate Concept/High Standards Score
DMPS = Decision Making/Problem Solving Score
LS = Leadership Skills Score
WLQQ = Work Level Quantity/Quality Score

Figure 3. Swing Manager Selection Guide (SMSG) equation

Identification of assessment methods for the selection model

In order to assign numerical scores to the preliminary selection model, assessment criteria had to be identified. To help achieve this goal, existing documents used by the Iowa McDonald's franchise group were obtained, including crew performance review forms, swing manager evaluation forms, training materials, interview materials, and policy manuals.

A series of meetings was initiated in which the existing McDonald's documents and the list of five success characteristics were reviewed by each panelist. Each meeting lasted approximately 90 minutes; all six meetings were accomplished in a three-week time period.

During each meeting, panelists were asked to examine the five success characteristics and review the existing McDonald's performance reviews and
training materials. Each panelist was asked to select criteria that could be used to assess the swing manager candidates prior to promotion. Based on the input from the panelists, as well as concerns for practicality and economy, appropriate items from the candidates' most recent crew performance review were to be used to assess the Internalize McDonald's Concept/High Standards and Work Level Quantity and Quality characteristics (Figure 4). In addition, the Leadership and People Skills/Communication Skills characteristics would be partially assessed with items from the crew performance review (Figure 4).

When asked about possible means of assessing the People Skills/Communication Skills, Decision Making/Problem Solving/Creativity, and Leadership characteristics, the consensus was to use specific questions in an interview. Based on the review of literature and this input from the panelists, structured interview questions were selected as the primary means of assessing three traits: the People Skills/Communication Skills/Decision Making/Problem Solving/Creativity, and Leadership characteristics.

Development of interview questions

In June 1990, two weeks after the conclusion of the trait identification meetings, each panelist was telephoned to schedule meetings and asked to think about critical incidents that related to the People Skills/Communication Skills, Decision Making/Problem Solving/Creativity, and Leadership characteristics of the model. Panelists were encouraged to describe as many incidents as they wished.
<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Crew performance review item</th>
</tr>
</thead>
<tbody>
<tr>
<td>People Skills/Communication Skills</td>
<td>1. Is friendly and courteous to customers and fellow employees.</td>
</tr>
<tr>
<td>Internalize Corporate Concepts</td>
<td>1. Follows procedures in preparing all products according to McDonald's standards.</td>
</tr>
<tr>
<td></td>
<td>2. Maintains speed and quality of counter and/or drive-thru service according to McDonald's standards.</td>
</tr>
<tr>
<td></td>
<td>3. Maintains QSC standards and enforces holding times.</td>
</tr>
<tr>
<td></td>
<td>4. Hustles during rushes and helps out others when needed.</td>
</tr>
<tr>
<td></td>
<td>5. Follows practice of clean-as-you-go.</td>
</tr>
<tr>
<td></td>
<td>6. Works as a team member.</td>
</tr>
<tr>
<td></td>
<td>7. Wears a complete, neat, and clean uniform.</td>
</tr>
<tr>
<td></td>
<td>8. Displays good personal hygiene.</td>
</tr>
<tr>
<td>Leadership</td>
<td>1. Stays busy without direct supervision.</td>
</tr>
<tr>
<td>Work Level Quantity/Quality</td>
<td>1. Follows procedures in preparing all products according to McDonald's standards.</td>
</tr>
<tr>
<td></td>
<td>2. Maintains speed and quality of counter and/or drive-thru service according to McDonald's standards.</td>
</tr>
<tr>
<td></td>
<td>3. Maintains QSC standards and enforces holding times.</td>
</tr>
<tr>
<td></td>
<td>4. Hustles during rushes and helps out others when needed.</td>
</tr>
</tbody>
</table>

Figure 4. Crew performance review items used in the preliminary swing manager selection instrument
In a one-hour individual meeting, each panelist was asked to list several critical incidents for each of the three characteristics in question. Clarification of incidents was sought as needed. Finally, the incidents were read back to each panelist for verification of meaning. A total of 21 separate critical incidents were generated, 7 for People Skills/Communication Skills, 8 for Decision Making/Problem Solving/Creativity, and 6 for Leadership.

The critical incidents were converted into situational questions, and the entire panel reacted to the incidents in a two-hour group meeting. The panel reviewed the questions, discussed them, and eliminated eight items by unanimous voice vote. At this point, 14 questions remained, 5 for People Skills/Communication Skills, 5 for Decision Making/Problem Solving/Creativity, and 4 for Leadership. The panel then debated the appropriate number of questions for each characteristic. Following 45 minutes of debate, a vote was requested. One of the panelists countered with a request that two questions be used to assess each characteristic. All six panelists agreed that this seemed to be an acceptable compromise and would facilitate the assessment of the characteristics. Therefore, two questions were used for each of the characteristics.

The final activity at this group meeting was to select two questions for each characteristic. Each panelist was asked to select and write down two questions for each characteristic and rank them first and second. Two points would be awarded for first place votes and one point for second place votes. The results were tallied and the two questions that received
the most points were selected to assess each characteristic (Appendix D, interview questions).

Based on prior review of literature and the evaluation materials used at McDonald's, a simple five-point Likert-type rating scale for each interview question was used. A rating of 1 on the scale corresponded with outstanding, 2 with excellent, 3 with good, 4 with needs improvement, and 5 with unsatisfactory. This type of scale was identical to the scale used by McDonald's managers in most performance evaluations. Use of this type of scale, as opposed to behaviorally anchored rating scales (BARS), also precluded problems with rating bias associated with BARS (Murphy & Constans, 1987; Piowtrowski, Barnes-Farrell, & Esrig, 1989). When asked to comment on rating scales at the group meeting, panelists expressed confidence in the accuracy of their judgments made with the existing five-point scale. In addition, they preferred to stay with a familiar rating system rather than learn a new system.

At the conclusion of the meeting, arrangements were made to identify 16 hourly workers for reviewing the instrument, and 12 current swing managers for initial pilot testing of the instrument. The hourly workers and swing managers were to be identified from the three stores managed by panelists.

**Final development and review of instrument**

Final instrument development procedures involved writing an introduction, instructions, interview guide, and scoring sheet, as well as layout and graphics work to make the instrument as readable as possible.
The instrument was then reviewed by 16 current hourly employees organized in small groups. These employees, who had been selected by their store managers, were asked to examine the interview questions for clarity and relevance to the workplace. Minor revisions were suggested in the wording of two questions.

The first item revised was an interview question in the People Skills/Communication Skills section of the instrument:

**Original:** Tell me about two or three situations where you had to deal with *customer complaints*. How did you know they were upset? How did you handle them?

**Revised:** Tell me about two or three situations where you had to deal with *unhappy customers*. How did you know they were unhappy? How did you handle them?

The second item revised was an interview question in the Decision Making/Problem Solving/Creativity section of the instrument:

**Original:** Tell me about some problem situations you’ve encountered on the job. How did you handle them? Would you handle them the same way again?

**Revised:** Tell me about some problem situations other than unhappy *customers* you’ve encountered on the job. How did you handle them? Would you handle them the same way again?

Each advisory panelist was then contacted to set up a brief meeting where he/she was asked to review the instrument, including the introduction, instructions, questions, layout, and scoring sheet. The panelists expressed their satisfaction with the instrument. The
instrument was now judged to be ready for pilot testing and was named Swing Manager Selection Guide (SMSG); the complete SMSG is included in Appendix D.

The SMSG as developed, consisted of the five "success characteristics" with subscores for each. The People Skills/Communication Skills characteristic included four subscores, which were then averaged to yield an overall score for the characteristic (Appendix D, scoring guide). This overall score was entered into the SMSG model as the People Skills/Communication Skills score.

An identical scoring procedure was followed for each of the SMSG characteristics. The Internalize Corporate Concept/High Standards characteristic included eight subscores, Decision Making/Problem Solving/Creativity included two subscores, Leadership included three subscores, and Work Level Quantity/Quality included four subscores (Appendix D, scoring guide). In each case, the subscores were averaged to yield an overall mean score for each characteristic, and then these characteristic scores were entered into the SMSG model.

Pilot Tests

A preliminary pilot test was performed to investigate the discriminatory power of the SMSG. In this preliminary pilot test, 12 current swing managers were evaluated using the SMSG. These swing managers were selected by the unit managers of three stores. Each of the unit managers selected two high-performing swing managers and two low-performing swing managers from his/her store. The unit manager then used
the SMSG to interview and rate each swing manager. The numerical rating score for each SMSG item was entered into the selection model and an overall SMSG score was calculated.

Pearson correlation coefficients were calculated between SMSG scores and the most recent Performance Review of Swing Managers (PRSM) scores for the 12 swing managers. A correlation coefficient of .70 resulted (p<.05); 49% of the variance in the PRSMs was accounted for by the SMSG score. Although the correlation was .70, it may be inflated due to the small sample size in the preliminary pilot test.

The relatively high correlation coefficient for the first pilot test, plus strong qualitative feedback from the swing managers and unit managers, indicated that the selection packet held promise as a means of promoting the best possible candidates to swing manager positions.

A second, more representative pilot test of the SMSG was conducted in the seven Iowa McDonald's restaurants from April through July 1990. The second test, which consisted of using the SMSG to evaluate actual swing manager candidates, had four goals:

1. Obtain biographical data on the candidates for use in future field test data collection and analysis.
2. Obtain feedback from restaurant managers on the SMSG instrument for use in revising the SMSG.
3. Compare SMSG scores for promoted swing manager candidates with those of swing manager candidates who were not promoted. Evidence of the discriminatory power of the SMSG was sought.
4. Estimate the alpha reliability of the SMSG.
Care was taken to protect the identity of all participants in the study, and to avoid any negative consequences of participation in the study. Both the SMSG and the research design were approved by the University Human Subjects Review Committee.

Seven McDonald's restaurants in central Iowa participated in the second pilot test from June through August 1990. The managers of each restaurant were trained in the use of the SMSG and asked to use the SMSG to evaluate candidates for actual swing manager openings. In addition to collecting SMSG scores, qualitative data were collected from the restaurant managers.

Procedure

Participating restaurant managers were contacted by telephone every two weeks, and the managers were asked if they anticipated any swing manager openings in the near future. If the managers did expect openings, they were asked to specify a date when the SMSG would be used to evaluate candidates. These managers were then contacted on the appropriate dates and raw SMSG scores were collected, entered into the SMSG model, and total SMSG scores were calculated. In many instances, several calls were needed to encourage specific managers to use the SMSG. The result of this frequent contact with managers was that SMSG scores were always given to managers as an aid to the promotion decision, prior to the actual decision point.

Data analyses included frequency counts and descriptive analysis for demographic and SMSG variables. SMSG scores were calculated for all
candidates, and promoted candidates' scores were compared with those of nonpromoted candidates using the t-test for independent means. Finally, the alpha reliability of the SMSG was calculated.

Findings
A total of 21 candidates for swing manager openings were evaluated; 14 of the 21 were promoted in the pilot test. Candidates were likely to be women, 18 to 25 years old, and still in high school or college (Table 2). Most of the candidates had little or no involvement in school-related activities, and most had held at least one job prior to working for McDonald's.

The mean SMSG score for all candidates was 2.21. Comparing the mean SMSG scores of promoted candidates with those of nonpromoted candidates, promoted candidates received a mean score of 1.58, versus 2.82 for nonpromoted candidates (low scores indicate better performance than high scores). The difference in SMSG scores was statistically significant (t=-4.82; p<.001), and indicated that the SMSG had potential to discriminate between levels of performance.

The reliability coefficient of the instrument was .97, indicating high reliability. However, this high coefficient may be inflated due to small sample size.

Qualitative feedback indicated that the SMSG was promising. The consensus was that the SMSG was perceived as fair by swing manager candidates and restaurant managers. In addition, the SMSG enabled the restaurant managers to give nonpromoted candidates constructive input,
<table>
<thead>
<tr>
<th>Characteristic</th>
<th>n</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>6</td>
<td>28.6</td>
</tr>
<tr>
<td>Female</td>
<td>15</td>
<td>71.4</td>
</tr>
<tr>
<td>Age in years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-17.9</td>
<td>4</td>
<td>19.0</td>
</tr>
<tr>
<td>18-19.9</td>
<td>6</td>
<td>28.6</td>
</tr>
<tr>
<td>20-24.9</td>
<td>7</td>
<td>33.3</td>
</tr>
<tr>
<td>&gt;25</td>
<td>4</td>
<td>19.0</td>
</tr>
<tr>
<td>Student</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>14</td>
<td>66.7</td>
</tr>
<tr>
<td>No</td>
<td>7</td>
<td>33.3</td>
</tr>
<tr>
<td>Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>19</td>
<td>90.5</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>&gt;2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education level</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th/11th</td>
<td>12</td>
<td>57.1</td>
</tr>
<tr>
<td>12th/beyond</td>
<td>9</td>
<td>42.9</td>
</tr>
<tr>
<td>Work experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0 previous jobs</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>1 previous job</td>
<td>12</td>
<td>57.1</td>
</tr>
<tr>
<td>2 previous jobs</td>
<td>5</td>
<td>23.8</td>
</tr>
<tr>
<td>&gt;2 previous jobs</td>
<td>3</td>
<td>14.3</td>
</tr>
<tr>
<td>Race</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caucasian</td>
<td>17</td>
<td>81.0</td>
</tr>
<tr>
<td>Black</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>Hispanic</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>9.5</td>
</tr>
</tbody>
</table>
which might help the nonpromoted candidates improve. Perhaps most important of all, managers regarded the SMSG as relatively simple to use and requiring little time to administer (approximately 30-40 minutes on average).

No revisions were suggested by the participating managers. Based on the results of the two pilot tests, the SMSG was judged suitable for field testing with a larger sample.

