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Tlayuda Querida Needs Assessment

FINAL REPORT

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1. Executive Summary

Tlayuda Querida (a pseudonym) is a traditional Mexican restaurant located in Oaxaca, Mexico, a popular tourist city that attracts visitors from all over the world. The restaurant industry in the area is very competitive and several political and economic factors negatively impact the restaurant's operations. While the owner has general business experience, especially running a cafe, he lacks restaurant experience.

The problem is the high rate of employee turnover. The current willing turnover rate, monthly, is 8.62%. Annually, it is 103.47% (extrapolated from the past nine months). The desired annual turnover rate is 15-20%. The amount of employees who leave the restaurant willingly is unacceptable for the owner, as it impacts his business negatively in several ways, primarily increased costs associated with hiring and training new employees. Our job is to uncover the reasons employees leave his restaurant willingly.

1.1 Data Collection

Using several performance improvement frameworks and tools, we crafted interview and survey questions to investigate the causes of employee satisfaction and dissatisfaction in the restaurant. These frameworks and tools scan the organization and its environment to see if they are optimized for facilitating good employee performance and high satisfaction, and how they promote or obstruct possible interventions.

We began by interviewing the client to understand the organization's goals and processes. Then we interviewed five current employees and two former employees to find their satisfaction with working at the restaurant and what contributes to their level of satisfaction. With this qualitative data, we were able to get a general idea of the turnover issue and crafted some preliminary interventions. Next, we distributed a survey to both former and current employees to confirm, rate, and sequence our selected interventions. Finally, a final interview with the owner and his right hand supervisor helped us finalize our recommended interventions.

We adhered to ethical and professional standards at all times through the data collection process by obtaining informed consent from all participants and maintaining their confidentiality.

1.2 Gap Analysis

The gap was stated by the client: the current annual turnover rate is 103.47% and the desired annual turnover rate is 15-20%. Unfortunately, the client was unable to provide extant data to help our analysis. Nor were we able to find an average turnover rate of either Oaxaca, Mexico more broadly, or U.S. border towns with Mexico. Therefore, we could not offer a typical turnover rate that we could aim to reach via our interventions.

We used Chevalier's Updated Behavior Engineering Model to look for gaps at the environmental and individual levels before moving on to our cause analysis, where we identified if such gaps were the cause of employee dissatisfaction and therefore the high turnover rate.

1.3 Cause Analysis

Our systematic and systemic analysis of the organization, its environment, and the individuals within uncovered several contributing factors to low employee satisfaction and therefore the high turnover rate. The most impactful factors include: a former manager who created a toxic work environment, a lack of employee guidance during downtime, a lack of pre-training and onboarding for new hires, poor communication across departments, and a lack of knowledge about how employees can obtain raises and/or bonuses. Additionally, we uncovered an additional need: the business does not keep track of extant data that could help needs assessments and evaluations in the future.

1.4 Intervention Selection

We used a SWOT Analysis to categorize our findings into strengths, weaknesses, threats, and opportunities. This helped us identify areas in need of interventions and possible interventions. After discussion, we arrived at seven possible interventions. We used a Multicriteria Analysis to rate each intervention in terms of their necessity, potential efficacy, affordability, and feasibility. The survey data and the final interview with the owner and his right hand supervisor helped us accurately rate the interventions per the listed criteria. We ranked the interventions based on their final ratings. We recommend implementing these interventions in the listed order.

The interventions are:

1. A team lead or a checklist (that must be initialed as tasks are completed) during downtime to make sure people know what they should be doing
2. A new approach to hiring/monitoring managers (behavioral interview techniques and/or hiring from within, 360 feedback system on manager performance) so that managers maintain a healthy work environment
3. An onboarding and/or periodic training (includes disaster/safety, roles and expectations, a guided tour, introductions) so employees have the opportunity for improvement and know that the restaurant is investing in them
4. Encourage ownership to keep track of increased costs related to turnover vs costs during steady states of employment so that realistic expectations can be set for bridging gaps and setting goals
5. Establish and clarify performance achievements and time milestones that lead to raises/bonuses so employees know that their efforts are rewarded fairly
6. Offer professional development opportunities based on roles and make them consistent (50% paid English lessons, training for chefs to make new dishes, etc., cross-train during downtime) to incentivize employees to remain employed with the restaurant
7. Regular team meetings with After Action Reports to improve communication and coordination

1.5 Limitations

The data collection and analysis process came with several limitations. The first limitation is that the researchers' first language is not Spanish and all interviews were conducted in Spanish. This made it difficult to grasp all nuances of the interviewee responses and to ask high quality follow up questions. Additionally, the restaurant had very limited extant data for the team to use. We therefore could not make quantitative predictions about how much impact our interventions would improve the business.

Additionally, we could only find data from the U.S., not Mexico, on willing turnover. Due to significant economic, political and cultural differences between the U.S. and Mexico, it is not appropriate to use a U.S. turnover rate to assess if the client's turnover rate is atypical. Another big limitation was the personal relationship between one team member and the client. This may have influenced interviewees to be reluctant to share their true opinions due to fear of repercussions. Other limitations existed with regard to communication, which are detailed in this report.

2. Background

2.1 Client Organization

Tlayuda Querida (a pseudonym) is a traditional Mexican restaurant, located in Oaxaca de Juárez, a small city in southern Mexico. The city is a popular tourist destination, mostly attracting tourists from the U.S., Mexico and the rest of Latin America. The restaurant is located in the Centro neighborhood, near a famous landmark. This desirable location means a high rent and intense competition with other restaurants.

The owner of the restaurant is a local. About ten years ago, he opened a café in another neighborhood in the city. Following the success of that café, he decided to open a second location in the Centro neighborhood. However, in December 2022, after two years of disappointing sales, he decided to pivot and Tlayuda Querida was born.

Over the past nine months, the restaurant has had an average gross income of 300,000 MXN (Mexican pesos) per month, with about 60,000 MXN pesos in profit. This average income may be less than the annual average, as the restaurant has yet to be open during the high season, which is from October to December. The restaurant's reputation has grown through social media and word-of-mouth, and it is starting to be featured in travel blogs.

Our client and main contact is the owner of the restaurant. Besides the owner, the organization consists of an assistant manager, a chef, three cooks, three servers, two baristas, one bartender, one shopper/maintenance person, and one host as of September 2023. Several staff members of the restaurant are also shared with the café, including the assistant manager, a barista and the shopper/maintenance person. See Figure 1 on page 8 for the organization chart. For our project, our team interviewed eight current and departed employees. See Table 1 on page 8 for our project team.

Figure 1: Client Organization Chart

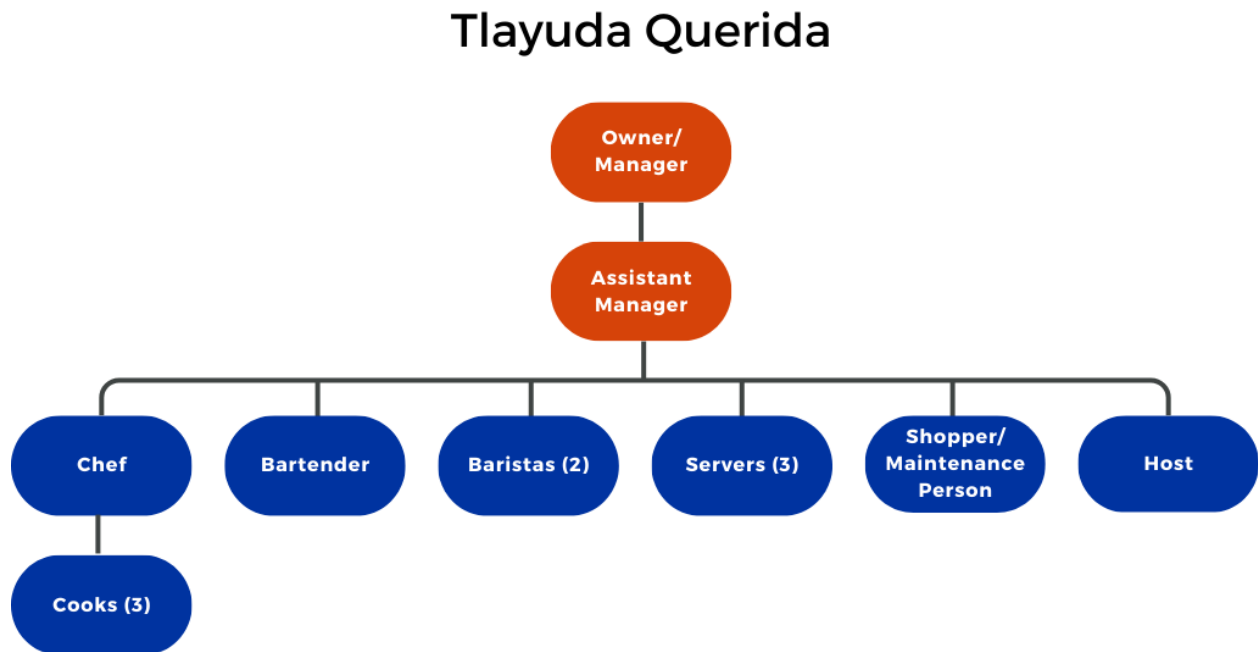


Table 1: Project Team

Needs Assessment Project Team Members	Role
Karyna Mangusheva	Client Point-of-Contact and Project Team Member
Lizzie Merrill	Project Team Member
Adam Minahan	Project Team Member
Roshi Patel	Project Team Member

