Memorandum

To: Erika Paterson

From: Morgan Brandt

Date: November 11, 2019

Subject: Progress Report for SW Hour Allocation and Job Satisfaction

Hello Professor,

Here is the current progress made on the formal report as well as the schedule going forward to meet our deadlines:

* **Audience for the report will be:** 
  + General Manager, Craig Westley
  + Assistant General Manager, Barry Fisher
* **Purpose of the report:** To investigate the effectiveness of SW Event Technology’s current scheduling procedures to find any opportunity to improve hour allocation and job satisfaction amongst technicians.
* **Significance:** The opportunity to improve procedures carries long term benefits for employee longevity while minimizing costs for onboarding new employees and training.
* **Research Plan:**
  + Problems
    - Lack of tech training within the company
    - Unable to maintain 30hr minimums year around
    - Understaffed during certain events
    - Staff spread thin during peak seasons
    - Overtime/banked hours
  + Primary Resources
    - *39 Question Survey to employees* (polls on main problems outlined)

Link: https://forms.gle/hkL9utGrRevFP86e9

* + - *2 Interviews with management*
  + Secondary Resources
    - *Current Industry Climate*

"The Commercial Audiovisual Industry has Enjoyed Two Years of Growing Sales and Employment, According to AVIXA's Monthly Sentiment Index."*Targeted News Service*, 10/03/2018.

* + - *Hour Allocation and Flexibility*

Attia, El-Awady, Philippe Duquenne, and Jean-Marc Le-Lann. "Considering Skills Evolutions in Multi-Skilled Workforce Allocation with Flexible Working Hours."*International Journal of Production Research*, vol. 52, no. 15, 2014, pp. 4548-4573.

* + - *Work and Family Balance*

Tuttle, Robert, and Michael Garr. "Shift Work and Work to Family Fit: Does Schedule Control Matter?"*Journal of Family and Economic Issues*, vol. 33, no. 3, 2012, pp. 261-271.

* + - *Overtime versus Hiring Costs*

Ingels, Jonas, and Broos Maenhout. "The Impact of Overtime as a Time-Based Proactive Scheduling and Reactive Allocation Strategy on the Robustness of a Personnel Shift Roster."*Journal of Scheduling*, vol. 21, no. 2, 2018; 2017;, pp. 143-165.

* **Writing Schedule:**
  + Nov 18th: Interview questions sent to Barry Fisher and Craig Westley
  + Nov 18th: Complete Introduction
  + Nov 24th: Finalize results from survey
  + Nov 25th: Complete Figures and Secondary sources to be incorporated
  + Nov 30th: Complete body and list concluding recommendations
  + Dec 2nd: Review the organization, style, and design of the draft
  + **Dec 4th**: Formal Report Draft Submitted to Team Forum
  + Dec 8th: Complete the following”
    - Abstract
    - List of illustrations
    - Appendices
    - References list
  + **Dec 10th**: Peer Review Submitted to Team Forum
  + Dec 12th: Incorporate review suggestions into the final copy
  + Dec 15th: Finalize conclusion and recommendations
  + **Dec 19th**: Formal Report Submitted to Team Forum

Overall, the report is progressing as originally quoted in the proposal. The only changes are that I am interviewing only 2 managers, not the V.P., Ben Pidskalny or Owner, Cal McCarthy, due to their availability. The other challenge is that during the offseason there are fewer technicians available to survey, resulting in a small sample size. Thus, I must continue my formal report with these renewed conditions. With your confirmation, I will continue with the report based on this timeline, and if you have any questions feel free to contact me at morganbrandt1@gmail.com.

Morgan Brandt