Field Test

To provide convincing evidence of the validity and usability of the SMSG, a larger field test was needed. Accordingly, a 16-unit McDonald's franchisee, Courtesy Corporation of LaCrosse, Wisconsin, was contacted and agreed to participate in the study. Courtesy Corporation's organizational structure includes a president, a director of operations, four area supervisors, and 16 restaurant managers. In addition, Courtesy Corporation employs a full-time marketing manager, personnel manager, and bookkeeper, plus three office staff persons. Within each restaurant, the organizational structure includes a restaurant manager, first assistant manager, one or two second assistant managers, three to six shift managers, and three to eight swing managers (Figure 5). Swing managers and shift managers were paid by the hour; all other managers were on salary.

Turnover of swing managers approached 100% per year in the Wisconsin McDonald's. With 16 restaurants participating, and a mean of five swing managers per restaurant, there was the potential for as many as 60 to 80
swing manager promotion decisions during the 12 months of the field test (August 1990 through July 1991).

Due to the large number of restaurant managers participating in the field test, inter-rater reliability presented a potential problem. Thorough training in the use of the SMSG became an important consideration, as well as providing evidence of the inter-rater reliability of the SMSG as used by 16 managers.

A second concern was the fact that the field test setting and franchise group were different from the pilot test setting and franchise group. As a result, the SMSG as developed in Iowa would need to be reviewed and possibly revised before use in Wisconsin.
Field test instrument

The original Swing Manager Selection Guide (SMSG) was developed in Iowa with Dasher Management. Due to several differences in crew member performance review forms (Appendices B and C), slight modifications had to be made to the SMSG. These modifications were made in July 1990 during a meeting with the director of operations, director of personnel, and three area supervisors of Courtesy Corporation of Wisconsin.

No changes were made to the interview questions of the SMSG; however, several substitutions were made relative to the Internalize Corporate Concept/High Standards and Work Level Quantity/Quality characteristics. In addition, the People Skills/Communication Skills and Leadership characteristics, which were assessed by a combination of interview questions and crew performance review items, received limited substitutions. Figure 6 lists the differences in the crew performance review items which were used in the Iowa and Wisconsin SMSGs. The final field test version of the SMSG was changed to reflect these differences in crew performance review items (Appendix C).

Other than these changes, the five individuals of Courtesy Corporation expressed their satisfaction with the SMSG packet. The introduction, instructions, and interview questions were the same for both the Iowa and Wisconsin SMSG. In addition, the same Five-factor Selection Model with identical weightings was retained.
<table>
<thead>
<tr>
<th>Item</th>
<th>Iowa SMSG</th>
<th>Wisconsin SMSG</th>
</tr>
</thead>
<tbody>
<tr>
<td>People Skills/Communication Skills</td>
<td>Item I, &quot;Friendly and courteous to customers and employees,&quot; from most recent crew performance review, plus two interview questions.</td>
<td>Item B, &quot;Attitude,&quot; from most recent crew performance review, plus two interview questions.</td>
</tr>
<tr>
<td>Problem Solving/Decision Making/Creativity</td>
<td>Two interview questions.</td>
<td>Two interview questions.</td>
</tr>
</tbody>
</table>

Figure 6. Comparison of Wisconsin and Iowa Swing Manager Selection Guide (SMSG) formats
SMSC training for field test managers

Training of the 16 restaurant managers was a three-stage process. First, a videotape was produced as an aid to training and as a check on the inter-rater reliability of the SMSG. Following the video development, Courtesy Corporation managers were trained in groups, with the videotapes the centerpiece of the training. The final stage of the training process consisted of individual meetings with the restaurant managers.

Videotape development The review of literature indicated that use of videotaped interviews for training prospective interviewers would improve inter-rater reliability and validity of interviewer judgments (Borg & Gall, 1989; Gist et al., 1989). Accordingly, upon the completion of the pilot test stage of the study in July 1990, a training video consisting of mock interviews was developed for use in the field test. The purposes of the videotape were twofold: the first objective was to help train Wisconsin area restaurant managers in the use of the SMSG, and the second objective was to increase inter-rater reliability between users of the SMSG.

A script was prepared based on a mock interview which used three of the six SMSG interview questions. Answers to the questions were scripted to be as realistic as possible, with a preferred and a less-preferred answer for each question. The order of the answers was varied so that no consistent pattern of preferred and less-preferred responses was evident (Appendix F).

Three members of the original Iowa advisory panel provided extensive input into script development and editing of the video. The three area
supervisors participated in the video development. Each area supervisor reviewed the scripts individually; one week later the three area supervisors met for about two hours. The three area supervisors discussed the scripts and several changes were made. Most of these changes were intended to (a) enhance the realism of the responses by making the answers more "McDonald's specific" and (b) reduce the "goodness" of the preferred responses and the "badness" of the less-preferred responses. Consensus was reached on the script and filming was scheduled.

Two 21-year-old students, one male and one female, were selected to portray the interviewees. The part of the interviewer was portrayed by a 34-year-old graduate student with extensive restaurant management experience. The two students acting as interviewees were encouraged to try to appear spontaneous in the videotape. Spontaneity meant that the scripts were not read verbatim. A small amount of variation occurred because the students could not read the scripts on camera and because the students appeared "wooden" when they actually memorized passages word for word.

Following the initial taping, the area supervisors reviewed the videotape. At this point, the videotape was approximately 42 minutes in length. The reviewers suggested several edits that would reduce the length of the video, due to their belief that the typical restaurant manager would not watch a 42-minute tape.

As a result of the reviewers' input, the videotape was edited by reducing the number of examples contained in the mock interview responses. For example, the first question asked of the interviewee was "Tell me
about two or three people you work with at McDonald's whom you had to interact with 'differently'..." (Appendix F). In the original video, the students used three examples of "different" people in the good and bad responses. The script was reduced to one example in the final videotape, thus shortening the length by 9 minutes for a total running time of 33 minutes. This reduction was perceived as significant and satisfactory by the review panel.

Following two weeks of editing, the training videotape was shown to the area supervisors. All three judged that the edited version was appropriate for training managers in the use of the SMSG.

**Training sessions** Training of restaurant managers was a two-part process. In the first part, the SMSG was reviewed in group meetings with the 16 Wisconsin restaurant managers. Following some discussion and a question and answer session, the restaurant managers were asked to view the video interviews and score the responses using the actual SMSG. The videotape was stopped after each response to allow time for scoring.

After viewing the videotape, each manager was asked to read his/her ratings for each response to the questions aloud and explain his/her reasoning for the various ratings. The managers showed strong agreement in their rating of responses; later analysis yielded a reliability coefficient of .79 for inter-rater agreement, confirming this initial impression. Due to small sample size, the high value for the reliability coefficient may be inflated.

Following the video training sessions, each manager was visited in his/her restaurant for further training in the use of the SMSG. During
these 60- to 90-minute sessions, the managers were asked to explain the SMSG packet, including the scoring system. As one part of the session, the managers were asked to rate a fictitious swing manager candidate. This verified their understanding of the use of the SMSG in evaluating swing manager candidates. At the conclusion of the individual training sessions, each of the managers appeared confident in using the SMSG.

Field test data collection

Field test data were collected from September 1, 1990 to August 1, 1991. Applicants for swing manager positions were evaluated by the restaurant general managers; the managers used the SMSG in the evaluations, and promising candidates were promoted.

After 90 days as a swing manager, the promoted candidate received a Performance Review of Swing Managers (PRSM). The PRSM form was an existing document used by Courtesy Corporation; swing managers were evaluated in five areas and received a numerical score for each area, as well as an overall average score. A Likert-type scale was used with 1 equal to outstanding and 5 equal to unsatisfactory (Appendix G).

In addition to collecting PRSM scores for SMSG-promoted candidates, PRSM scores were collected for swing managers who had been promoted without the use of the SMSG. All of these non-SMSG swing managers had been promoted prior to the beginning of the field test. The purpose of collecting non-SMSG swing managers' PRSM scores was to compare their performance with that of the SMSG-selected swing managers.
Biographical information was obtained from the application blanks of SMSG-evaluated swing manager candidates (Appendix I). This information, including such data as age, gender, education level, extracurricular activities, and work experience, was provided by the Wisconsin McDonald's franchise group at the conclusion of the field test period.

Qualitative data were also collected throughout the field test. Input from managers, such as perceptions of time requirements for using the SMSG, perceived fairness of the SMSG, and ease of administering the SMSG, was sought.

The 12-month test proceeded as follows:

1. Unit managers posted announcement of swing manager openings as they occurred. All interested personnel were invited to apply.
2. All interested applicants were interviewed and evaluated with the SMSG packet. The SMSG yielded numerical scores for each selection model characteristic.
3. An overall model score for each applicant was calculated. These scores were shared with the unit manager in question, who used the selection model score as an aid in the promotion decision.
4. Some of the applicants were promoted.
5. As the promoted swing managers completed 90 days of service in position, each one received a Performance Review of Swing Managers (PRSM). These review scores were obtained for statistical analyses.
6. Biographical data were collected for all candidates. In addition, PRSM scores were obtained for a sample of swing managers who had been promoted without the use of the SMSG.

During the data collection process, three visits were made to each of the participating stores during the 12-month period. The primary goal of these visits was to keep restaurant managers committed to the study; in addition, data were collected during the visits. Data also were collected via telephone interviews. Managers were phoned every two weeks and asked about impending swing manager promotions. The primary reason for the frequent telephone calls was to keep managers committed to the study; however, data collection and calculation of SMSG scores also were performed during the calls. As was the case with the pilot study, more frequent phone calls were often needed to compute and collect SMSG scores so that managers could use the SMSG scores to make promotion decisions in a timely manner.

Field test sample

Data collection efforts resulted in 49 swing manager candidates evaluated with the SMSG. A total of 36 candidates were promoted, and 13 were not promoted. Due to normal employee turnover, 5 of the 36 promoted candidates quit prior to receiving a PRSM, leaving a total of 31 SMSG-selected swing managers who received SMSG scores and PRSM scores.

Complete biographical data were collected on 27 of the 31 SMSG-selected swing managers and 12 of the 13 swing manager candidates who were
not promoted. A total of 27 complete data sets, complete with SMSG scores, PRSM scores, and biographical data, were collected.

Collection of PRSM data for swing managers who had been promoted without the use of the SMSG resulted in 22 cases. Biographical data were not collected for this sample because these managers were promoted prior to the initiation of this study.

Data Analysis

The field test and demographic data were analyzed using SPSS, the Statistical Package for the Social Sciences (SPSS Reference Guide, 1990). Descriptive statistics such as frequency counts, means, and variances were computed using the frequencies programs of SPSS. Items analyzed at this stage included Swing Manager Selection Guide (SMSG) scores, Performance Review of Swing Managers (PRSM) scores, and application blank data such as education levels and previous work experience.

T-tests

Following the computation and inspection of the descriptive statistics, t-test analyses (t-test for independent means) were performed. Mean SMSG scores of promoted swing manager candidates were compared with those of nonpromoted candidates. In addition, mean PRSM scores of SMSG-selected swing managers were compared with those of swing managers promoted by procedures other than the SMSG.
Correlation matrix and cluster analysis

The field test SMSG instrument included 12 items with a numerical score for each. As a necessary prelude to generating prediction equations for swing managers, the 12 SMSG items had to be reduced or combined into fewer factors.

Due to small sample size, factor analysis was not feasible. Cluster analysis was selected for use in reducing the set of 12 SMSG items into a few factors. These new factors could then be entered into multiple regression analyses, with the goal of developing prediction equations for use in selecting swing managers.

A 12 by 12 Pearson correlation matrix was computed and inspected to determine sets (factors) of highly intercorrelated items. These new SMSG factors were examined for logical connections. In addition, alpha reliabilities were calculated for each new factor using Cronbach's alpha. The factors that met the criteria of intercorrelated items, consistency of content, and acceptable reliability coefficients were retained.

Multiple regression analyses

In an effort to develop prediction equations for use in the selection of swing managers, SMSG factors and biographical variables were entered into multiple regression analyses using the 27 complete data sets. The first analysis used all six relevant biographical variables and all of the newly created SMSG factors.

Those variables from the first equation with the highest beta-weights were then entered into a second multiple regression analysis. The goal in
generating a second equation was to optimize prediction yet reduce the number of predictor variables.

As an aid in revising the SMSG and achieving good predictive power with the fewest variables, a third multiple regression analysis was performed. In this case, the most promising variables from the second equation were used to develop this third equation.

Validity coefficients

Three validity coefficients were calculated. The first calculation correlated mean SMSG scores with PRSM scores. The 12 item scores of the SMSG were averaged to yield an overall SMSG score for each candidate. These overall scores were then correlated with the candidate’s mean PRSM scores.

The second validity coefficient correlated the selection scores derived from the second regression equation with the mean PRSM scores. An identical procedure was followed in calculating the third correlation coefficient, i.e., selection scores derived from the third regression equation were correlated with the PRSM scores.
FINDINGS AND DISCUSSION

This chapter describes the results of the field test research. The first part of the findings reported will be descriptive statistics for the field test sample, followed by comparisons of promoted versus nonpromoted candidates and Swing Manager Selection Guide (SMSG)-selected versus non-SMSG-selected swing managers. The results of the cluster analysis of the SMSG will then be reported, followed by the results of multiple regression analyses. The final set of findings reported consists of the validity coefficients describing the correlation between selection model scores and later performance as swing managers. Discussion of findings will accompany the reporting of all findings.

Description of the Field Test Sample

A total of 49 swing manager candidates were evaluated with the Swing Manager Selection Guide (SMSG). Of the 49 candidates, 36 were promoted (73.5%) and 13 were not promoted (26.5%). Five of the 36 swing managers selected via the SMSG voluntarily terminated prior to 90 days in the swing manager position; no biographical or Performance Review of Swing Managers (PRSM) data were obtained for these five.