2.2 Problem and Impact

The restaurant has been struggling with a high turnover rate across all roles. The current willing turnover rate, monthly, is 8.62%. Annually, it is 103.47% (extrapolated from the past 9 months). The desired annual turnover rate is 15-20%. This high turnover rate negatively impacts the business in several ways, which include:

- Lost investment of time and money training employees who leave.
- Insurance is paid for employees for a week after they leave.
- Time and money to hire new employees, onboard and train them.
- In the case of newly hired cooks, a lot of ingredients are wasted during training and the first months of work. In turn, inconsistent food makes customers unsatisfied.
- New cooks and bartenders are much slower in preparing food and drinks, making customers unsatisfied.
- When a new chef is hired, the menu has to be redone and kitchen staff tend to leave as well.
- When a manager leaves, there is a lot of associated staff turnover. In the past year, there have been three managers.

The goal of this needs assessment is to uncover the causes of the high turnover rate to suggest interventions that will lower this rate.

2.3 Data Collection

2.3.1 Planning with Frameworks and Models

During the initial planning stage, we decided to use several performance improvement frameworks and models to complete the needs assessment.

First, we used **Harless' Front-End/Cause Analysis** (Harless, 1973) to determine the gap between desired turnover and current turnover rates based on our previous data collection. Harless created a series of questions that help make a systematic analysis of organizations. By using this analysis model, we were able to identify gaps and to determine our intervention selection suggestions.

Harless' Front-End/Cause Analysis was used to investigate the following:

- Do we have a problem?

- Do we have a performance problem?
- What is the current and desired willing turnover rate? What is the gap?
- What is the turnover of other restaurants in the area?
- What do the owner and supervisor-level employees think the current cause of turnover is?
- Is there data available that indicates general causes for why employees are leaving, and is it being effectively used for decision-making?
- What will happen if the turnover rate is not fixed?
- How will we know if the problem is fixed?
- What is the cause of the turnover? Why do employees leave willingly?
- What evidence bears on each possibility?
- What is the most probable cause?

Next, the team used the organization and process portions of **Rummler & Brache's Nine Boxes Model**. This model guides an examination of three areas within the organization and its processes: goals, design and management. This model helped us determine where the restaurant is as an organization as a whole and also how the company works internally within each team.

Figure 2: Rummler & Brache's Nine Boxes Model

	Goals	Design	Management
Organization	Strategy, operating plans, and metrics	Organization structure and overall business model	Performance review practices and management culture
Process	Customer and business requirements	Process design, systems design, and workspace design	Process ownership, process management, and continuous improvement
Performer	Job specifications, performance metrics, and individual development plans	Job roles and responsibilities, skill requirements, procedures, tools, and training	Performance feedback, consequences, coaching, and support

Reproduced from *The Nine boxes model*. (2020, October 15). RummlerBrache.com.
<https://www.rummlerbrache.com/nine-boxes-model>

Rummler & Brache's Nine Boxes Model was used to investigate the following, drawing solely from the organization and process rows:

- **Organization Goals**
 - What are the organization's goals and what are its strategies to achieve them?
 - Does ownership and management have the necessary data about their employee satisfaction, plans for the future, and comfort doing their jobs to have an informed perspective on whether or not employees will quit and act accordingly?
 - Does management have turnover data and know it's too high?
 - Has the owner developed a strategy and organization-wide goals? Have they been communicated to everyone in the organization?
- **Organization Design**
 - What is the organizational structure?
- **Organization Management**
 - What is the management culture?
 - How does the organization monitor and evaluate performance?
- **Process Goals**
 - Does the business have process-level goals?
- **Process Design**
 - Are there any indications in deficiency in the workplace processes?
- **Process Management**
 - Does the owner obtain regular customer feedback and use it to track performance in relation to their goals?
 - What will happen if the turnover rate is not fixed?

Chevalier's Updated Behavior Engineering Model (BEM) was identified as a useful model for our project due to the wide range of data it can collect. This model focuses on two main factors: the organization's environment and how employees behave within that environment. We were able to create some helpful interview and survey questions based on this model that helped us understand if employees have the necessary information, resources, incentives, knowledge, skills, capacity, and motives to do their jobs properly. This information also helped us uncover reasons for employees leaving the restaurant, as any lack of the above necessities could negatively impact employee satisfaction.

Figure 3: Chevalier's Updated Behavior Engineering Model (BEM)

Environment	Information 1. Roles and performance expectations are clearly defined; employees are given relevant and frequent feedback about the adequacy of performance. 2. Clear and relevant guides are used to describe the work process. 3. The performance management system guides employee performance and development.	Resources 1. Materials, tools, and time needed to do the job are present. 2. Processes and procedures are clearly defined and enhance individual performance if followed. 3. Overall physical and psychological work environment contributes to improved performance; work conditions are safe, clean, organized, and conducive to performance.	Incentives 1. Financial and nonfinancial incentives are present; measurement and reward systems reinforce positive performance. 2. Jobs are enriched to allow for fulfillment of employee needs. 3. Overall work environment is positive, where employees believe they have an opportunity to succeed; career development opportunities are present.
Individual	Knowledge/skills 1. Employees have the necessary knowledge, experience, and skills to do the desired behaviors. 2. Employees with the necessary knowledge, experience, and skills are properly placed to use and share what they know. 3. Employees are cross-trained to understand each other's roles.	Capacity 1. Employees have the capacity to learn and do what is needed to perform successfully. 2. Employees are recruited and selected to match the realities of the work situation. 3. Employees are free of emotional limitations that would interfere with their performance.	Motives 1. Motives of employees are aligned with the work and the work environment. 2. Employees desire to perform the required jobs. 3. Employees are recruited and selected to match the realities of the work situation.

Reprinted from Chevalier, R. (2003). Updating the behavior engineering model. *Performance Improvement*, 42(5), 8–14.

Chevalier's Updated BEM was used to investigate the following:

- **Environment Information**

- Do employees know how their performance is? Are they receiving feedback?
- Are employees aware how they are doing in relation to the goals and metrics for their positions?

- **Environment Resources**

- Do employees have the necessary resources to carry out their jobs well enough to feel confident and not to feel stressed?
- Does ownership and management facilitate capacity to do the jobs by offering flexible scheduling or other accommodations?
- Are there workload or resource issues contributing to turnover?
- Are employees provided adequate tools, materials and reference guides to perform their jobs adequately?
- Do employees feel comfortable discussing problems with supervisors? Does management create a healthy work environment?