The typical swing manager candidate was female, 21.9 years old, Caucasian, and still in school. In addition, the typical candidate was moderately involved in school-related extracurricular activities and had held at least one job prior to working for McDonald's (Table 3).
Table 3. Demographics of the field test sample

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Total candidate pool (n=49)</th>
<th>Promoted candidates&lt;sup&gt;a&lt;/sup&gt; (n=31)</th>
<th>Nonpromoted candidates (n=13)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>Percentage</td>
<td>n</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>19</td>
<td>38.8</td>
<td>13</td>
</tr>
<tr>
<td>Female</td>
<td>30</td>
<td>61.2</td>
<td>18</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-17.9</td>
<td>29</td>
<td>61.7</td>
<td>18</td>
</tr>
<tr>
<td>18-19.9</td>
<td>7</td>
<td>14.9</td>
<td>6</td>
</tr>
<tr>
<td>20-24.9</td>
<td>2</td>
<td>4.3</td>
<td>0</td>
</tr>
<tr>
<td>&gt;25</td>
<td>9</td>
<td>19.1</td>
<td>7</td>
</tr>
<tr>
<td>Missing</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Student</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>31</td>
<td>67.4</td>
<td>20</td>
</tr>
<tr>
<td>No</td>
<td>15</td>
<td>32.6</td>
<td>10</td>
</tr>
<tr>
<td>Missing</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Education level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th/11th</td>
<td>33</td>
<td>75.0</td>
<td>21</td>
</tr>
<tr>
<td>12th/beyond</td>
<td>11</td>
<td>25.0</td>
<td>7</td>
</tr>
<tr>
<td>Missing</td>
<td>5</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>19</td>
<td>44.2</td>
<td>12</td>
</tr>
<tr>
<td>1</td>
<td>14</td>
<td>32.6</td>
<td>9</td>
</tr>
<tr>
<td>2</td>
<td>5</td>
<td>11.6</td>
<td>3</td>
</tr>
<tr>
<td>&gt;2</td>
<td>5</td>
<td>11.6</td>
<td>3</td>
</tr>
<tr>
<td>Missing</td>
<td>6</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Job number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>8</td>
<td>18.6</td>
<td>4</td>
</tr>
<tr>
<td>1</td>
<td>12</td>
<td>27.9</td>
<td>9</td>
</tr>
<tr>
<td>2</td>
<td>23</td>
<td>53.5</td>
<td>14</td>
</tr>
<tr>
<td>Missing</td>
<td>6</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Race</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caucasian</td>
<td>46</td>
<td>93.9</td>
<td>29</td>
</tr>
<tr>
<td>Black</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Hispanic</td>
<td>1</td>
<td>2.0</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>4.1</td>
<td>1</td>
</tr>
</tbody>
</table>

<sup>a</sup>Five of the 36 SMSG-promoted swing managers terminated prior to 90 days in position. Thus, the n for promoted candidates is 31.
The profile for promoted swing manager candidates was quite similar to that of the total candidate pool. As can be seen in Table 3, the typical promoted candidate was also young, Caucasian, female, and still in school. Promoted candidates also were involved moderately in school-related activities; the most common activities were band and sports (10 of the 15 who participated, or 67%).

Nonpromoted candidates were younger than promoted candidates; 83.3% of nonpromoted candidates were 16 to 17.9 years of age, versus 58.1% of promoted candidates (Table 3). In addition, 91.7% of nonpromoted candidates were in 10th or 11th grade, as opposed to 75% of promoted candidates.

The field test sample appeared representative of the population of Courtesy Corporation McDonald's employees. According to Courtesy Corporation records, the majority of the Courtesy Corporation employees were 16- to 18-year-old Caucasian women. Although no data were available on school status, extracurricular activities, and previous work experience, the corporate personnel manager stated that most Courtesy Corporation employees were students with limited prior work experience (Anne Willford, personal communication, May, 1991). She was unsure of the typical participation level in extracurricular activities.

Field Test Group Comparisons

Mean Swing Manager Selection Guide (SMSG) scores of promoted candidates were significantly different from those of nonpromoted candidates (Table 4). Promoted candidates received lower scores than
Table 4. Swing Manager Selection Guide (SMSG) scores of promoted versus nonpromoted candidates (n=49)

<table>
<thead>
<tr>
<th>Group</th>
<th>n</th>
<th>Mean</th>
<th>S.D.</th>
<th>t-value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promoted candidates</td>
<td>36</td>
<td>2.14</td>
<td>.36</td>
<td>-4.26***</td>
</tr>
<tr>
<td>Nonpromoted candidates</td>
<td>13</td>
<td>2.56</td>
<td>.28</td>
<td></td>
</tr>
</tbody>
</table>

***p<.001.

nonpromoted candidates; low scores predicted better performance whereas high scores predicted poorer performance.

The primary goal of a selection instrument is to discriminate between levels of performance, i.e., promising candidates should receive better scores than less-promising candidates (American Psychological Association, 1985). The present study fulfilled this goal. During the field test of the SMSG, scores of promoted candidates were found to be lower and significantly different from those of nonpromoted candidates. This suggested that the SMSG had potential for discriminating between candidates and corroborated the findings of the pilot test.

The second comparison was between swing managers selected via the SMSG and those selected via other methods. Table 5 shows that SMSG-selected managers received slightly lower, i.e., better, Performance Review of Swing Managers (PRSM) scores compared to non-SMSG-selected managers. However, the difference between the two groups was not significant.
Table 5. Performance Review of Swing Managers (PRSM) scores of SMSG-selected versus non-SMSG-selected managers

<table>
<thead>
<tr>
<th>Group</th>
<th>n</th>
<th>Mean</th>
<th>S.D.</th>
<th>t-value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMSG-selected</td>
<td>31</td>
<td>2.13</td>
<td>.49</td>
<td>-.77</td>
</tr>
<tr>
<td>Non-SMSG-selected</td>
<td>22</td>
<td>2.25</td>
<td>.59</td>
<td></td>
</tr>
</tbody>
</table>

Two explanations for the similar PRSM scores of SMSG and non-SMSG-selected managers may be advanced. The first explanation is fairly obvious: non-SMSG-selected managers were in position as swing managers more than twice as long as SMSG-selected managers. Beginning September 1, 1990, all swing managers were selected via the SMSG; non-SMSG managers had been selected prior to that date. The benefit of additional experience in the swing manager position would be expected to result in better PRSM scores.

A second explanation is less obvious. Voluntary turnover of managerial employees is often higher for poor performing managers than for better performing managers (Dreher, 1982; Keller, 1984). Turnover of non-SMSG-selected managers might be greater for less effective managers; as a result, the remaining swing managers, as a group, would probably perform better on the PRSM. Most of the non-SMSG-selected swing managers had been in their current position for at least 12 months, so the less effective individuals would have had ample time to resign. However, SMSG-selected managers, all of whom were in position for only 3 to 4 months prior to PRSM evaluation, would have had little time to resign. Thus, SMSG-
selected managers as a group might be expected to receive poorer PRSM scores.

Descriptive statistical analyses and comparison of group means, while important, were not the main focus of the study. The major goal of the study, to develop prediction equations for use in selecting swing managers, required multiple regression analyses. A necessary first step to the regression analysis was to develop a correlation matrix of SMSG factors for use in clustering SMSG items into new factors. The resulting factors could then be entered into multiple regression analyses.

Factors in the Swing Manager Selection Guide

Three factors emerged from the correlational analysis, where all 12 correlations among the subscales of the Swing Manager Selection Guide (SMSG) were examined for clustering into new factors. Many of the SMSG items were highly correlated with one another (Table 6); therefore, three parameters were imposed on the analyses: 1) each new factor must consist of highly correlated items, b) all items within a cluster must be logically connected on a content or construct basis, and c) new factors must demonstrate acceptable reliability, as evidenced by alpha coefficients of .50 or greater.

The new factors, with names, descriptions, and reliability coefficients, were Performance, Leadership/Communication, and Problem Solving.

Performance: A low score for the Performance factor indicates a strong performer in the employee’s current position (prior to promotion),
Table 6. Swing Manager Selection Guide (SMSG) item correlations (n=49)

<table>
<thead>
<tr>
<th>Item</th>
<th>Att</th>
<th>PC</th>
<th>CO</th>
<th>GC</th>
<th>JP</th>
<th>App</th>
<th>HP</th>
<th>Cre</th>
<th>Dep</th>
<th>Per</th>
<th>SM</th>
<th>Pro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attitude (Att)</td>
<td>0</td>
<td>04</td>
<td>32*</td>
<td>25*</td>
<td>42***</td>
<td>56***</td>
<td>14</td>
<td>15</td>
<td>13</td>
<td>-01</td>
<td>34**</td>
<td>49***</td>
</tr>
<tr>
<td>Peer Communication (PC)</td>
<td>0</td>
<td>44***</td>
<td>65***</td>
<td>15</td>
<td>10</td>
<td>29*</td>
<td>33**</td>
<td>12</td>
<td>39**</td>
<td>35**</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Customer Orientation (CO)</td>
<td>0</td>
<td>47***</td>
<td>21</td>
<td>29*</td>
<td>17</td>
<td>32*</td>
<td>17</td>
<td>28*</td>
<td>54***</td>
<td>31*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global Communication (GC)</td>
<td>0</td>
<td>18</td>
<td>18</td>
<td>28*</td>
<td>41**</td>
<td>06</td>
<td>37**</td>
<td>49***</td>
<td>16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Performance (JP)</td>
<td>0</td>
<td>46***</td>
<td>30**</td>
<td>33**</td>
<td>41**</td>
<td>20</td>
<td>23</td>
<td>48***</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appearance (App)</td>
<td>0</td>
<td>-05</td>
<td>25*</td>
<td>54***</td>
<td>12</td>
<td>45***</td>
<td>74***</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Handling Problems (HP)</td>
<td>0</td>
<td>30*</td>
<td>10</td>
<td>31*</td>
<td>17</td>
<td>03</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creativity (Cre)</td>
<td>0</td>
<td>16</td>
<td>35**</td>
<td>33*</td>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependability (Dep)</td>
<td>0</td>
<td>03</td>
<td>34**</td>
<td>65***</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Persuasion (Per)</td>
<td>0</td>
<td>26*</td>
<td>07</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-motivation (SM)</td>
<td>0</td>
<td>38**</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Productivity (Pro)</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*All decimal points have been omitted.

*p<.05.

**p<.01.

***p<.001.
while a high score indicates a weak performer. This factor represents five SMSG items, including "Attitude" (toward customers, co-workers, and supervisors), "Job Performance" (demonstrated ability of worker to perform required tasks), "Appearance" (grooming, uniform, cleanliness), "Dependability" (attendance, willingness to help in emergencies), and "Productivity" (amount of production, as well as quality of production). All five items were obtained from swing manager candidates' most recent crew member performance reviews (Appendix C). The reliability coefficient for Performance was .84 (Cronbach's alpha).

**Leadership/Communication:** Four SMSG items were used to create the Leadership/Communication factor. The SMSG items were "Peer Communication" (ability to empathize and communicate effectively with co-workers), "Customer Orientation" (attitude toward customers, ability to "read" customers), "Self-motivated" (extent to which candidate works without need of supervision and takes initiative), and "Global Communication" (communication skills demonstrated in SMSG interview). The first three of these items were structured interview questions from the SMSG. The fourth item also was contained in the SMSG and asked the interviewer to assess the candidate's overall communication skills. The reliability coefficient for Leadership/Communication was .81 (Cronbach's alpha).

**Problem Solving:** The Problem Solving factor represents three SMSG items. The SMSG items included were "Handling Problems" (ability to identify and resolve problems), "Creativity" (use of creativity to modify or improve job), and "Persuasion" (ability to influence or persuade co-workers and supervisors). All three items were structured interview
questions from the SMSG. The reliability coefficient for Problem Solving was .55 (Cronbach’s alpha).

The three factors met all of the a priori decision parameters. Within each factor, inter-item correlations exceeded .30 (p<.05) in every instance, with the exception of the Performance factor. Within the Performance factor, Attitude correlated .13 with Dependability, but both Attitude and Dependability were highly correlated with the other items within the factor.

Items within each factor appeared to be logically connected. The Performance factor consisted of items drawn from an actual performance review; the Leadership/Communication factor represented interview questions aimed at assessing candidates' interpersonal skills, plus a global assessment of candidates' communication skills; and the Problem Solving factor consisted of interview questions which were intended to assess candidates' problem-solving skills and creativity.

Reliability coefficients for the Performance (α=.84) and Leadership/Communication (α=.81) factors were satisfactory. The Problem Solving factor (α=.55) had a relatively low reliability coefficient. The low reliability coefficient was judged acceptable for further use because the SMSG was a newly developed instrument and the Problem Solving factor consisted of only three items (Gay, 1987).

Prediction of Swing Manager Performance

Three prediction equations were generated from multiple regression analyses of the 27 complete cases. The first equation consisted of six biographical variables plus all three of the clustered Swing Manager
Selection Guide (SMSG) factors (Table 7). The second equation represented a reduced model and included one biographical variable and all three SMSG factors. The third equation represented the preferred model and included one biographical variable and two of the three SMSG factors. In each equation, the dependent variable was candidates' Performance Review of Swing Managers (PRSM) scores, assigned 90 days after promotion to swing manager.

The Nine-factor Equation

This equation included the biographical variables of Number of Previous Jobs, Activities, Educational Level, Gender, Student (status), and Age and the Leadership/Communication, Performance, and Problem Solving SMSG factors. Due to small sample size and the proportionately large number of predictor variables, the adjusted R-square coefficient of .11 was judged to be the more appropriate estimate of explained variance than the unadjusted R-square value (Hinkle, Wiersma, & Jurs, 1988). The F-value for the Nine-factor Equation was 1.35 and was not significant at the .05 alpha level (Table 7).