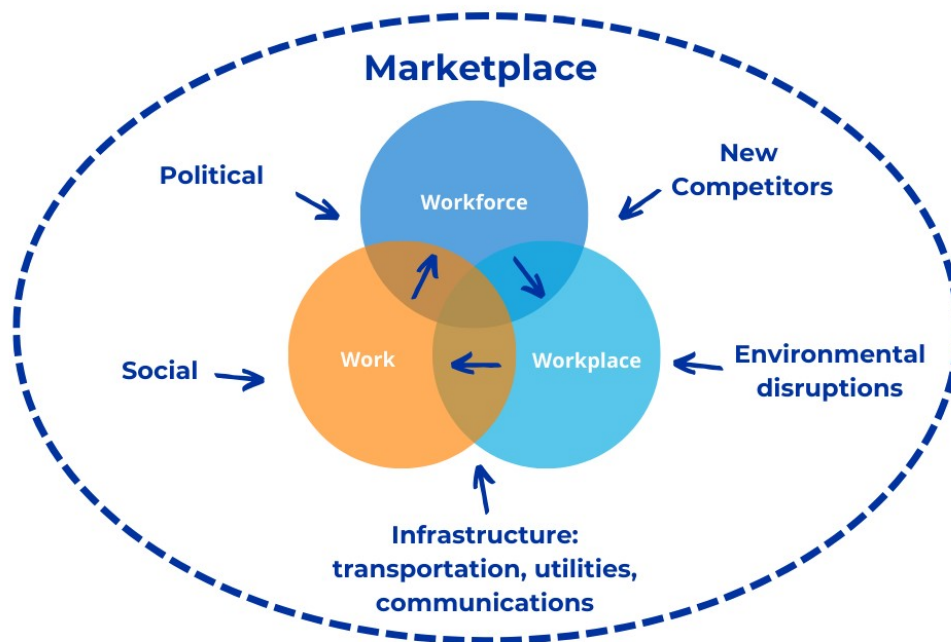
- **Environment Incentives**

- Are managers incentivized to make sure employees are satisfied and want to remain employed with the restaurant?

- Are employees sufficiently incentivized to remain employed with the restaurant?
- Are the compensation, benefits, and work environment attractive enough to retain employees?
- Are employees leaving because the salary compares unfavorably to other similar businesses in the area?
- Does the restaurant support employees' professional development and goals?
- Are employees compensated according to performance and time worked with the restaurant?
- **Individual Knowledge/Skills**
 - Are employees adequately trained and skilled to perform their roles effectively?
 - What training is being provided to employees when first joining?
 - Are employees leaving because they don't have the adequate experience and knowledge to perform their jobs?
- **Individual Capacity**
 - Do employees have the intellectual and physical capacity to do their jobs? Do they leave because they feel they cannot handle the work?
- **Individual Motives**
 - What motivates employees to leave? Are there issues related to job satisfaction, workplace culture, or personal reasons?
 - What motivates some employees to return to the restaurant after leaving?
 - What are employees motivated by? Are those things being offered to employees as incentives to stay with the company?

Finally, we utilized **Judith Hale's Dynamics of Performance** (Boise State OPWL, 2020) to conduct an environmental scan to review factors that could be affecting the organization internally and externally.

Figure 4: Judith Hale's Dynamics of Performance



Reproduced from Boise State OPWL. (2020, October 6). *Useful questions for starting a project and conducting an environmental scan* [Video]. YouTube.
<https://www.youtube.com/watch?v=GMHT5U9HwmE>

It focuses on marketplace factors, including competition, environmental disruptions, infrastructure, social, and political. By utilizing this model we were able to uncover a significant amount of external factors affecting the restaurant. Our use of this model was to answer the following: How does the “marketplace” (political, social, infrastructural, environmental and competition factors) impact the performance of the organization?

Additionally, because willing attrition is ultimately prompted by personal factors for each individual, we investigated the following questions which did not fit into any framework or model:

- What do employees (current and former) recommend that could be done better in the restaurant to improve employee satisfaction and the business as a whole?
- Do employees have a good work-life balance? Does work affect their personal lives?

2.3.2 Informed Consent and Confidentiality

During the data collection process, we met ethical due diligence standards by respecting the following:

- **Informed Consent-** All interview participants in the project received an informed consent form (see Appendix C). We procured signed or verbal agreements from all participants prior to interviewing them.
- **Confidentiality-** Throughout the project we protected the privacy of the client and all participants involved. We used a pseudonym for the client name to protect them and their business.

2.3.3 Interviews

We started the needs assessment with a structured interview with the owner of the restaurant. We chose a series of questions across three frameworks - Chevalier's Updated Behavior Engineering Model, the Rummler & Brache's Nine Boxes Model, and Harless' Front-End/Cause Analysis. From the responses, we were able to focus all further interview questions.

To gather additional data, we conducted an unstructured interview with the owner to construct a list of employees who worked at the restaurant any time between December 2022 to September 2023. From this data, we were able to calculate an average willing turnover rate. We chose to exclude employees who left unwillingly because the owner indicated that he is unsatisfied with the willing turnover rate specifically. Then, we calculated an extrapolated annual turnover rate.

Additional unstructured interviews with the owner took place that helped us obtain information needed for Judy Hale's Dynamics of Performance model. This environment pertains to the marketplace that the restaurant operates within and governmental and economic factors that impact its performance in the marketplace.

Once we had the data on the turnover rate, we began conducting structured interviews using our frameworks and models to learn more about employee performance and satisfaction. We interviewed seven employees, including five current and two former employees.

After we completed all interviews with the employees, we had a final interview with the owner and supervisor to confirm our preliminary findings and gain further insight on limiting factors that would impact our proposed interventions.

2.3.4 Surveys

The final step of our data collection was distributing a survey to current and former employees. The purpose of our survey was to confirm our preliminary intervention choices and to better rate them by their necessity and potential efficacy.

The survey asked employees to indicate their length of employment at the restaurant and their positions so we could find potential trends in responses based on these two factors. However, nothing substantial was discovered.

Due to a finding during an interview, we asked employees how prepared they felt in the event of an emergency, such as earthquakes, fires and physical altercations.

We also asked them to rate their level of agreement with several statements that had to do with our preliminary interventions. We used a 5-point Likert scale with options ranging from “Strongly Disagree” to “Strongly Agree.”

These helped us rate and rank the interventions. These statements are:

- The on-the-job training provided at the beginning of my employment prepared me to do my job well.
- I am satisfied with the career advancement opportunities available for me.
- Expectations and performance standards are clear and fair.
- I get regular feedback on my performance.
- The managers treat the employees with respect.
- I know how I can receive a raise, bonuses, and other benefits.
- Communication between team members (including across departments) is good
- I know what I should be doing during downtime.

We asked the survey participants to rank six different criteria on their level of importance from “Most Important” to “Least Important.” These six criteria were drawn from the six preliminary interventions related to improving employee satisfaction. With this information, we were able to better rate each intervention in terms of their necessity and potential efficacy. These criteria are:

- Managers treat employees respectfully
- A strong onboarding and training program
- Professional development opportunities (ability to cross train, classes that the employer pays for, etc.)
- Clear job expectations and performance reviews
- Knowing how and when I can receive raises and bonuses

- Clear communication between team members and different departments

The survey was created using Google Forms. It was sent to seven current employees and two former employees. We received a total of five responses from current employees and two from former employees, giving us a 77.78% response rate. We requested the assistant manager to distribute the survey to all current employees but she only distributed it to seven because two employees quit and others were not immediately available to participate in the survey. One response was not included in our analysis because the participant marked the first option for every question. We categorized this as invalid data due to careless responses.

The survey data helped back our initial findings in the interviews and make necessary adjustments.

2.4 Organizational Scan

We carried out an organizational scan using Rummler & Brache's Nine Boxes Model in order to understand the organization's goals and structure. This helped us with our gap and cause analyses and our intervention selection.

Table 2: Organization Analysis with Rummler & Brache's Nine Boxes Model

Organization Goals	Organization Design	Organization Management
→ Sales goals for food and drinks (based on owner's estimates) → Customer feedback goals → Recognition by an outside authority to attract more customers	→ Simple, almost flat hierarchy → No department managers or lead roles	→ Some sub-goals exist, but not communicated with employees → Performance based on organization goals is not tracked → Resources are tracked and prioritized according to needs

Process Goals	Process Design	Process Management
→ Process goals exist for some departments	→ The management team is continually working on process improvements → An inventory tracking system has been implemented	→ Some process sub-goals exist, but not communicated with employees → Performance based on process goals is not tracked → Not enough resources (staff, tools) for the most efficient cooking process and customer service delivery

Organization Goals

The organization and process levels of the Rummer and Brache's Nine Boxes Model were used to analyze the organization. Information was obtained through interviews with the owner, supervisor and the employees.