The Nine-factor Equation was not intended to be used for actual prediction. By performing the multiple regression analysis with the nine variables, the beta-weights of the variables could be compared and the most promising variables selected for further analysis. As Table 7 shows, Leadership/Communication had the highest beta-weight of .47, with Activities slightly lower at -.44. Performance and Problem Solving both had beta-weights of ±.28 (.28 for Performance and -.28 for Problem
Table 7. Prediction of swing manager performance based on biographical and interview data

<table>
<thead>
<tr>
<th>Nine-factor Equation</th>
<th>Four-factor Equation</th>
<th>Three-factor Equation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Full regression)</td>
<td>(Reduced regression)</td>
</tr>
<tr>
<td>Variable</td>
<td>B</td>
<td>Beta weight</td>
</tr>
<tr>
<td>Number of previous jobs</td>
<td>.14</td>
<td>.20</td>
</tr>
<tr>
<td>Activities</td>
<td>-.23</td>
<td>-.44</td>
</tr>
<tr>
<td>Leadership/Communication</td>
<td>.45</td>
<td>.47</td>
</tr>
<tr>
<td>Education Level</td>
<td>.13</td>
<td>.19</td>
</tr>
<tr>
<td>Performance</td>
<td>.38</td>
<td>.28</td>
</tr>
<tr>
<td>Gender</td>
<td>-.09</td>
<td>-.09</td>
</tr>
<tr>
<td>Problem Solving</td>
<td>-.25</td>
<td>-.28</td>
</tr>
<tr>
<td>Student</td>
<td>-.07</td>
<td>-.06</td>
</tr>
<tr>
<td>Age</td>
<td>-.01</td>
<td>-.21</td>
</tr>
</tbody>
</table>

F-ratio = 1.35  
R-square = .42  
Adjusted R-square = .11  
n=27

F-ratio = 3.12*  
R-square = .36  
Adjusted R-square = .25  
n=27

F-ratio = 3.64*  
R-square = .32  
Adjusted R-square = .23  
n=27

*p<.05.
Solving). All of the remaining variables had beta-weights of ±.21 or less and were judged to have little potential as predictors of performance.

The emergence of the Activities variable as the biographical variable with the highest beta-weight (Table 7) was not expected. Many organizations do not ask for extracurricular activities on application blanks; those organizations which do ask for such information often disregard it. For example, the Dasher Corporation (Iowa) McDonald's restaurants do not have a space for extracurricular activities on their application blanks (Appendix H). Courtesy Corporation (Wisconsin) McDonald's restaurants do ask for school-related sports or activities (Appendix I), but six of the unit managers admitted that they tend to overlook this information when making hiring and promotion decisions.

Not only were effective swing managers more likely to be involved in activities, but the types of activities required extensive commitment. Fifteen of the 27 SMSG-selected swing managers for whom data were available participated in activities (Table 3). Of those 15 individuals, 10 were involved in band or varsity athletics (66.7%), activities requiring major time commitments.

In addition to the high beta-weight for the Activities variable, the fact that its beta-weight and coefficient of determination were negative was unexpected. The negative coefficient indicates that swing manager candidates who were more involved in activities received lower, i.e., better, PRSM scores than individuals who were less involved with activities.
Prior research studies by Greenberger and Steinberg (1986) and Divine and Bartlett (1988) indicated that students employed while in school were less likely to be involved in extracurricular activities than nonemployed students. The findings of the present study appear to conflict with those of the earlier studies, and may suggest the need for a re-examination of the relationships among school, work, and school-related activities. Although many students who work while in school may be less involved in activities than those who do not work, those student workers who are more involved in activities than other workers seemed to become more effective swing managers. This relationship contradicted the perception that employment while in school inhibits participation in extracurricular activities. Courtesy Corporation executives were encouraged by this apparent relationship between activities and success as a swing manager.

The emergence of the three SMSG factors as potential predictors was anticipated. The literature indicated that structured interview scores, such as those derived from the SMSG, could help predict future performance (Wiesner & Cronshaw, 1988). The fact that three of the four highest beta-weights belonged to SMSG factors supported the literature.

The positive coefficients for Leadership/Communication and Performance indicated that, as expected, candidates who received low SMSG scores also received low PRSM scores (low scores are better than high scores). Thus, candidates who received better Leadership/Communication and Performance scores were later rated as better swing managers.

However, the negative coefficient for Problem Solving indicated that candidates who received better scores for Problem Solving received poorer
PRSM scores. Thus, candidates who received better Problem Solving scores on the SMSG were later rated as poorer swing managers.

The inverse relationship between Problem Solving scores and PRSM scores was unexpected. During the developmental stages of the SMSG, the advisory group was unanimous in its belief that creative, inquisitive problem solvers would become effective swing managers. Courtesy Corporation executives shared this expectation and were surprised by this particular finding.

Investigation into the possible reasons for the inverse relationship between Problem Solving and PRSM scores suggested two possible explanations. The "Creative" item, which was one of three SMSG items to be clustered into the Problem Solving factor, asks candidates about previous attempts to make parts of their job easier (Appendix E). The "Persuasion" item, another component of the Problem Solving factor, asks candidates about previous attempts to persuade or influence other employees or managers (Appendix E). Barry Tossi, director of operations for Courtesy Corporation, speculated that "The kind of person who would do well in the interview on those questions probably is a major pain in the neck as a swing manager...always questioning, stretching the limits of the McDonald's concept. Many unit managers probably find that type of swing manager to be threatening" (B. Tossi, personal communication, May 18, 1991).

Tossi went on to speculate that the same swing managers who scored well on the problem solving factor and scored poorly on the PRSM probably will advance higher in the organization. The same qualities that may be
perceived as negative at the swing manager level become assets at higher levels. Conversations with five Courtesy Corporation unit managers appeared to reinforce Tossi's contentions.

The "Handling Problems" item, which was the third component of the Problem Solving factor, asks the candidate about previous problem situations and how they were handled by the candidate (Appendix E). During the SMSG interviews, candidates who described creative, effective problem-solving incidents scored well. However, Courtesy Corporation executives stated that company policy is for restaurant managers or assistant managers to handle all complaints and operational problems. Apparently, the most valued response to perceived problems is to alert higher-level managers rather than solve them one's self.

The failure of the Age, Student, and Education Level variables to emerge as potential predictors could be explained by the homogeneity of the sample in biographical terms. More than 76% of the swing manager candidates were 16 to 19 years old, 67% were still in school, and 75% were in 10th or 11th grade (Table 3). This lack of variability probably prevented the Age, Student, and Education Level variables from being valid predictors. A larger, more heterogeneous sample might display greater variability and cause such variables as Age and Education Level to become effective predictors.

The failure of the Number of Previous Jobs and Gender variables to emerge as potential predictors does not appear to be due to lack of variability in the sample. Regarding the Job Number variable, 15% of the promoted candidates had no work experience prior to working for
McDonald's, 33% had held one previous job, and 52% had held two or more previous jobs (Table 3). The Gender variable included 42% men and 58% women. Apparently, swing manager performance is not dependent on gender or number of previous jobs.

The failure of the Job Number variable to emerge as a promising predictor appears to contradict conventional wisdom and existing practice in McDonald's restaurants. According to Anne Willford, personnel director for Courtesy Corporation, unit managers are encouraged to use prior work experience as a major determinant in employee selection (Anne Willford, personal communication, May 19, 1991). Based on the relatively low beta-weight for Job Number, such emphasis may be misplaced.

The Four-factor Equation

This model included the Activity biographical variable and the three SMSG factors labeled Performance, Leadership, and Problem Solving. Due to small sample size and the relatively large number of predictor variables, the adjusted R-square value of .25 was judged to be the most appropriate estimate of explained variance (Table 7). The F-value for the Four-factor Equation was 3.12 and was statistically significant (p<.05).

The generation of the Four-factor Equation was an attempt to maximize explained variance while reducing the number of variables in a prediction equation. Thus, the four variables with the highest beta-weights were selected from the Nine-factor Equation analysis and entered into multiple regression analysis. The fact that the Four-factor Equation was statistically significant and explained 25% of the variance in PRSM scores
supported the inclusion of the four variables. The presence of all three SMSG factors in the equation also provided further evidence of the validity of the SMSG.

An examination of the beta-weights of the four variables in the Four-factor Equation shows that the Leadership/Communication, Performance, and Activities variables had beta-weights of .43, .36, and -.34, respectively (Table 7). The beta-weight for Problem Solving was much lower, with a value of -.23. The Problem Solving factor, already troubled by its low reliability and its inverse relationship with swing manager performance, now appeared to be a likely candidate for omission from future prediction equations.

The Three-factor Equation

This model included the Activity biographical variable and the SMSG factors labeled Leadership/Communication and Performance. Due to small sample size relative to the number of predictor variables, the adjusted $R^2$ value of .23 was judged to be a more appropriate estimate of explained variance than the unadjusted $R^2$ value (Table 7). The $F$-value for the Three-factor Equation was 3.64 and was statistically significant ($p<.05$).

The generation of the Three-factor Equation was an attempt to achieve optimum prediction while meeting the requirements of validity, reliability, and usability. Evidence of the validity of the equation consisted of the adjusted $R^2$ value of .23 and the statistical significance of the Three-factor Equation. Despite the loss of one factor
in the prediction equation, the Three-factor Equation explained almost as much variance as did the Four-factor Equation (.23 versus .25).

Most important of all, the Three-factor Equation enhances the usability of selection processes based on the equation. Both pilot test and field test data indicated that the SMSG took about 30 to 40 minutes to administer. Dropping the Problem Solving factor means that three of the six SMSG interview questions could be eliminated without substantial loss in prediction. Such a reduction would reduce the length of the selection interview to about 15 minutes, which may increase the popularity and usage of the SMSG with unit managers.

Comparison of the prediction equations

The choice of whether to use the Three-factor or Four-factor prediction equations depends on the user’s priorities. The Four-factor Equation explains slightly more variance than the Three-factor Equation (R-square = .25 vs. R-square = .23), which should result in better prediction of performance. However, the Three-factor Equation requires less time to use. This increased usability may be the deciding factor in choosing the most appropriate prediction equation for a given operation.

Validity of Alternative Selection Models

The goal of a prediction study is to develop a selection model that offers criterion-related evidence of validity. A commonly used method is to calculate the validity coefficient, i.e., the correlation between selection scores and performance review scores. Three validity
coefficients are reported: the correlation between the original SMSG scores and PRSM scores, the correlation between the adjusted selection scores for the Four-factor Equation and PRSM scores, and the correlation between the adjusted Three-factor Equation and PRSM scores. Meta-analytic reviews of literature report mean validity coefficients of .25 to .40 for assessment centers, cognitive tests, and bio-data (Gaugler, Rosenthal, Thornton, & Bentson, 1987; Mumford & Owens, 1988). Similar meta-analytic reviews of interview studies report average validity coefficients of .25 to .35 for structured interviews (Wiesner & Cronshaw, 1988; Harris, 1989). These validity coefficients are useful standards of comparison for the findings of the present study.

**Original SMSG Model**

The original 12-item Swing Manager Selection Guide (SMSG) scores correlated .26 with scores from the Performance Review of Swing Managers (PRSM) (Table 8). The validity coefficient was not statistically significant at the desired .05 level.

**Table 8. Validity coefficients between Swing Manager Selection Guide (SMSG) scores and Performance Review of Swing Managers (PRSM) scores**

<table>
<thead>
<tr>
<th>Model</th>
<th>Validity Coefficient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original SMSG Model</td>
<td>.26</td>
</tr>
<tr>
<td>Four-factor Model</td>
<td>.60***</td>
</tr>
<tr>
<td>Three-factor Model</td>
<td>.57***</td>
</tr>
</tbody>
</table>

***p<.001.
Although the validity coefficient for the Original SMSG Model did not achieve statistical significance, it was quite close (p<.08 versus p<.05). Had the sample size been larger, the coefficient of .26 would probably reach significance. Major meta-analytic reviews of the interview literature report average validity coefficients of .25 to .35 for structured interviews (Wiesner & Cronshaw, 1988); the .26 value for the Original SMSG Model approached the average for structured interviews.

**Four-factor and Three-factor Models**

Scores for the Four-factor Model correlated .60 with PRSM scores (Table 8) and were statistically significant (p<.001). Scores for the Three-factor Model correlated .57 with PRSM scores (Table 8) and were statistically significant (p<.001).

The validity coefficients for the two models were much higher than the average validity coefficients reported in the literature. Validity coefficients for structured interview studies averaged .30 to .35 (Wiesner & Cronshaw, 1988), while coefficients for bio-data studies averaged .30 to .45 (Mumford & Owens, 1987) and coefficients for assessment studies averaged .25 to .40 (Gaugler et al., 1987). No published structured interview studies could be found with validity coefficients as high as the .60 value for the Four-factor Model or the .57 value for the Three-factor Model.

Unusually low or unusually high validity coefficients require an attempt to understand and explain the possible reasons for their departure.
from the norm. Regarding the present study, four possible explanations may be advanced to illumine the unusual findings:

1. The study was based on a small sample.
2. The study was contaminated by escalation bias, where the manager who promoted candidates later reviewed their performance as swing managers.
3. The present study investigated promotion rather than initial selection decisions.
4. The Four-factor and Three-factor Models combined biographical data with interview and performance review data.