The owner provided the following sales goals, based on estimates of current sales:

- 40,000 MXN sales of food and drinks on Friday/Saturday nights (current is 20,000 MXN)
- 80 people served for dinner on Friday/Saturday nights (current is 45)
- 1,000 MXN bill per person on average on the weekends (current is 500 MXN)
- 15,000 MXN sales of food and drinks on other nights (current is 10,000 MXN)

Additionally, the owner has a customer service-related goal: to obtain a feedback rating of 4.8 out of 5.0 stars on Google Reviews (current is 4.5 stars). Finally, the owner aims to be listed in the top restaurants of Mexico (la Guía México Gastronómico). This goal is related to attracting more customers.

Organization Design

Since the organization is small, it has a simple, almost flat hierarchy. There are currently no department managers or lead roles, except assistant manager and the chef in the kitchen.

Organization Management

Some sub-goals exist, but through interviews, we found that they were not communicated to employees. Performance related to the sub-goals is not tracked. The owner and supervisor work together to track and prioritize resources for the restaurant, but their efforts are limited to certain aspects.

Process Goals

Process goals exist for some departments. For example, the owner stated a goal of preparing the dishes within ten minutes of receiving the order in the kitchen.

Process Design

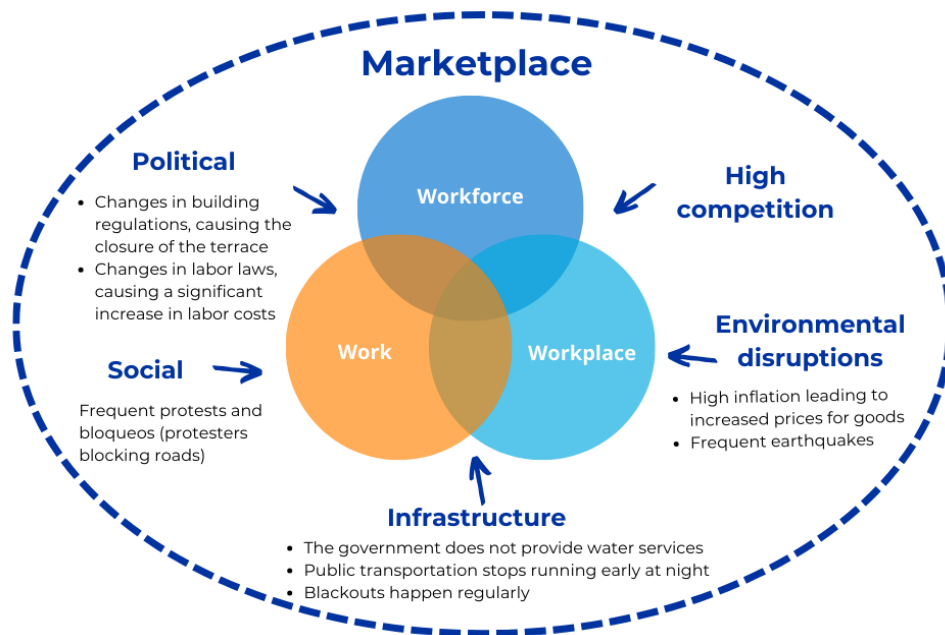
The management team has been working on process improvements in the restaurant for the past several months. For example, an inventory tracking system was implemented in the last three months.

Process Management

Through interviews, we found that employees are not aware of process-level goals. Performance related to process goals is not tracked. There are not enough staff and tools for the most efficient cooking process and customer service delivery.

2.5 Environmental Scan

Figure 5: Environment Analysis with Judith Hale's Dynamics of Performance



Reproduced from Boise State OPWL. (2020, October 6). *Useful questions for starting a project and conducting an environmental scan* [Video]. YouTube. <https://www.youtube.com/watch?v=GMHT5U9HwmE>

Through unstructured interviews with the owner, we uncovered significant environmental (marketplace) factors that affect the restaurant's performance. We used Judith Hale's Dynamics of Performance model to analyze these factors.

Political Factors

Due to changes in regulations regarding terraces in the Centro neighborhood, the top floor of the restaurant was closed for renovations from March to April. These repairs were costly and the restaurant lost business because customers prefer the terrace to the lower level. Furthermore, the regulations were not applied evenly to all restaurants due to corruption, giving some competitors an advantage.

Additionally, there were significant changes in labor laws that affected the restaurant. Starting from January 1, 2023, the minimum wage increased from 160 to 220 MXN per day (an almost 40% increase), the price of insurance increased from 2,500 to 3,500 MXN per person per month (a 40% increase), the minimum number of paid vacation days increased from 6 to 12 days (a

100% increase), and finally, the pay for working on holidays increased from double to triple the usual rate. These changes affected the profits of the restaurant and limited the size of the restaurant team.

Social Factors

Oaxaca de Juárez has frequent protests and bloqueos, where protestors block roads. This makes it difficult for employees to arrive to work, interferes with shopping to stock the restaurant and deters customers.

Infrastructure Factors

The local government does not provide water services, so the restaurant uses private water services. Occasionally, the restaurant runs out of water when the private water services do not deliver, such as on Sundays or holidays.

Furthermore, public transportation stops running early in the evening, although the restaurant is open past midnight. Consequently, employees who work at the restaurant must own a vehicle, limiting the candidate pool when hiring.

Finally, the electrical power grid suffers regular blackouts, especially during the rainy season and after earthquakes. These problems occur throughout Oaxaca de Juárez.

Competitors

The desirable location of the restaurant means intense competition from other restaurants and bars.

Environmental Factors

Like other countries, Mexico experienced high inflation this year. From January to May, the prices for goods went up 25%, compared to last year's prices. The inflation has since decreased to 10%. This affected the restaurant's ability to stock the kitchen and led to an increase in the prices on the menu.

Due to its location in a seismic zone, Oaxaca de Juárez suffers from frequent earthquakes. The buildings in the Centro neighborhood are historical and not built to modern standards for seismic zones. Earthquakes cause damage to buildings, blackouts and customers leaving due to fear.

3. Gap Analysis

The information for the gap analysis was obtained through interviews and a survey. Two primary models were used to conduct the gap analysis: Harless' Front-End Analysis and Chevalier's Updated Behavior Engineering Model.

Harless' Front-End Analysis:

Harless' Front-End Analysis aims to answer the following questions:

1. Do we have a problem?
2. Do we have a performance problem?
3. How will we know when the problem is solved?
4. What is the performance problem?
5. Should we allocate resources to solve it?

Based on our initial interview with the owner, the main problem is the high turnover rate. The current willing turnover rate, monthly, is 8.62%. Annually, it is 103.47% (extrapolated from the past 9 months). The desired annual willing turnover rate stated by the owner is 15-20%. The gap for annual willing turnover rate is 83.47-88.47%. According to the owner, there is no data on why employees are leaving but the owner would like to allocate resources to solve this problem. It was not possible to obtain information from other restaurants in the area or comparable areas in the U.S. to determine if the turnover rate is higher than the average¹.

Table 3: The Gap

	Target Population	Annual Turnover	Standard
Desired Willing Turnover	Restaurant employees	15-20%	Unable to acquire appropriate data
Actual Willing Turnover		103.4%	

¹ According to the National Restaurant Association (2023), the average monthly willing turnover for the Accommodations and Food Services sector in the U.S. was 5.8% during 2021-2022. However, since there are significant economic, political and cultural differences between the U.S. and Mexico, it is not appropriate to use a U.S. turnover rate to assess if the client's turnover rate is atypical.

Chevalier's Updated Behavior Engineering Model

Using Chevalier's Updated Behavior Engineering Model, a gap analysis of each of the six categories was conducted. This helped us find possible issues at the environmental and individual levels.

Table 4: Gap Analysis with Chevalier's Updated Behavior Engineering Model

Environment: Information	Environment: Resources	Environment: Incentives
→ Employees not aware of performance or restaurant goals → Performance expectations are not clear → Job aids are not available	→ Basic tools are available → Not enough staff → A former manager contributed to a poor working environment	→ Pay is the same or higher than other restaurants in the area → Health insurance and overtime pay is provided → Not a lot of career advancement opportunities available → Most employees are happy with the working atmosphere
Individual: Knowledge/Skills	Individual: Capacity	Individual: Motives
→ Most employees receive on-the-job training or shadow an experienced employee → Some cross-training occurs → There is a lack of regular safety training	→ Carrying food and drinks from the kitchen to the terrace is physically demanding → During busy period, servers have to take care of many customers → Employees stay extra hours to complete their duties	→ The top motivations of employees are learning new things and pay to support their family

Information

Employee interviews revealed:

- Employees don't know about specific goals for roles and the restaurant as a whole.
- They stated that expectations and standards should be more clear and posted somewhere to see easily.
- There is no handbook or manual for the restaurant.
- There is no formal performance feedback process.
- During downtime, employees feel like they don't know what to do and things are aimless. They feel that they get behind during a rush because they didn't properly prepare during downtime.