The concern over small sample size is legitimate in this case. Only 27 complete data-sets consisting of SMSG scores, biographical data, and PRSM scores were available. However, field tests in personnel selection which provide criterion-related evidence of validity frequently have small sample size because of the realities of working with on-going businesses and real employees. For example, the Weekley and Gier (1987) study of structured interview use in selection of jewelry sales clerks had a sample size of 24 and reported a validity coefficient of .45 (p<.01). The Orpen (1985) study of structured interview use in the selection of insurance personnel had a sample size of 19 and reported a validity coefficient of .48 (p<.01). Finally, two structured interview studies by Latham (reported in an article by Latham and Saari, 1984) had sample sizes of 29 with reported validity coefficients of .39 (p<.05) and .40 (p<.05).

Obviously, larger samples are desirable. However, as the previous examples attest, small sample size is common in structured interview
research. Comparing the validity coefficients of the Four-factor and Three-factor Models (.60 and .57, respectively) to those of the studies cited, the difference in coefficients is still impressive.

Escalation bias is also a concern because all of the swing manager candidates were selected and later reviewed by the same person. Escalation bias might affect PRSM scores through inflation of scores; if this occurred, all SMSG-selected managers would receive inflated scores, which would reduce the variance in PRSM scores. Less variance in PRSM scores should result in a lower correlation coefficient between SMSG scores and PRSM scores. The fact that the correlation coefficients were high for both the Four-factor and Three-factor Models seems to refute this possibility.

If inflation of PRSM scores does occur due to escalation bias, PRSM scores for SMSG-selected managers should be markedly higher than for non-SMSG managers. Each SMSG-selected manager was promoted and later reviewed by the same person, while 14 of the 22 non-SMSG-selected managers were promoted by one manager and reviewed by another. As Table 4 shows, mean PRSM scores for SMSG- and non-SMSG-selected managers were virtually identical (2.13 versus 2.25); there was no statistically significant difference between the two groups (p<.05).

Finally, the review of literature suggested that escalation bias may exist, but it does not have a major impact on validity. Studies by Schoorman (1988) and Arvey, Miller, Gould, and Burch (1987) showed that escalation bias had little effect on the validity of selection procedures.
The third and fourth concerns, that the study dealt with promotion decisions rather than initial selection decisions, and that the Four-factor and Three-factor Models combined several types of data, are indeed worthy of further consideration. A review of the assessment center literature helps put these two concerns into perspective. Assessment centers are generally utilized to make promotion decisions, rather than initial selection decisions (Gaugler et al., 1987). Assessment centers also use multiple methods to acquire various types of data. Interviews, work samples, role-playing, and cognitive tests are frequently included in the assessment center experience. Meta-analytic reviews of the assessment center literature report average validity coefficients of .25 to .35 (Gaugler et al., 1987), which are much lower than the coefficients of .60 and .57 for the Four-factor and Three-factor Models of the present study.

Reviewing the validity coefficients for the Original SMSG Model, the Four-factor Model, and the Three-factor Model, the criterion-related evidence of validity appears to be strong for the Four-factor and Three-factor Models. Several explanations for the unusually high validity coefficients were examined, including small sample size, escalation bias, promotion versus initial selection decisions, and use of multiple data sources. Although each of the explanations may have affected the validity coefficients in the study, none of the explanations seems especially convincing. Essentially, the high validity coefficients for the Four-factor and Three-factor Models must be taken as evidence of the validity of the models.
Summary of Findings and Discussion

The typical swing manager candidate was young, female, Caucasian, currently enrolled in high school, and moderately involved in extracurricular activities. Promoted candidates received significantly better Swing Manager Selection Guide (SMSG) scores than did nonpromoted candidates. Swing managers who were promoted through the use of the SMSG received slightly better scores on the Performance Review of Swing Managers (PRSM) than swing managers who had been promoted via other means; however, the difference in PRSM scores was not statistically significant.

Three new factors were derived from examination of a correlation matrix consisting of the 12 items of the SMSG. These factors were Leadership/Communication, Performance, and Problem Solving. The three new factors were entered into multiple regression analyses along with six major biographical variables, including Number of Previous Jobs, Activities, Gender, Student (status), Education Level, and Age. Examination of this Nine-factor Model showed that the equation had a nonsignificant F-ratio of 1.35 and accounted for 11% of the variance in PRSM scores (adjusted R-square value was used due to small sample size).

The four variables with the highest beta-weights--Activities, Performance, Leadership/Communication, and Problem Solving--were used in further multiple regression analyses. A Four-factor and a Three-factor Model were developed. The Four-factor Model, which included the Activities, Leadership/Communication, Performance, and Problem Solving factors, had a significant F-ratio of 3.12 and explained 25% of the variance in PRSM scores (adjusted R-square value used due to small sample size).
size). The Three-factor Model, which included the Activities, Leadership/Communication, and Performance factors, had a significant F-ratio of 3.64 and explained 23% of the variance in PRSM scores (adjusted R-square value used due to small sample size).

Correlation coefficients were computed between three alternative selection model scores and PRSM scores. The Original SMSG Model scores correlated .26 with PRSM scores (p<.08). The Four-factor Model scores correlated .60 with PRSM scores (p<.001), and the Three-factor Model scores correlated .57 with PRSM scores (p>.001). Potential explanations for the high coefficients for the Four-factor and Three-factor Models were examined. The best explanation seemed to be the most obvious, that the two selection models are valid.
The present study had two main objectives. The first objective was to develop an interview procedure for selection of fast food restaurant swing managers that would be reliable, valid, and usable. The second objective was to determine the personal, situational, and business characteristics that best predict swing manager performance.

Based on the review of literature, structured interviewing appeared to be the most promising selection procedure for restaurant usage. Evidence of reliability and validity for the structured interview was acceptable (Wiesner & Cronshaw, 1988) and interviewing appeared to be more usable, hence practical, than other selection procedures.

Summary

Instrument development and pilot testing

Instrument development and pilot testing took place in Iowa with the assistance of the Dasher Management Company, a seven-unit McDonald's franchisee. An advisory panel of three restaurant managers and three area supervisors assisted in developing the selection instrument. The developed instrument was named the Swing Manager Selection Guide (SMSG).

Two pilot tests were conducted in Iowa. The first pilot test utilized 12 current swing managers; 6 of the 12 were high-performing individuals and 6 were less effective swing managers. Restaurant managers evaluated the 12 swing managers using the SMSG, and the SMSG scores were
correlated with the participants' Performance Review of Swing Managers (PRSM) scores. The resulting correlation coefficient was .70 (p<.05).

The second pilot test consisted of using the preliminary selection instrument to evaluate 21 actual candidates for swing manager positions. A total of 14 candidates were promoted and 7 were not promoted. Promoted candidates performed significantly better on the SMSG than nonpromoted candidates, with a mean SMSG score of 1.58 for promoted candidates versus 2.82 for nonpromoted candidates (t=-4.82; p<.001). Based on the quantitative and qualitative information obtained during pilot testing, the SMSG was judged ready for field testing.

**Field test**

Field testing was accomplished in Wisconsin with the participation of Courtesy Corporation, a 16-unit McDonald's franchisee. The SMSG as developed and pilot tested in Iowa was adapted for use with the Wisconsin group. A training videotape was produced which consisted of mock interviews: three of the six SMSG interview questions were asked, and preferred and less-preferred responses were given to each question. Development and final editing of the videotape were accomplished with the assistance of the three Iowa McDonald's area supervisors.

The training videotape was then used in group training of Wisconsin restaurant managers. Participating managers used the SMSG to rate the videotaped interview responses; the resulting scores yielded a reliability coefficient of .79, which was judged to be acceptable.
Data collection was conducted from September 1, 1990 through August 1991. A combination of telephone calls and personal visits was used to collect SMSG scores and PRSM scores, as well as biographical and qualitative data.

A total of 49 swing manager candidates were evaluated with the SMSG; 36 were promoted and 13 were not promoted. PRSM scores were collected for 31 of the 36 swing managers selected using the SMSG. In addition, PRSM scores were obtained for 22 swing managers who had been promoted without the use of the SMSG.

Data analysis

Data analysis consisted of five stages. The first set of analyses involved descriptive statistics and was followed by t-test comparisons of mean SMSG scores of promoted versus nonpromoted candidates. In addition, PRSM scores of SMSG-promoted swing managers were compared with PRSM scores of swing managers promoted without the use of the SMSG.

As an aid to the development of prediction equations, the 12 SMSG items were clustered into new factors. A 12 by 12 correlation matrix was used to help cluster the items. Highly correlated items were clustered into new factors and these factors were examined for reliability using Cronbach’s alpha.

Multiple regression analysis was then initiated and three prediction equations were generated. The first equation used all six relevant biographical variables plus all of the SMSG factors. The second, reduced, equation used the items with the highest beta-weights emerging from the
first equation in an effort to retain predictive power while reducing the number of predictor variables. A third, preferred, equation used the most promising variables from the second equation in an attempt to retain predictive power with the smallest possible number of predictor variables.

The final set of data analyses involved the computation of "validity coefficients": Pearson correlation coefficients representing the strength of the relationship between selection scores and PRSM scores. Three coefficients were calculated. The first calculation correlated the original SMSG scores with PRSM scores; the last two calculations used regression coefficients to adjust selection scores, then correlated the adjusted selection scores with PRSM scores.

Findings

The typical swing manager candidate was female, young, still in school, with moderate pre-McDonald's work experience and moderate involvement in school-related extracurricular activities. Promoted candidates were slightly older than nonpromoted candidates indicating that age may affect SMSG performance.

Promoted swing manager candidates performed significantly better on the SMSG than nonpromoted candidates, with a mean SMSG score of 2.14 for promoted candidates versus 2.56 for nonpromoted candidates (t=-4.26, p<.001). This indicated that the SMSG did discriminate between various levels of performance.

Swing managers selected with the SMSG received a mean PRSM score of 2.13, compared to 2.25 for swing managers selected through other
procedures. Although SMSG-selected managers received marginally better PRSM scores than the other swing managers, the difference was not significant at the desired .05 level.

A 12 by 12 correlation matrix was generated to aid in clustering the 12 SMSG items into logically connected, highly intercorrelated factors. The new factors created were Performance, Leadership/Communication, and Problem Solving. The Performance factor was the mean of five SMSG item scores, all five of which were obtained from the candidates' most recent crew performance review prior to promotion. Leadership/Communication was the mean of four SMSG item scores, all aimed at assessing candidates' communication and leadership skills. Problem Solving was the mean of three SMSG item scores which assessed candidates' creativity and problem solving abilities. Alpha coefficients for the three factors were .84 for Performance, .81 for Leadership/Communication, and .55 for Problem Solving.

Three multiple regression equations were calculated. The first of these entered all six relevant biographical variables, including number of previous jobs, activities, education level, gender, student status, and age. In addition, all three SMSG factors were entered into the calculation. The purpose of the Nine-factor Equation was to compute beta-weights for the nine variables which could be used as an aid to selecting promising variables for additional prediction equations. The Nine-factor Equation explained 11% of the variance in PRSM scores (adjusted R-square used due to small sample size) and was not significant at the desired .05 alpha level.
The second regression equation utilized the four variables from the Nine-factor Equation with the highest beta-weights. These variables were Activities and the three SMSG factors: Performance, Leadership/Communication, and Problem Solving. This Four-factor Equation explained 25% of the variance in PRSM scores (adjusted R-square used due to small sample size) and was statistically significant (p<.05).

The third regression equation eliminated the Problem Solving factor due to its low beta-weight relative to the other variables and its low alpha reliability (α=.55) relative to the other SMSG factors. This Three-factor Equation explained 23% of the variance in PRSM scores (adjusted R-square used due to small sample size) and was statistically significant (p<.05).

Both the Four-factor and Three-factor equations explained a moderate amount of the variance in PRSM scores with relatively few predictor variables. By eliminating the Problem Solving variable, the Three-factor Equation allows streamlining the SMSG. Two of the six structured interview questions could be eliminated, which would save time; very little predictive power is sacrificed by dropping the Problem Solving variable.

Validity coefficients were computed between PRSM scores and the 12-item, Four-factor, and Three-factor SMSG scores. Original SMSG scores correlated .26 with PRSM scores. The Four-factor adjusted selection scores correlated .60 with PRSM scores (p<.001), and the Three-factor adjusted selection scores correlated .57 with PRSM scores (p<.001).
The results of validity coefficient calculations were especially encouraging. Most selection studies in the industrial psychology literature report coefficients of .30 to .40 (Wiesner & Cronshaw, 1988; Gaugler, Rosenthal, Thornton, & Bentson, 1987); a few studies report coefficients of .45 to .53 (Orpen, 1985; Arvey, Miller, Gould, & Burch, 1987). Although the original SMSG validity coefficient was not significant at the .05 alpha level, the two revised selection models were promising with validity coefficients higher than any reported in the literature.

Conclusions and Recommendations

The high validity coefficients and promising prediction equations arising from the present study indicate that the goals of the study were achieved. The first goal of developing a reliable, valid, and usable interview for selection of fast food restaurant swing managers was accomplished in the instrument development, pilot testing, and field testing of the SMSG. Quantitative findings, such as the high alpha reliability of the factors of the SMSG and the fact that the SMSG factors emerged as significant predictors in the regression equations, attest to the efficacy of the SMSG.

Proof that the second goal of determining the personal, situational, and business characteristics that best predict swing manager performance was met can be found in the multiple regression equations and the validity coefficients. Statistically significant prediction equations were generated using the most promising variables; these equations, when used
to adjust candidates' selection scores, yielded spectacular validity coefficients.

The procedures used in the present study also were supported by the results of the study. An advisory panel was used to help develop the instrument, rather than extensive job analyses and questionnaires. Many industrial psychologists argue that the latter method is indispensable in well-designed selection studies (Latham, 1989); however, the high validity coefficients arising from the present study suggest that advisory panels can be very effective.