Resources

Employee interviews showed that they feel they have enough to do their jobs but there are some tools missing that would make their job easier, including:

- A longer bar with more space
- Extra freezer
- More strainers
- An extractor in the kitchen (there is currently no extractor)
- Better ventilation in the kitchen

Employees stated that a former manager contributed to a poor working environment.

Employees also indicated a lack of supporting staff. More staff could assist with issues such as meals being rushed or employees missing details.

Incentives

Employee interviews showed:

- Most employees are very happy with their pay, especially because of tips and overtime.
- Employees seem to be unaware of the possibility of salary raises after one year of employment.
- No additional courses or training is supplied to employees - however, in one instance an employee asked about taking classes about a skill relevant to the job and was able to get partial financial reimbursement. This is not provided equally to all employees.
- Health insurance is provided as per the law, which is not always the case in other restaurants in the area.

- The work environment varies - most employees are happy with the atmosphere, but kitchen staff indicated that the kitchen lacks ventilation and is hot and smelly.

Motives

In interviews, employees stated that they are motivated by:

- Salary to support their family (good pay and paid overtime): 57% (n=4)
- Learning new things: 57% (n=4)
- Freedom/creativity in their role: 29% (n=2)
- Returning customers (they are proud of their work): 14% (n=1)
- Interacting with tourists: 14% (n=1)

Despite a high percentage being motivated by learning new things, some employees mentioned lack of advancement, or not growing their personal and professional skill set.

Capacity

Employee interviews showed:

- Walking up and down the stairs carrying heavy trays is tiring. Servers must climb up and down stairs throughout their shift, carrying heavy loads because the kitchen is on the lower level, while the rooftop (the most popular part of the restaurant) is at the top level.
- Some employees have indicated the need for a runner to help them. Several employees have outright stated they would like more employees because between 3-4 servers take care of 20 tables with 80 guests at a time.
- The chef has stated that he does not have enough hours to finish his work, although he often stays late on busy days.

Knowledge/Skills

Employee interviews showed:

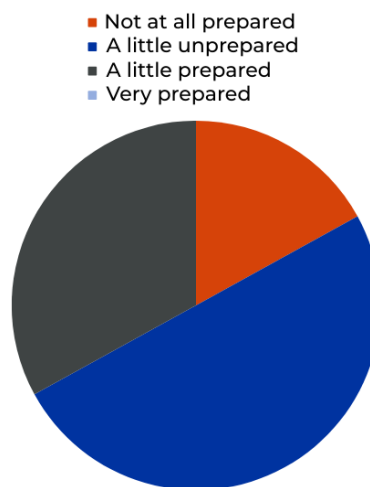
- Some employees feel there should be more structured training.
- The only training currently being provided to servers is for about 1-2 days by the most experienced server. Training consists of shadowing only.
- One employee received no training or tour at all.
- One employee indicated a lack of safety training (natural disasters, fires and physical altercations).

Survey results confirmed a lack of safety training:

- No respondents felt “very prepared” in the event of an emergency, such as an earthquake, fire or fight.
- 33.33% of respondents (n=2) felt “a little prepared”
- 66.67% of respondents (n=4) felt “a little unprepared” or “not prepared at all.”

Figure 6: Survey Results for Emergency Preparedness

How prepared do/did you feel in the event of an emergency (earthquake, fire, fights, etc.)?



Survey results were mixed about whether on-the-job training adequately prepares employees for their job. This indicates a lack of consistency across departments.

Conclusion

Using Harless' Front-End Analysis, we identified a gap in the turnover per the owner. We then used Chevalier's Behavior Engineering Model to find several issues at the environmental and individual levels, with most issues coming from the former. Notable items include the lack of a handbook, the physical demand of the job/lack of employees, and lack of additional training. With our cause analysis, we will see if these issues are the cause of employee dissatisfaction and therefore the turnover rate in the restaurant.

4. Cause Analysis

Using interview and survey data to conduct the cause analysis, the team utilized two models: Harless' Cause Analysis and Chevalier's Updated Behavior Engineering Model.

Harless' Cause Analysis

Using the data collected during the gap analysis, the team answered a few questions in Harless' Cause Analysis.

What is the cause of the turnover? Why do employees leave willingly?

- Some employees mentioned lack of advancement, or not growing their personal and professional skill set.
- Two former employees stated that a former manager was a bully, a thief, and created a toxic work environment. She has since been fired.
- Several current employees stated that the former manager created a bad working environment.
- Employees are not unaware of the possibility of salary raises.
- The kitchen has been described as lacking ventilation and having a smell. This may contribute to the kitchen having the highest turnover rate in the restaurant.
- There is variability in certain benefits people receive, such as flexibility of scheduling, raises and reimbursement for personal development.
- Some employees stated that they work a lot and until very late and that they do not have a good work-life balance.
- Another possibility is that employees feel overwhelmed due to:
 - The physical demand of carrying food and drinks up and down stairs
 - A lack of formal onboarding and training
 - Working many hours and having a poor work-life balance
 - Not being prepared for rush hour stemming from relaxing during downtime
 - Poor communication between teams
 - Not having enough supporting staff

What evidence bears on each possibility?

- Employee statements and survey results.
- Strongest evidence is directly from those said they left due to poor management (the manager has since been fired).

What are the most probable causes?

- Poor management
- Not enough onboarding or periodic training
- Lack of structure during down time
- Poor communication between departments
- Lack of knowledge about how employees can obtain raises and promotions

Chevalier's Updated Behavior Engineering Model

We further analyzed our findings according to Chevalier's Updated Behavior Engineering Model to find possible causes for high turnover.

Data/Information

Although there is no formal performance evaluation process in place, 100% of employees (n=6) indicated in our survey that they were given regular feedback on their performance. In interviews, employees stated that they received verbal praise for good performance. A lack of job aids and a manual may contribute to the feelings of overwhelm among employees. Poor communication across departments may also create frustration for some employees.

Instruments/Resources

Generally, employees are satisfied with the working environment. One hundred percent (n=5) of current employees stated in interviews that the working environment is respectful and/or has a family atmosphere. However, kitchen conditions may cause dissatisfaction among kitchen staff. The lack of supporting staff may contribute to overwork and poor work-life balance among employees. Forty-three percent (n=3) interviewed said that the working schedule impacts their personal life negatively due to a lack of work-life balance.

Seventy-five percent (n=3) of current employees interviewed who worked while the former manager was in charge mentioned that the manager created a bad work environment. Furthermore, 100% of former employees (n=2) interviewed mentioned the former manager as one of the reasons for leaving.

Incentives

Compensation is not likely a contributing factor to turnover. However, employees are not aware of raises based on time employees, which could potentially incentivize them to stay employed longer. Other incentives, such

as reimbursement for skill development, is not available to all employees. This may cause frustration among employees.

Motives

One hundred percent (n=5) of current employees who were interviewed were satisfied working at the restaurant. Considering that most employees are motivated by learning new things, the lack of continuing training could be one of the reasons for turnover.

Capacity

Our study did not find that the employees' capacity to do their work caused dissatisfaction. However, a lack of supporting staff may contribute to overload and a lack of work-life balance.

Employees desire to do their work and they understand the realities of their work before they are hired.

Knowledge/Skills

A lack of onboarding and ongoing training may contribute to employees feeling frustrated, overwhelmed and overworked.

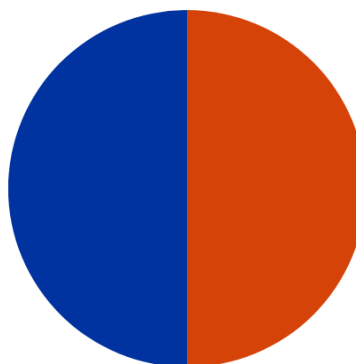
Although it is not a direct factor in employee turnover, we have found that employees do not feel prepared for emergency situations. This can have legal and financial consequences for the client.