A second procedure that was validated by the findings was the use of a simple 5-point Likert-type rating scale as opposed to Behaviorally Anchored Rating Scales (BARS). Many researchers such as Latham (1989) insist on the importance of using BARS to rate interviewees. Given the high validity coefficients of the present study and the fact that simple Likert scales are much less expensive and time consuming to develop than BARS, it would seem that simpler rating scales should be used.

Using videotaped training appears to have been important to the success of the present study. High inter-rater reliability and the high validity coefficients support the future inclusion of video training. This is especially true of multi-unit operations where many different individuals make hiring decisions.

Finally, the use of multiple regression analyses to develop prediction equations was supported by the findings of the present study. Multiple regression is seldom used in selection studies; the findings of the present study suggest it should be more widely used.
Obviously, as with any field-based research study, the findings of the present study should be interpreted with caution. The study had a rather small sample size and was geographically limited to western Wisconsin. In addition, most of the participants were Caucasian, young, and still in school.

Additional limitations must be considered, such as the type of job involved in the study and the nature of the participating company. Extending the conclusions beyond fast food restaurant swing managers must be approached with caution.

Despite the limitations of the present study, the successes of the structured interview procedure, simple rating scales, use of videotape training, and use of multiple regression analyses to develop prediction equations and revise selection procedures are all impressive. Fast food restaurant managers might consider using the findings of the present study to revise their selection procedures.

Future research in restaurant employee selection might consider using the SMSG in various geographic settings that could provide more gender balance, ethnically diverse populations, as well as more variation in age and education levels. Additionally, using an SMSG-type selection instrument in full-service restaurants, hotels, and other segments of the hospitality industry would be of interest. Another potential project could involve using an SMSG-type instrument for initial selection of employees at all staff and managerial levels.

A less directly related, but interesting topic arising from the present study is the effect of chronological age on interview performance.
Very little is known about the use of the interview with very young interviewees (14 to 20 years old).

Another research topic suggested by the current study is the relationship between academic performance, extracurricular activities, and work. The relationship between school and work has been the topic of debate and editorial comment, but very little unbiased empirical research.

The results of the present study have implications for vocational education as well as industry. High school and college educators could emphasize the importance of communication skills, leadership, problem-solving, and productivity in fast food management careers. Hospitality educators could integrate the findings into Human Resource Management classes with the goal of improving students' knowledge of effective selection procedures.

In conclusion, the goals of the present study were successfully accomplished; this study should encourage similar hospitality field-based research in the future. Well-designed, research-based studies offer the best chance for hospitality researchers to have a meaningful impact on hospitality industry practice.
REFERENCES


ACKNOWLEDGMENTS

The Iron Curtain has fallen, the Soviet Union disintegrated, and a new president has been elected in the three-and-a-half years since I began working on my Ph.D. Although the completion of my doctoral dissertation is not as earth-shaking (to the multitudes) as these other recent events, it certainly ranks as one of the high points of my life.

A number of people have made this achievement possible. My heartfelt thanks go to Dr. Alyce Fanslow for her creativity, her patience, and her willingness to devote countless hours to my work. Alyce always seemed to know when I needed a pat on the back or a kick in the backside!

I also wish to thank Dr. Lynne Baltzer for her hard work, knowledge of the hospitality industry, and attention to both style and substance in my dissertation. To my other committee members, thank you! Dr. Brown's careful reading and incisive comments have improved this dissertation. Dr. Netusil's warm personality, encouragement, and helpful suggestions are much appreciated. Dr. Torrie's caring nature and her excellent questions have inspired me to re-evaluate my work as a result of her influence.

To my fellow graduate students, especially Jane Heikenen, Anthony Cawdren, Vern Markey, Rae Guillermo, Bill McFadden, Sophia Rolle, and Karina Belzile, thank you for your support. Thanks also to the world's greatest typist (and genuinely nice person) Bonnie Trede!

Finally, thank you, Annabella, Maria and Joey, for your patience, strength, and support. I couldn't have done it without you!
APPENDIX A.

INTERVIEW GUIDE, IOWA
1. What do you think makes for a successful swing manager? (personality, energy level, sex, age, educational level, etc.)

2. Of the characteristics you've mentioned above, which ones can you assess BEFORE a person begins working as a swing manager?

3. How would you assess these characteristics? (application form, interview, previous work record, etc.)

4. [FOCUS] O.K., you're telling me that _____, _____, _____, _____, and _____ are all important, and can be assessed prior to a swing manager beginning his/her duties.

   A. Could you rank these attributes in descending order of importance from 1 to 5?
B. What spread would you like to see between first-ranked and lower-ranked characteristics? For example, could we assign 30 points to the #1 characteristic, 25 for the #2 characteristic, and so on, dropping down to 10 points for the #5 characteristic?

>>Obviously, we're consolidating the list to 5 attributes.<<

5. Let's review what we have so far:
APPENDIX B.

CREW PERFORMANCE REVIEW, IOWA
McDonald's Crew Performance Review

**CREW PERSON'S NAME**

**YOUR PERFORMANCE COUNTS...at McDonald's, your performance is the key ingredient in our “pay for performance” philosophy. Performance reviews provide you and your manager the opportunity to discuss your performance, determine where you stand, and most importantly, how you can achieve greater success in the future. The performance review process enables us to clearly recognize individual contributions and see that employees receive fair compensation.**

We encourage you to provide feedback on all or any of the areas of performance listed below:

**DATE OF REVIEW:**

What stations have S.O.C.'s been completed and communicated to the employee for this review period?

<table>
<thead>
<tr>
<th>Job Performance</th>
<th>Meets Standards</th>
<th>Does Not Meet Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Follows procedures in preparing all products according to McDonald's standards (SOC's)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Maintains speed and quality of counter and/or drive-thru service according to McDonald's standards (SOC's)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Maintains Q.S.C. standards, and enforces holding times</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Hustles during rushes and helps out others when needed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Follows the practice of clean-as-you-go</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Shows interest in self-development</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ATTITUDE**

1. Works as a team member
2. Follows Management directions and observes store policies
3. Is friendly and courteous to customers and fellow employees

**McDonald's Image (Appearance)**

1. Wears a complete, neat, and clean uniform
2. Displays good personal hygiene

**DEPENDABILITY**

1. Shows up as scheduled
2. Stays busy without direct supervision
3. Helps out in emergencies

**OVERALL RATING (Check One):**

- **Outstanding**
  - Performance is always of exceptional quality; our best performers.
- **Excellent**
  - Performance consistently exceeds job requirements and expectations; significant contributor.
- **Good**
  - Performance meets job requirements and expectations; steady contributor, job done well.
- **Needs Improvement**
  - Performance fails short of meeting job requirements and expectations.
- **Unsatisfactory**
  - Performance is unacceptable; has significantly failed to meet job requirements.

**COMMENTS:**

**Major Achievements:**

**Major Performance Areas Needing Improvement:**

**Crew Feedback:**

**Pay Increase Amount:**

**Effective Date of Increase:**

**Date of Next Pay Review:**

**Crew's Signature**

**Date**

**Manager's Signature**

**Date**
APPENDIX C.

CREW PERFORMANCE REVIEW, WISCONSIN
125
CREW PERFORMANCE REVIEW

Name ___________________________________________ Store Number _________

Start Date _______________ Review Date _______________

Review Type (circle): WAGE 60 DAY L.O.A.

Review Summary:

<table>
<thead>
<tr>
<th>JOB PER</th>
<th>ATTITUDE</th>
<th>DEPEND.</th>
<th>APPEAR.</th>
<th>PROD.</th>
<th>AVE.</th>
</tr>
</thead>
</table>

Evaluated by: __________________________________________

Review 3 ____________________ Present Wage ___________
Review 2 ____________________ Wage Increase ___________
This Review __________________ New Wage ____________
AVERAGE ____________________ Maximum Wage ___________

Supervisor's Signature ________________________________

OVERALL EVALUATION, INCLUDING SUMMARY OF REVIEW:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Employee Signature ___________________________ Date __________

Reviewing Manager ___________________________ Date __________
<table>
<thead>
<tr>
<th></th>
<th>(1) OUTSTANDING</th>
<th>(2) EXCELLENT</th>
<th>(3) GOOD</th>
<th>(4) SATISFACTORY</th>
<th>(5) NEEDS IMPROVEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>JOS PERFORMANCE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performs all criteria for those stations worked as described or S.O.C.'s.</td>
<td>1.0</td>
<td>1.5</td>
<td>2.0</td>
<td>2.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Shows leadership. Pays attention to details. Follows all procedures.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Looks for tasks to do on own. Knows procedures and meets all job requirements.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understands job requirements but needs more than minimal help from supervisors and others.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fails to meet job requirements.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ATTITUDE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respected by other crew. Exceptional pride in work.</td>
<td>1.0</td>
<td>1.5</td>
<td>2.0</td>
<td>2.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Remains calm! Enthusiastic about work. Agrees to help others in need.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Courteous and friendly to crew &amp; customers. Has ability to work as a team member.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seldom complains. Responsive to corrective measures.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complains and disturbs. Lack of pride in work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>RESPONSIBILITY</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requires no supervision. Unquestionable integrity. Always volunteers to help in emergency.</td>
<td>1.0</td>
<td>1.5</td>
<td>2.0</td>
<td>2.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Never absent or tardy. Works extra if needed. Calls for help if needed. Unlimited availability.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proper notice for time off. Needs minimal supervision. Limited availability.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Will not volunteer to help in emergency. Needs some supervision. General direction. Excessive talking that is not work related.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Idle when left alone. Always close supervision. Tardiness without approval.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>APPEARANCE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grooming above reproach. Always keeps work area clean.</td>
<td>1.0</td>
<td>1.5</td>
<td>2.0</td>
<td>2.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Consistently clean and neat. Attractive in appearance. Keeps work area clean. Maintains a professional and businesslike appearance.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dresses according to standards. Presents a friendly look to customers, crew and mgrs. Follows &quot;Clean as you go&quot; standard.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occasionally must be reminded of stds. regarding dress, grooming, hygiene, and personal habits.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frequently must be reminded of stds. regarding dress, grooming, hygiene, and personal habits.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PRODUCTIVITY</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knows all crew positions. Sets standard for putting out excellent quality at rapid pace.</td>
<td>1.0</td>
<td>1.5</td>
<td>2.0</td>
<td>2.5</td>
<td>3.0</td>
</tr>
<tr>
<td>Willing to put out extra when short handed. Knows 5 positions (can include 1 main, or set-up position). Uses priorities to effectively accomplish tasks. Maintains high level of energy throughout shift.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knows a minimum of 3 positions &amp; can perform during a rush with little or no help.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poor at making adjustments during volume periods. Does not produce quality product at reasonable speed.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX D.

SWING MANAGER SELECTION GUIDE (SMSG), IOWA
SWING MANAGER EVALUATION GUIDE

This guide is intended to be used as an aid in selecting Swing Managers. It includes:

1. Six questions, with rating scales, to use in a brief interview.
2. A copy of the McDonald's Crew Performance Review form.
3. A tally sheet, with instructions, for entering scores for each attribute.

Proper use of this guide should help managers to compare candidates on the same criteria—to compare "apples with apples." The result should be better choices, yielding more effective Swing Managers.

It is very important that the user of this packet be as objective as possible. If personal feelings, either positive or negative, creep in, they may influence the ratings on some factors. The result of such influence could be less effective selection decisions.

NOTE ON RATING SCALES

Each of the interview questions includes a rating scale for evaluating the candidate's responses. These scales are designed like this:

1. Outstanding  
2. Excellent  
3. Good  
4. Needs Improvement  
5. Unsatisfactory

This type of scale is very similar to the scale you currently use to evaluate your Swing Managers. You might think in terms of "Outstanding" as being typical of the top 10% of candidates; "Excellent" as typical of the next 25%; "Good" as representing the middle 35%; "Needs Improvement" as typical of the next 20%; and "Unsatisfactory" as being the bottom 10% of candidates.

You may find it helpful to make notes during the interview, and wait until the end of the interview to organize your conclusions and assign ratings.
INTERVIEW QUESTIONS

1) People skills/Communication skills

a. Tell me about two or three people you work with at McDonald's, whom you had to interact with "differently." Perhaps these persons were new to McDonald's, or older workers, or disabled, or just quite different in personality from you.

PERSON HOW HANDLED RESULTS

Additional comments:

SCORE: 1 2 3 4 5 (circle one)

b. Tell me about two or three situations where you had to deal with an unhappy customer. How did you know they were unhappy? How did you handle them?

SITUATION HOW YOU FOUND OUT ABOUT PROBLEM RESULTS

Additional comments:

SCORE: 1 2 3 4 5 (circle one)

2) Decision making/Problem solving/Creativity

a. Tell me about some problem situations (other than unhappy customers) you've encountered on the job. How did you handle them? Would you handle them the same way again?

SITUATION SOLUTION EFFECTIVENESS

Additional comments:

SCORE: 1 2 3 4 5 (circle one)
2) Continued

b. Have you been able to make any parts of your job easier or more rewarding? How?

<table>
<thead>
<tr>
<th>TASK</th>
<th>ACTION</th>
<th>RESULT</th>
<th>EFFECTIVENESS</th>
</tr>
</thead>
</table>

Additional comments:

SCORE: 1 2 3 4 5 (circle one)

3) Leadership

a. Describe some of the times you tried to persuade or influence other crew members or members of the management team.
What did you do? Why? How did it turn out?

<table>
<thead>
<tr>
<th>ATTEMPT TO PERSUADE</th>
<th>REASON</th>
<th>METHODS USED</th>
<th>RESULTS</th>
</tr>
</thead>
</table>

Additional comments:

SCORE: 1 2 3 4 5 (circle one)

b. Describe some situations where you felt you did more than was expected on the job.