Figure 7: Survey Results for Important Workplace Factors

Please rank each criterion by their importance in the workplace.

#1 or #2 Choice

- Managers treat employees respectfully
- A strong onboarding and training program
- Professional development opportunities
- Clear job expectations and performance reviews
- Knowing how and when I can receive raises and bo...
- Clear communication between team members an...



In our survey, we asked employees to rate six criteria according to their importance in the workplace. Half of the respondents selected “Managers treat employees respectfully” as a first or second choice. This further supports our finding that the former manager is a primary cause for high turnover. The other half of the respondents selected “Professional development opportunities” as a first or second choice. This further supports our finding that the lack of additional training is a contributing factor to turnover.

Conclusion

The key finding of the cause analysis shows that a poor manager was a key reason for turnover in the past eight months. Furthermore, there is a mismatch between the employees’ strong motivation for professional development and the lack of continuous training offered by the restaurant. Additional factors that may contribute to turnover include no onboarding or formalized training, a lack of structure during down time, a lack of knowledge about raises and promotions, poor communication across departments and inadequate staffing. These key findings have helped us formulate recommendations to help the restaurant prevent high turnover.

5. Intervention Selection

5.1 Identifying Interventions with a SWOT Analysis

After collecting and analyzing our data, we used a SWOT analysis to categorize the data into Strengths, Weaknesses, Opportunities, and Threats. Our findings from the Gap and Cause Analyses fill the Weaknesses quadrant, while other information found in our Organizational and Environmental Analyses helped us fill in the Strengths, Opportunities, and Threats quadrants. After analyzing the Strengths, Weaknesses, and Opportunities quadrants, we were able to identify some possible interventions. Four of our interventions come from the Weaknesses quadrant, one comes from the threats quadrant (better management hiring/monitoring), and one comes from the Opportunities quadrant (professional development opportunities). All four quadrants will help us with our Multicriteria Analysis.

Table 5: SWOT Analysis for Intervention Selection

<i>SWOT Analysis</i>	
Strengths	Weaknesses
→ The restaurant is making a profit in a very competitive market → Most employees are very happy with their compensation → Most employees get along well with each other and say the restaurant is like a family → The restaurant has most of the tools needed for employees to perform well → Employees feel comfortable bringing problems to the current management. → Current management is supportive. → Employees get verbal feedback for work done well	→ Not much training for new hires or current employees (management) ◆ Lack of onboarding ● Lack of a manual or job aids ◆ Lack of emergency situations training → No structured system for feedback, promotions, or bonuses (management) → Downtime is not used in a productive manner (workers) → Lack of regular team meetings and communication, specifically across departments (management & workers) → The restaurant doesn't keep data on employee performance or costs related to turnover (e.g., costly mistakes due to newly/poorly trained staff, costs to find new

	employees and interview them, costs of insurance paid for two weeks after employees leave, etc.) (management)
Opportunities	Threats
→ Employees like learning new skills and roles so they are open to being cross-trained ◆ Use downtime as an opportunity to cross-train → If possible, buy recipes from outgoing chefs to keep the menu consistent → Continue advertising insurance and other benefits on job postings → Staff generally gets along with each other, so promoting from within might be beneficial as they will likely trust and get along with their new supervisors → The restaurant is pretty well known and is often used as an Instagram photo stop for tourists, so take advantage of that to gain more customers ◆ Can encourage these people to post positive reviews on social media platforms → Continue to introduce new menu items and specials ◆ Set a schedule for monthly specials ◆ Use social media to promote specials ◆ Train staff on upcoming specials to help sell to customers	→ Political instability that can lead to unexpected and costly regulations → Recent 40% increase in both the minimum wage and the insurance → 100% increase in vacation days from 6 to 12 → Change in holiday pay from 2x to 3x → Frequent protests and bloqueos in the area make it difficult for employees to get to work, shopping to be done, etc. → Need to use private water service, which is inconsistent → Frequent earthquakes which can cause blackouts and damage the building → Since there was previously a toxic manager, the possibility of hiring another one is a threat

5.2 Evaluating the Interventions with a Multicriteria Analysis

After analyzing the Weaknesses quadrant in our SWOT analysis, we identified needs that warranted interventions. Analyses of the Strengths and Opportunities quadrants helped us arrive at possible interventions. Next, we used a Multicriteria Analysis to analyze their

Necessity, Efficacy, Affordability, and Feasibility. First, we did a preliminary analysis by each team member individually rating each criterion and then calculated the average of those ratings. Next, we interviewed management again and distributed an employee survey to collect more data. The questions for both the interview and the survey were constructed using our selected interventions as a guide. This data confirmed or conflicted with our interventions and helped us to more accurately rate the criteria in our Multicriteria Analysis. We adjusted our ratings according to these new findings.

Table 6: Multicriteria Analysis for Intervention Selection

<i>Multicriteria Analysis</i>					
Selected Intervention	Necessity Rating 1-10	Efficacy Rating 1-10	Affordability Rating 1-10	Feasibility Rating 1-10	Average Rating
Onboarding and/or periodic training (includes disaster/safety, roles and expectations, a guided tour, introductions) so employees have the opportunity for improvement and know that the restaurant is investing in them	9	8.75	3.75	5.5	6.75
New approach to hiring/monitoring managers (behavioral interview techniques and/or hiring from within, 360 feedback system on manager performance) so that managers maintain a healthy work environment	7.75	7.5	6.25	6.75	7.06
Regular team meetings with After Action Reports to improve communication and coordination	3	6.75	3.5	3.12	4.01
Establish and clarify performance achievements and time milestones that lead to raises/bonuses so employees know that their efforts are rewarded fairly	5.67	7	5.25	6.5	6.12
Offer professional development opportunities based on roles and	6.75	6.75	2.25	3.75	4.88

make them consistent (50% paid English lessons, training for chefs to make new dishes, etc., cross-train during downtime) to incentivize employees to remain employed with the restaurant					
A team lead or a checklist (that must be initialed as tasks are completed) during downtime to make sure people know what they should be doing	7.25	8.25	8.75	8.75	8.25
Encourage ownership to keep track of increased costs related to turnover vs costs during steady states of employment so that realistic expectations can be set for bridging gaps and setting goals	8.5	8	3.75	3	6.13

5.3 Prioritizing the Interventions

Finally, after rating our interventions on each criterion, we arrived at their average scores. These scores helped us prioritize the interventions that we will present to the client. Our Intervention Priority Chart identifies interventions that address the causes of the gap and explains each intervention type, why the interventions are relevant, and their strengths and weaknesses that informed our Multicriteria Analysis.

Table 7: Intervention Priority Chart for Intervention Selection

<i>Intervention Priority Chart</i>		
Priority	Intervention	Explanation
1	A team lead or a checklist (that must be initialed as tasks are completed) during downtime to make sure people know what they should be doing	Rationale This gap was recognized after several employees stated that many people do not do anything during downtime. Downtime should be used productively. However, that is not what is currently happening. The suggested intervention is to have a checklist during downtime that staff would need to initial as they complete tasks. This will help provide structure

		and productivity to this time. This intervention could help with the current turnover rate, as this has been a complaint among staff. Intervention Type This intervention falls under the “Design” category, more specifically under “interventions that standardize.” Strength The strength of this intervention is that it will not require much financially and is simple to implement as Rene has already made some lists for some departments. It just needs to be done everywhere and used more consistently. In addition, since the employees overwhelmingly see each other as family, they may be intrinsically motivated to help out their “family.” Weakness The weakness of this intervention is the ongoing need to enforce it. It will take time for this to become a standard.
2	New approach to hiring/monitoring managers (behavioral interview techniques and/or hiring from within, 360 feedback system on manager performance) so that managers maintain a healthy work environment	Rationale This intervention was selected due to the poor management being a cause of several employees leaving the restaurant (or otherwise feeling that the work environment was toxic under her leadership). We feel it is necessary since several employees enjoyed working at the restaurant and felt incentivized and motivated except for the poor management at the time that they quit. Intervention Type This intervention is both a “Design” intervention and a “Capacity and Capabilities” intervention. It suggests designing a model for manager selection to make sure they have the capacity to manage employees without creating a toxic work environment that contributes to a high turnover rate.

		Strength The strength of this intervention is that it creates a more positive work environment. Weaknesses Its weakness is that people show their best faces when interviewing, so it might not be able to identify toxic personalities easily. It also doesn't account for the dynamics between individuals that have yet to meet each other.
3	Onboarding and/or periodic training (includes disaster/safety, roles and expectations, a guided tour, introductions) so employees have the opportunity for improvement and know that the restaurant is investing in them	Rationale This gap was identified after individual employee interviews. Most employees stated that they received no formal training when they started working at the restaurant and one employee indicated a lack of safety training. Many employees also indicated that there is confusion about roles and expectations. Intervention Type This intervention falls under the "Information" category. It is relevant to the project because an onboarding process will help to define roles and expectations, make new employees feel welcome, and ensure that employees stay safe while working. Strengths The strength of this intervention is that it could be a very effective way to target most of the "information" issues at the restaurant. It can also prevent employee injuries and protect the restaurant from lawsuits related to employee safety. In addition, employees will appreciate knowing that management is investing in them, which may positively impact attrition. Weakness The weakness is the time and monetary cost - no current onboarding exists, so materials have to be created, someone needs to be trained to help onboard employees, and time needs to be spent onboarding all future employees.

4	Encourage ownership to keep track of increased costs related to turnover vs costs during steady states of employment so that realistic expectations can be set for bridging gaps and setting goals	Rationale The restaurant does not keep data on many important aspects of the business including employee performance and increased costs related to turnover (e.g., costly mistakes due to newly/poorly trained staff, costs to find new employees and interview them, costs of insurance paid for two weeks after employees leave, etc.). This has made it difficult for us to identify a financial gap that our interventions can bridge. Having this information would better allow the restaurant to measure the costs of current practices and the costs of interventions to correct those practices. For example, if we could determine the financial costs of not training and onboarding new employees, we could determine how much money could be saved if employees were training and onboarded and that intervention led to a decrease in turnover. Intervention Type This intervention falls into the “Information” category as it documents important information. Strength The strength of this intervention is that it would help the restaurant make sound decisions regarding interventions. Weakness The weakness is that it is time-consuming, which may lead to other costs.
5	Establish and clarify performance achievements and time milestones that lead to raises/bonuses so employees know that their efforts are rewarded fairly	Rationale Several employees have stated that they are unaware that they can receive raises or bonuses or how they can. This is relevant because if employees don’t know how they can improve their financial situation while working in the restaurant, they may seek employment elsewhere. Intervention Type This is an “Information” intervention since it

		informs employees how they can earn more money for good performance. Strength The strength is that employees may be motivated to stay if the raises and bonuses are good. Weakness However, it could be expensive to give more raises and bonuses than they are already giving. Since we don't have the data on the costs associated with high turnover, it is difficult to judge if this intervention will save them money in the long run.
6	Offer professional development opportunities based on roles and make them consistent (50% paid English lessons, training for chefs to make new dishes, etc., cross-train during downtime) to incentivize employees to remain employed with the restaurant	Rationale This gap was recognized when one employee stated that the owner is paying for 50% of his English lessons. However, this is not a standard for all employees. Many employees want to learn and grow more in their roles and in other roles. This intervention is relevant to the project because we believe it will help strengthen the capabilities of the staff and motivate them in their role. As a result, this could improve turnover. Intervention Type This intervention falls under "Capacity and Capabilities," more specifically under "interventions that develop." Strength The strength of the intervention is the ability to develop staff, therefore, strengthening the abilities of the restaurant. Weakness The main weakness of this intervention is its affordability. This can become costly when it is offered to all staff.
7	Regular team meetings with After Action Reports to improve communication	Rationale This gap was identified when some interviewees stated that there is a lack of communication

	and coordination	across teams. One of the suggested interventions is to have regularly scheduled restaurant meetings that could bridge this gap. These meetings will also help be consistent across the restaurant and to better serve customers. Intervention Type This is a “Design” intervention as it helps the team organize their processes and workflow. Strength The strength with this intervention is that the meetings could also assist with some of the other items we found were a gap within the restaurant such as employee recognition, menu changes, discuss reviews and customer service, and a time for all employees to ask questions. Weakness The weakness of the intervention is going to be the feasibility of this and potentially affordability. It could be difficult for all staff to be at the restaurant at the same time and they will have to compensate employees for their additional time to attend the meeting. In addition, the right hand supervisor is already conducting meetings with individual employees.
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6. Limitations and Implications

There were several limitations to the needs assessment.

First, the interviewers conducted most of the interviews in Spanish, which is not their first language. Only the owner of the restaurant was able to speak English during interviews. It is possible that the interviewers missed nuances in the responses or did not generate the best follow-up questions. For virtual interviews, we were able to use closed captions to help bridge the language barrier. This was not possible for in-person interviews.

Second, we were unable to conduct interviews from October 29th to November 7th due to the Day of the Dead holiday in Mexico. Although this shortened the amount of time we had to interview, we were still able to interview all employees who agreed to participate.

Third, one of the team members has a personal relationship with the owner of the restaurant. Interviewees may have been hesitant to share certain information due to this relationship. Since the team member was part of a two-person data collection team, it was not possible to avoid any biases caused by her participation. Other team members could not participate in data collection due to a language barrier.

Fourth, the restaurant has limited documentation and data available to use. This limited the data we were able to analyze because reconstructing data through interviews or collecting sales data is a time-intensive process.

Fifth, we could not find a typical turnover rate in either Oaxaca specifically or Mexico more broadly. We tried to find data from border towns in the U.S. but were unsuccessful. We did find the average monthly willing turnover for the Accommodations and Food Services sector in the U.S., which was 5.8% during 2021-2022. However, since there are significant economic, political and cultural differences between the U.S. and Mexico, it is not appropriate to use a U.S. turnover rate to assess if the client's turnover rate is atypical. Therefore, it was not possible to claim that our interventions would help the restaurant reach a concrete willing turnover rate.

Sixth, two former employees could not be contacted at the owner's request because one employee left on bad terms and the other had a personal

relationship with him. We may have missed valuable information by not gaining perspectives from employees who left on bad terms. However, there is a possibility that their experience is an outlier and inconsequential to data analysis.

Seventh, there were issues with virtual data collection. Some of the interviews had bad reception and connection problems. One interviewee chose to send voice notes due to a bad connection. The responses were lengthy and questions had to be cut down to save time.

Despite these limitations, our team feels confident that our findings and recommendations would help improve the restaurant's turnover rate and performance.

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8. Appendices

8.1 Appendix A: Codebook and Data

A.1 Code Key

Framework/Model	Category Code	Explanation (code ending with + denotes a positive response to this criteria; - denotes a negative response)
Chevalier's Updated Behavior Engineering Model	BEM-ENV-INF+ BEM-ENV-INF-	Environmental-Information Performance standards and role expectations are clearly defined and understood by the employees; they are given frequent, clear, and fair feedback about their performance; guides for workplace processes are available (job aids); management facilitates excellent employee performance and contributes positively to employee satisfaction
	BEM-ENV-REC+ BEM-ENV-REC-	Environmental-Resources Employees have the tools and resources they need to do their jobs adequately; processes and procedures are clearly defined and understood; work environment contributes to physical and psychological well-being; work conditions are clean, safe, organized, and facilitate adequate performance and contribute positively to employee satisfaction
	BEM-ENV-INC+ BEM-ENV-INC-	Environmental-Incentives Employees are financially and non-financially incentivized to continue working with the restaurant; working at the restaurant helps employees' personal and professional growth; the work environment is positive and employees see positive benefits from working in the restaurant
	BEM-IND-KnS+ BEM-IND-KnS-	Individual-Knowledge/Skills Employees have the necessary skills and knowledge to perform their role;

		individuals are placed in the appropriate positions based on their knowledge/skills; ability to learn and train if they are lacking in knowledge/skills; employees are cross-trained
	BEM-IND-CAP+ BEM-IND-CAP-	Individual-Capacity Aptitude, knowledge, intelligence, and skills of the individual are appropriate for the position; employees have the aptitude and physical ability to perform expected tasks; employees are free of emotional limitations that impact job performance
	BEM-IND-MOT+ BEM-IND-MOT-	Individual-Motives Employees feel motivated to complete their responsibilities; individual motives match the realities of the position; employees are willing to perform their duties to work toward incentives available to them; the employer recruits based on the employees' motivation to do their jobs
Rummler & Brache's Nine Boxes Model	9B-ORG-GO+ 9B-ORG-GOA-	Organization-Goals External threats and opportunities have been identified; internal weaknesses and strengths have been identified; organization-wide strategies and goals are developed and clearly communicated to all staff; specific financial goals are set and how they will be tracked
	9B-ORG-DES+ 9B-ORG-DES-	Organization-Design The organization has created a structure that enables processes and goals to be met; all necessary functions are in place; the organizational structure is the most efficient and effective; it has been determined what is needed to achieve a competitive advantage
	9B-ORG-MAN+ 9B-ORG-MAN-	Organization-Management The organization is considered as a whole when planning and allocating resources; regular feedback is collected from customers to track performance of employees; management resolves conflict to establish effective communication across all teams