<table>
<thead>
<tr>
<th>NORMAL EXPECTATIONS</th>
<th>WHAT YOU DID</th>
<th>RESULTS</th>
</tr>
</thead>
</table>

Additional comments:

SCORE: 1 2 3 4 5 (circle one)
1) People skills/Communication skills

a. Use the candidate's MOST RECENT Crew Performance Review form. Refer to item I (see attached Crew Review sheet with letter coding) "Is friendly and courteous to customers and fellow employees."

Give the candidate 1 POINT for "Exceeds Standards," 3 POINTS for "Meets Standards," and 5 POINTS for "Does Not Meet Standards."

>>> SCORE

b. Enter the score from question A under People Skills.

>>> SCORE

c. Enter the score from question B under People Skills.

>>> SCORE

d. Evaluate the candidate's ORAL COMMUNICATION ability, based on the interview and your general observations. Consider such factors as eye contact, gestures/body language, clarity, etc.

>>> SCORE

Add the points from each of the items above, and divide by four.

>>> ENTER THE RESULT HERE: AVERAGE SCORE

2) Internalize McDonald's concept/High standards


Enter the points here:

A____ B____ C____ D____ E____ G____ J____ K____

Add up the points from above, and divide by eight. Enter the resulting total here:

>>> AVERAGE SCORE
3) Decision making/Problem solving/Creativity
   a. Enter the score from question A under Decision making (from the interview questions).

      >>> SCORE______

   b. Enter the score from question B under Decision making (from the interview questions).

      >>> SCORE______

   Add the scores from the two items above, then divide by two. Enter the resulting score here:

      >>> AVERAGE SCORE______

4) Leadership
   a. Use the candidate’s MOST RECENT Crew Review form. Refer to item M, and give 1 POINT for "Exceeds Standards," 3 POINTS for "Meets Standards," and 5 POINTS for "Does Not Meet Standards."

      Enter score here: >>> SCORE______

   b. Enter the score from question A under Leadership (from the interview questions).

      >>> SCORE______

   c. Enter the score from question B under Leadership.

      >>> SCORE______

   d. Add the three scores above, and divide by three. Enter the resulting score here:

      >>> AVERAGE SCORE______

5) Work level--quality and quantity

      Enter these scores here: A____ B____ C____ D____

   Add the above scores together, and divide by four. Enter the result here:

      >>> AVERAGE SCORE______
APPENDIX E.

SWING MANAGER SELECTION GUIDE (SMSG), WISCONSIN
TOUR {} (McDonald's)

CREW TRAINER EVALUATION GUIDE

This guide is intended to be used as an aid in selecting Crew Trainers. It includes:

1. Six questions, with rating scales, to use in a brief interview.
2. A copy of the McDonald's Crew Performance Review form.
3. A tally sheet, with instructions, for entering scores for each attribute.

Proper use of this guide should help managers to compare candidates on the same criteria—to compare "apples with apples." The result should be better choices, yielding more effective Crew Trainers.

It is very important that the user of this packet be as objective as possible. If personal feelings, either positive or negative, creep in, they may influence the ratings on some factors. The result of such influence could be less effective selection decisions.

NOTE ON RATING SCALES

Each of the interview questions includes a rating scale for evaluating the candidate's responses. These scales are designed like this:

1 2 3 4 5
Outstanding Excellent Good Needs Improvement Unsatisfactory

This type of scale is very similar to the scale you currently use to evaluate your personnel. You might think in terms of "Outstanding" as being typical of the top 10% of candidates; "Excellent" as typical of the next 25%; "Good" as representing the middle 35%; "Needs Improvement" as typical of the next 20%; and "Unsatisfactory" as being the bottom 10% of candidates.

You may find it helpful to make notes during the interview, and wait until the end of the interview to organize your conclusions and assign ratings.
### INTERVIEW QUESTIONS

1) **People skills/Communication skills**

a. **Peer communication**

Tell me about two or three people you work with at McDonald's whom you have to interact with "differently." Perhaps these persons were new to McDonald's or older workers, or disabled, or just quite different in personality from you.

<table>
<thead>
<tr>
<th>PERSON</th>
<th>HOW HANDLED</th>
<th>RESULTS</th>
</tr>
</thead>
</table>

Additional comments:

SCORE: 1 2 3 4 5 (circle one)

b. **Customer orientation**

Tell me about two or three situations where you had to deal with a difficult customer. How did you know they were unhappy? How did you handle them?

<table>
<thead>
<tr>
<th>SITUATION</th>
<th>HOW YOU FOUND OUT ABOUT PROBLEM</th>
<th>RESULTS</th>
</tr>
</thead>
</table>

Additional comments:

SCORE: 1 2 3 4 5 (circle one)

2) **Decision making/Problem solving/Creativity**

a. **Handling problems**

Tell me about some problem situations (other than unhappy customers) you’ve encountered on the job. How did you handle them? Would you handle them the same way again?

<table>
<thead>
<tr>
<th>SITUATION</th>
<th>SOLUTION</th>
<th>EFFECTIVENESS</th>
</tr>
</thead>
</table>

Additional comments:

SCORE: 1 2 3 4 5 (circle one)
2) Continued

b. Creative
   Have you been able to make any parts of your job easier or more rewarding? How?

<table>
<thead>
<tr>
<th>TASK</th>
<th>ACTION</th>
<th>RESULT</th>
<th>EFFECTIVENESS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Additional comments:

   SCORE: 1 2 3 4 5 (circle one)

3) Leadership

a. Persuasion
   Describe some of the times you tried to persuade or influence other crew members or members of the management team. What did you do? Why? How did it turn out?

<table>
<thead>
<tr>
<th>ATTEMPT TO PERSUADE</th>
<th>REASON</th>
<th>METHODS USED</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Additional comments:

   SCORE: 1 2 3 4 5 (circle one)

b. Self-motivated
   Describe some situations where you felt you did more than was expected on the job.

<table>
<thead>
<tr>
<th>NORMAL EXPECTATIONS</th>
<th>WHAT YOU DID</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Additional comments:

   SCORE: 1 2 3 4 5 (circle one)
SCORE SHEET FOR SELECTION PACKET

1) People skills/Communication skills
   a. Use the candidate’s MOST RECENT Crew Performance Review form. Refer to item B (see attached Crew Review sheet with letter coding) "Attitude."

   Enter the point score here.
   
   >>> SCORE ______

   b. Enter the score from question A under People Skills, "Peer communication."

   >>> SCORE ______

   c. Enter the score from question B under People Skills, "Customer orientation."

   >>> SCORE ______

   d. Evaluate the candidate’s ORAL COMMUNICATION ability, based on the interview and your general observations. Consider such factors as eye contact, gestures/body language, clarity, etc. "Global communication."

   >>> SCORE ______

   Add the points from each of the items above, and divide by four.

   >>> ENTER THE RESULT HERE: AVERAGE SCORE ______

2) Internalize McDonald’s concept/High standards
   a. Use the candidate’s MOST RECENT Crew Review form. Refer to item D, "Appearance" and item A, "Job performance."

   Enter the scores for these two items here:

   A_______  D_______

   Add up the points from above, and divide by two. Enter the resulting total here:

   >>> AVERAGE SCORE ______
3) Decision making/Problem solving/Creativity

   a. Enter the score from question A under Decision making (from the interview questions), "Handling problems."
      >>> SCORE

   b. Enter the score from question B under Decision making (from the interview questions), "Creative."
      >>> SCORE

      Add the scores from the two items above, then divide by two.
      Enter the resulting score here:
      >>> AVERAGE SCORE

4) Leadership

   a. Use the candidate's MOST RECENT Crew Review form. Refer to item C and enter score here:
      >>> SCORE

   b. Enter the score from question A under Leadership (from the interview questions), "Persuasion."
      >>> SCORE

   c. Enter the score from question B under Leadership, "Self-motivated."
      >>> SCORE

   d. Add the three scores above, and divide by three. Enter the resulting score here:
      >>> AVERAGE SCORE

5) Work level--quality and quantity

   a. Use the candidate's MOST RECENT Crew Review form. Refer to item E, "Productivity."

      Enter the score here:
      >>> SCORE
APPENDIX F.

VIDEO SCRIPT
Interviewer: Tell me about two or three people you work with at McDonald's whom you had to interact with "differently." Perhaps these persons were new to McDonald's, or older workers, or disabled, or just quite different in personality from you.

Applicant: (Good response) One situation was when I first started working here. There was this lady named Brenda who did various odd jobs, cleaned tables, mopped floors, stuff like that. I guess she was kinda slow--maybe retarded, or whatever the proper name for it is. She was always real nice, smiled a lot, and kept busy most of the time.

The second week I was here, we were really getting hit one night after a basketball game. My manager asked me to go out front and help Brenda get tables cleaned off, because she was really falling behind. Well, I'm kind of a hyper person--so I jumped in and started buzzing around cleaning tables. I looked over and saw Brenda with a funny look on her face, like she was scared by all the hustle and bustle. She was moving slower and slower, and customers were giving her dirty looks.

I went over to her and said, "Brenda, why don't you clear off all the stuff from the empty tables, and I'll follow behind you and wipe off the tables and chairs. We'll be a team!" Then I gave her a big smile. She smiled back, said O.K., and started clearing at a decent pace. I wiped, and we got the place cleaned up pretty fast!
Applicant: (Bad response) Another situation was when I first started working here. This old lady named Brenda worked here, keeping the dining room clean, mopping floors, stuff like that. She was really slow--I mean, she musta been retarded or something.

About the second week I was here, we were really getting hammered one night after a ball game. My boss told me to go out front and help Brenda get tables cleaned off--she was really moving in slow motion!

Well, I'm kind of a take-charge person, so I jumped in and started rushing around getting tables cleaned. I looked over and saw Brenda with a funny look on her face, like she was freaking from all the crowds and noise. Customers were starting to get upset, so I went over to Brenda and said, "Brenda, we've gotta get these tables cleaned TONIGHT! Go back to the back and get some more napkins and straws--I'll take care of these tables." She shook her head yes, and disappeared for about 15 minutes.

I got the tables cleaned off, which kept the customers happy. Heck, I even saved Brenda from being embarrassed in front of all those people. I'm not sure people like her can handle the stress at a McDonald's during busy times.

Interviewer: Tell me about some problem situations (other than unhappy customers) you've encountered on the job. How did you handle them? Would you handle them the same way again?
Applicant: (Bad response) Hmmm...let's see. Oh yeah--the messed up freezer! I had been with McDonald's for three months when I moved over to the fry station. We started getting customer complaints on the fries--but I knew I was following procedures. One of the other cooks checked the reach-in freezer, where we keep the bags of fries. The temperature was about 46 degrees, so the fries kept thawing out, and wouldn't cook up right.

I complained to the swing manager and the assistant manager about this; both of them said they'd take care of it--but nothing happened.

This went on for a few more days. Finally, I got really sick of all the complaints, and the managers not doing anything about it. From then on, every time I heard a complaint about the fries, I would run around to the front and tell the customer about the broken freezer, and how the managers wouldn't do anything about it. I told them to complain to the manager so that he would get it fixed.

Well, I guess this must have worked, because the reach-in finally got fixed a week later.

Another problem was last spring, when it was really rainy. Customers kept tracking in mud all the time, and the floors really looked gross. Our manager had us mop the floor every half hour, which helped a little. Still, the place generally looked bad, and the floor got real slippery right after it was mopped. I actually saw several people slip, and one guy even fell down.
I remembered that one time when the fry station floor was really slick, the assistant manager had us mop it, and then sprinkle salt to make it less slick. I told the swing manager about this, and we started salting the floor after mopping. It still didn’t help the mess a lot, but it kept the customers from slipping!

Applicant: (Good response) Well, I remember one thing...maybe I shouldn’t tell about this but...what the heck! I had been with McDonald’s about 3 months when I got moved to the fry station. I discovered that the reach-in freezer where we keep the bags of fries wasn’t staying cold enough. Every time I pulled out a bag of fries, they were thawed out and kinda mushy. This made the fries get greasy and nasty looking.

I asked the other cooks about this, and they said it had been that way for a couple of weeks. They said they had told the assistant manager about the problem, but nothing had been done about it. Just to be sure, I mentioned the problem to the assistant manager one night, and he said he’d take care of it—but nothing happened.

Well, I’m sorry, but I’m a french fry freak, and I know lots of people come here for our fries. I had to do something! What I did was, I kept my fry stock really low (like 1 or 2 bags) during slow times, and only stocked up during busy periods. Then, after the rush, I returned most of the unused fry bags to the walk-in freezer. This made for a little more work, but the fries got a lot better.
Not too long after that, the assistant manager quit. The new assistant manager came from another store, and got the reach-in repaired within two days of my telling her about it.

Another thing that happened, I guess you could call it a problem, was last spring. It was really rainy, and people were always tracking mud into the store. The floors really looked terrible! Our manager had us mop the floor every half hour, which helped a little--but the floor still looked bad much of the time, and people sometimes slipped and even fell on the wet floor.

Well, I remembered visiting the Holiday Inn when my brother worked there. They had special mats at certain dangerous spots--they rented them, and the mats were replaced twice a week. They were really bright and colorful, too!

I told the manager about the mats, and she called around, got a couple of prices on some nice looking area mats, and put them in. Problem solved--for about $10 per week!

Interviewer: Describe some situations where you felt you did more than was expected on the job.

Applicant: (Good response) Actually, a lot of us do more than is expected a lot of the time. I guess I can’t come up with specific instances, but I can tell you the types of things I do a lot that are "above and beyond."
When I used to work nights, we always seemed to work short-handed on weekends. Somebody would call in sick, or something. I usually worked one of the registers, but I got to be fast enough that I could cruise through the line, assemble orders, and even back up the drive-thru girl in a pinch. Really, it's kind of fun--it makes the time go by faster.

Another thing I do is on days when the delivery trucks come in. If I'm not super-busy, I jump in and help put stuff up, rotate product, and so on. It kinda breaks up the day, you know?

Even before I was a designated trainer, I was often asked to help break in new workers. Sometimes this is almost like working two positions, at least until the new person catches on and gets fast.

Applicant: (bad response) Well, sometimes the manager asks me to stay and work over. If I don't have anything else going on, I usually do it. Sometimes I've even agreed to come in on my day off to work.

Also, when we're short-handed, the manager sometimes shifts me to another area, usually drive-thru, because I'm pretty fast there. Even though I'm not scheduled for that area, I still do it.

Sometimes I have to help break in a new person. It's not really part of my job, but I do it anyway to help out.
APPENDIX G.

PERFORMANCE REVIEW OF SWING MANAGERS, WISCONSIN
**Crew Trainer Performance Review**

<table>
<thead>
<tr>
<th>Training Skills</th>
<th>Communication Skills</th>
<th>Maintenance of STDS</th>
<th>Attitude</th>
<th>Goal Setting</th>
<th>Ave.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Evaluated by:**

<table>
<thead>
<tr>
<th>Review</th>
<th>Present Wage</th>
<th>Wage Increase</th>
<th>New Wage</th>
<th>Maximum Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>This Review</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supervisor's Signature**

**Overall Evaluation, Including Summary of Review:**

________________________

________________________

________________________

________________________

________________________

**Current Status Regarding Management:**

________________________

________________________

________________________

________________________

**Employee Signature** ____________________________ **Date**

________________________

________________________

________________________

________________________

**Reviewing Manager** ____________________________ **Date**
<table>
<thead>
<tr>
<th>(1) OUTSTANDING</th>
<th>(2) EXCELLENT</th>
<th>(3) SATISFACTORY</th>
<th>(4) NEEDS IMPROVEMENT</th>
<th>(5) UNACCEPTABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TRAINING SKILLS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stimulates interest and enthusiasm on</td>
<td>Stresses and encourages</td>
<td>Utilizes training</td>
<td>Does not always make</td>
<td>Does not utilize</td>
</tr>
<tr>
<td>the position. Trains and continues</td>
<td>every training session.</td>
<td>speed and accuracy</td>
<td>effective use of</td>
<td>training materials.</td>
</tr>
<tr>
<td>and continues even when not formally</td>
<td>Makes effective use of</td>
<td>when training.</td>
<td>training time. Does</td>
<td>Training skills are</td>
</tr>
<tr>
<td>scheduled.</td>
<td>time during entire</td>
<td>Consistent when</td>
<td>not acceptable by</td>
<td>not acceptable by</td>
</tr>
<tr>
<td></td>
<td>training shift. Follows</td>
<td>training.</td>
<td>management team.</td>
<td>management team.</td>
</tr>
<tr>
<td></td>
<td>up on all training.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Timely completion of</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>scheduled S.O.C.'s and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>alerts training mgr. of</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>any problems.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>COMMUNICATION SKILLS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provides new ideas and suggestions</td>
<td>Provides feedback to</td>
<td>Instructs clearly</td>
<td>Does not always in-</td>
<td>Lacks adequate com-</td>
</tr>
<tr>
<td>for improving operations. Always</td>
<td>crew training mgr.</td>
<td>and patiently. Encourages</td>
<td>struct clearly and</td>
<td>munication skills</td>
</tr>
<tr>
<td>prepared to train. Assumes leadership</td>
<td>Realizes that people</td>
<td>questions. Provides</td>
<td>patiently. Occasion-</td>
<td>to ensure quality</td>
</tr>
<tr>
<td>position among other</td>
<td>must be handled dif-</td>
<td>feedback to</td>
<td>ally must be remem-</td>
<td>training.</td>
</tr>
<tr>
<td>trainers.</td>
<td>ferently for the</td>
<td>trainees. Actively</td>
<td>bered of the proper</td>
<td></td>
</tr>
<tr>
<td></td>
<td>same results. Explains</td>
<td>participates in</td>
<td>communication skills</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the &quot;whys&quot; and &quot;hows&quot; for</td>
<td>crew training</td>
<td>used when training.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>each position. Writes</td>
<td>meetings.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>constructive comments on</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>S.O.C.'s.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MANNER OF STANDARDS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Familiar with store equipment and</td>
<td>Consistently upholds</td>
<td>Proficient on every</td>
<td>Occasionally must</td>
<td>Frequently must be</td>
</tr>
<tr>
<td>possible problems and solutions.</td>
<td>standards as out-</td>
<td>position. Stresses</td>
<td>be reminded of cor-</td>
<td>reminded of proper</td>
</tr>
<tr>
<td>Possesses high level of energy</td>
<td>lined in S.O.C.'s.</td>
<td>quality, service &amp;</td>
<td>rect standards.</td>
<td>standards.</td>
</tr>
<tr>
<td>throughout shift. Displays sense of</td>
<td>Maintains credibility</td>
<td>cleanliness. Sets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>urgency.</td>
<td>by practicing what is</td>
<td>positive attitude</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>instructed. Safety</td>
<td>on and off the</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>consciousness. Does</td>
<td>floor.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>informal (non-scheduled)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>training.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ATTITUDE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motivates and creates enthusiasm</td>
<td>Projects a positive</td>
<td>Maintains a profes-</td>
<td>Does not always</td>
<td>Lack of pride in</td>
</tr>
<tr>
<td>by example. Exceptional pride</td>
<td>attitude. Has earned</td>
<td>sional, business-</td>
<td>work. Does not pro-</td>
<td>work. Does not pro-</td>
</tr>
<tr>
<td>in work.</td>
<td>the respect of crew</td>
<td>like attitude and</td>
<td>ject a positive</td>
<td>ject a positive</td>
</tr>
<tr>
<td></td>
<td>members. Conscientious</td>
<td>appearance. Cour-</td>
<td>attitude to customers</td>
<td>attitude to customers</td>
</tr>
<tr>
<td></td>
<td>employee.</td>
<td>teous and friendly</td>
<td>mgmt or crew.</td>
<td>mgmt or crew.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>to crew, mgmt and</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>customers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>GOAL-SETTING</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shows initiative and persistence in</td>
<td>An-established leader</td>
<td>Has made separa-</td>
<td>Shows &quot;I'll go on.</td>
<td>Lack of motivation.</td>
</tr>
<tr>
<td>getting things accomplished in own</td>
<td>within the crew. Self-</td>
<td>tion from crew. Shows</td>
<td>desire to grow</td>
<td>is not perceived</td>
</tr>
<tr>
<td></td>
<td>motivated. Verbal</td>
<td>desire to grow</td>
<td>personal goals for</td>
<td>as leader among</td>
</tr>
<tr>
<td></td>
<td>commitment to a mgmt</td>
<td>within the</td>
<td>growth and im-</td>
<td>the crew.</td>
</tr>
<tr>
<td></td>
<td>position.</td>
<td>company.</td>
<td>provement.</td>
<td></td>
</tr>
</tbody>
</table>

OVERALL RATING: TRAINING SKILLS ___ COMMUNICATION SKILLS ___ MANNER OF STDS. ___ ATTITUDE ___ GOAL-SETTING ___
APPENDIX H.

APPLICATION BLANK, IOWA
**CREW APPLICATION FOR EMPLOYMENT**

McDonald's is an Equal Opportunity Employer and fully subscribes to the principles of Equal Employment Opportunity, The Civil Rights Act of 1964, and State and Local Laws prohibit discrimination on the basis of race, color, religion, sex, or national origin. In addition, State and Local Laws prohibit discrimination on the basis of disability and the Age Discrimination in Employment Act of 1967, and some State and Local Laws prohibit discrimination on the basis of age with respect to individuals who are at least 40 but less than 65 years of age. It is our policy to comply with these Acts, and information requested on this application will not be used for any purpose prohibited by law.

### GENERAL INFORMATION

**Name**: 

**First** 

**Middle** 

**Last**

**DATE OF BIRTH** / / 

**Social Security Number** / / 

**Address**

**Street**

**Apt./Suite No.**

**City**

**State**

**Zip**

**Phone**

**How long at this address?**

**Previous address**

**How long there?**

### AVAILABILITY:

**TOTAL HOURS**

**PART TIME**

**HOURS**

**FROM**

**TO**

**AVAILABLE PER WEEK**

**FULL TIME**

**AVAILABLE**

**AVAILABILITY DURING SCHOOL VACATIONS**

- FULL [ ]
- PART [ ]
- NONE [ ]

**Are you a United States Citizen?** [ ] YES [ ] NO

**If not, type of visa**

**Referred by**

**Do you have transportation to work?** [ ] YES [ ] NO

**Do you have a relative in the employ of McDonald’s?**

[ ] YES [ ] NO [ ] YES

**If so, who?**

**Have you ever been employed by McDonald’s before?** [ ] YES [ ] NO

**If so, when and where last employed?**

**During the past 7 years, have you ever been convicted of a crime, excluding misdemeanors and traffic violations?** [ ] NO [ ] YES

**If yes, describe in full**

### EDUCATION

**Name and address of last school attended**

**Dates**

**Circle last year completed**

- Grade 5 [ ] 6 [ ] 7 [ ] 8 [ ]
- High School 1 [ ] 2 [ ] 3 [ ] 4 [ ]
- Other 1 [ ] 2 [ ] 3 [ ] 4 [ ]

**Special training and skills**

### MILITARY

**Branch**

**From**

**To**

**Rank**

**Type of Draft**

**Discharge**

**Class**

### PHYSICAL

**Any health problems or physical defects which could affect your employment?** [ ] NO [ ] YES

**If health problems or physical defects exist, please explain**

### IN CASE OF EMERGENCY

**Name**

**Phone**

**Address**
**EMPLOYMENT BACKGROUND**
List below your two most recent employers, beginning with your most recent one. If you were employed under a pseudonym or other name, please enter that name in the space provided.

May we contact your present employer? **YES** **NO**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>(include zip code)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>Type of work</td>
<td>Name of Supervisor</td>
</tr>
<tr>
<td>Date started</td>
<td>Date left</td>
<td>Salary or wage</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>(include zip code)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>Type of work</td>
<td>Name of Supervisor</td>
</tr>
<tr>
<td>Date started</td>
<td>Date left</td>
<td>Salary or wage</td>
</tr>
</tbody>
</table>

**REFERENCES**
Give below the names of two persons, excluding relatives and former employers whom you have known at least one year.

<table>
<thead>
<tr>
<th>NAME</th>
<th>ADDRESS</th>
<th>PHONE NUMBER</th>
<th>YEARS ACQUAINTED</th>
</tr>
</thead>
</table>

PLEASE READ CAREFULLY THE SECTION BELOW BEFORE SIGNING:

1. I certify that the information contained in this application is correct to the best of my knowledge and understanding. That deliberate falsification of this information is grounds for dismissal in accordance with McDonald’s policy.

2. I authorize the persons listed above to give you any and all information concerning my previous employment and any pertinent information they may have, verbal or otherwise, and release all parties from all liability for any damage that may result from furnishing same to you.

**Signature**

**Date**

DO NOT WRITE BELOW THIS LINE
APPENDIX I.

APPLICATION BLANK, WISCONSIN
EMPLOYMENT APPLICATION

NAME
APL NO.
OR BOX
CITY
STATE
ZIP
AREA

ARE YOU 18 OR OLDER? YES NO
IF NOT, AGE
IF YES, DATES, LOCATION AND REASON FOR LEAVING

AVAILABILITY:
TOTAL HOURS
AVAILABLE PER WEEK

HOW FAR DO YOU LIVE FROM RESTAURANT?

SCHOOL MOST RECENTLY ATTENDED:
NAME
TEACHER OR COUNSELOR
GRADUATED
NOW ENROLLED?

TWO MOST RECENT JOBS:
COMPANY
PHONE
SUPERVISOR
DATES WORKED FROM
TO
SALARY
REASON FOR LEAVING

The Secretary of Health and Human Services has determined that certain diseases, including hepatitis A, salmonella, shigellosis, staphylococcus, streptococcus, gonorrhea and syphilis, may prevent you from serving food or handling food equipment in a sanitary or healthy fashion. An employer is not required to hire you if you are serving food or handling food equipment in a sanitary or healthy fashion. Is there any reason why you cannot perform the essential functions of this job? YES NO

Do you have any convictions or non-convictions resulting in a jail term? YES NO

Have you ever been convicted of a crime, excluding minor traffic violations, which is a felony or misdemeanor? YES NO

During the past 7 years have you ever been convicted of a crime, excluding minor traffic violations? YES NO

SIGNATURE
DATE

APPLICANTS — PLEASE DETACH THIS TEAR OFF SECTION AND TAKE WITH YOU

If hired, Federal Law requires that you furnish documentation showing your identity and that you are legally authorized to work in the United States.

SEE BACK OF THIS TAB FOR SPECIFIC DOCUMENTS NEEDED.

As a Member of the McDonald's Family
Your #1 Priority
Will Be To
Take Care
Of Our Customers
In Exchange we offer
Flexible Hours
Advancement Opportunities
Competitive Wages
Wage Reviews
Paid Training
Friendly Work Environment
Uniforms
Liberal Meal Benefits
Employee Activities

Printed on Recycled Paper

This McDonald's franchise is an Affirmative Action and Equal Opportunity Employer. Various Federal, State, and local laws prohibit discrimination on account of race, color, religion, sex, age, national origin, disability or veterans status. It is this McDonald's Franchise's policy to comply fully with these laws, its application, and information requested on this application will not be used for any purpose prohibited by law.

Your application will be considered active for 30 days for consideration after that you must reapply. This restaurant is owned and operated by an independent McDonald's franchisee.

OPERATED BY INDEPENDENT McDONALD'S LICENSEE.

153