	9B-PRO-GO+ 9B-PRO-GO-	Process-Goals Goals for processes that touch the external customer are linked to organizational goals; goals for internal processes are linked to the needs of people within the organization
	9B-PRO-DES+ 9B-PRO-DES-	Process-Design Processes have been designed to enable the process goals to be met efficiently
	9B-PRO-MAN+ 9B-PRO-MAN-	Process-Management Infrastructure for monitoring and improving core processes, including: managing goals, performance, resources and the cross functional space which links processes together
Judith Hale's Dynamics of Performance	DoP-MAR-POL+ DoP-MAR-POL-	Marketplace-Political How does the local political situation impact employee retention? How would it impact the implementation of identified interventions?
	DoP-MAR-SOC+ DoP-MAR-SOC-	Marketplace-Social How do the social climate and cultural factors impact employee retention? How would they impact the implementation of identified interventions?
	DoP-MAR-INF+ DoP-MAR-INF-	Marketplace-Infrastructure How does the local infrastructure impact employee retention? How would it impact the implementation of identified interventions?
	DoP-MAR-ENV+ DoP-MAR-ENV-	Marketplace-Environmental Disruptions How does the environment impact employee retention? How would it impact the implementation of identified interventions?
	DoP-MAR-COM+ DoP-MAR-COM-	Marketplace-Competitors How do competitors impact employee retention? How would they impact the implementation of identified interventions?

Harless' Front-End Analysis	HAR-PER-PRO	What is the (performance) problem?
	HAR-PRO-SOL	How will we know when the problem is solved?
	HAR-PRO-CAU	What is the probable cause?
	HAR-SOL-CON	What are the constraints on proposed solutions?
Multicriteria Analysis	MC-NEC+ MC-NEC-	Is the intervention necessary to improve retention at the organization?
	MC-EFF+ MC-EFF-	How effective would the intervention be at improving retention at the organization?
	MC-AFF+ MC-AFF-	How affordable is the intervention?
	MC-FEA+ MC-FEA-	How feasible is the intervention to implement, given the organization and its environment?
SWOT Analysis	SWOT-ST	The organization's strengths
	SWOT-WE	The organization's weaknesses
	SWOT-OP	Opportunities for the organization
	SWOT-TH	Threats for the organization
Interventions (taking a 2nd look based on final interview with management and survey data)	TL-CHK+ TL-CHK- TL-CHK/	A team lead or a checklist (that must be initialed as tasks are completed) during downtime to make sure people know what they should be doing
	HR-MAN+ HR-MAN- HR-MAN/	New approach to hiring/monitoring managers (behavioral interview techniques and/or hiring from within, 360 feedback system on manager performance) so that managers maintain a healthy work environment
	ONB-TRN+	Onboarding and/or periodic training (includes disaster/safety, roles and

+ supports our conclusion - conflicts with our conclusion / is neutral or inconclusive	ONB-TRN- ONB-TRN/	expectations, a guided tour, introductions) so employees have opportunity for improvement and know that the restaurant is investing in them
	TM-MT+ TM-MT- TM-MT/	Regular team meetings with After Action Reports to improve communication and coordination
	RS-BNS+ RS-BNS- RS-BNS/	Establish/clarify performance achievements and time milestones that lead to raises/bonuses so employees know that their efforts are rewarded fairly
	DT-TRK+ DT-TRK- DT-TRK/	Encourage ownership to keep track of increased costs related to turnover vs. costs during steady states of employment so that realistic expectations can be set for bridging gaps and setting goals
	PRF-DEV+ PRF-DEV- PRF-DEV/	Offer professional development opportunities based on roles and make them consistent (50% paid English lessons, training for chefs to make new dishes, cross-train during downtime) to incentivize employees to remain employed with restaurant

A.2 Interview Results

<i>Interviewee #1 - Current Employee - Server</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
“It has been a unique experience because René has given me an opportunity and I hope I never let him down. He trusts in my work, he trusts that I like sales, secondly I also work out of necessity because I like it and to achieve various goals that maybe in other places I could not do like here because of the economy. So that's why I always work hard and I value the work that René gives us and offers us because at the end of the day, I have and I manage [...] the better René does, the better I do, so I always try to sell sell sell sell.”	Interviewee feels that the manager trusts them. Interviewee does not want to let the manager down. Interviewee works out of necessity. Interviewee feels the better the restaurant/manager does, the better they do.	BEM-IND-MOT+ SWOT-ST SWOT-OP
“I feel that it is part of me so that I can also get my schedule, because if I have any problem, any need they are flexible with me. But even when they need me I am also there to support them. As it has been reciprocal, what we do on both sides has been reciprocal, but as long as there is communication, there is ... well, I also support them, it's mutual.”	Interviewee says they are flexible with their schedule. The relationship is reciprocal and the support is mutual.	BEM-IND-MOT+ SWOT-ST
“No, René gave me the opportunity to come and follow this project. Why? Because he knows, he knows my goals. He knows the potential I have and that I can make it happen.”	Feels that the manager knows the interviewee's goals and sees their potential.	BEM-ENV-INC+ SWOT-ST
“I feel that I already got, as we say, a big slice of the cake and I think it is valid because that gives me the commitment to myself as a person, to be better every day.”	Interviewee is motivated financially and by being a better person every day.	BEM-IND-MOT+ SWOT-ST SWOT-OP
“It motivates me to know that I come and that someone new will come and that maybe because of the customer service, they will come back	Interviewee is motivated by customers returning and feeling satisfied with the service and the food.	BEM-IND-MOT+ 9B-PRO-GO+ SWOT-ST

again. And that gives me great satisfaction, not that the restaurant is full and I want to see more people, no, but that people come back for the service, for the food.”		SWOT-OP
“Well my salary is a little bit more than some of my coworkers. Why? Because I come to work.”	Interviewee feels that they get paid well, more than others because they work harder.	BEM-IND-MOT+ BEM-ENV-INC+ SWOT-ST
“Yes, I do get my overtime, this one yes, Christmas bonuses. Yes, vacations. We also reached an agreement that some of them I was going to get paid, others I was going to get, so yes, I guess so. I have discussed my needs, as well as the needs of my work”	Interviewee is motivated by Christmas bonus, paid time off, and other needs being met.	BEM-IND-MOT+ BEM-ENV-INC+ SWOT-ST
“Right now because of my time I haven't focused on how to learn more, because I do want to learn about mezcal cocktails, because sometimes they ask me for something, whiskey or something. I don't even know how to serve it. And that's where sometimes I slow them down.”	Interviewee would like more time to learn about the drinks so that they know how to serve them and not cause a slow down.	BEM-IND-KnS- SWOT-WE SWOT-OP
“No, they accommodate me and I am flexible. I have a lot of needs [...], right now I really need more resources, because things happened that I wasn't expecting.”	Interviewee feels that their needs are being met and accommodations are made for them when needed.	BEM-ENV-INC+ SWOT-ST
“They support me at the moment, they give me solution. It's okay, you were wrong. But I try too, not to be wrong. Every day. I try. Well, maybe I made a mistake once, I don't know when I made a mistake, but they do support me, so to speak.”	Managers support the interviewee when they make a mistake and they have a conversation.	9B-ORG-MAN+ SWOT-ST
“We did not receive any equipment. We did have manuals (from the café). Now we lack a manual.”	Interviewee states that the restaurant is lacking a manual.	BEM-IND-KnS- SWOT-WE
“Adriana. She came to divide us, to make it so that we didn't get along with each other, like there was no harmony. Now that my boss is here, we have Deni. She is a very supportive girl.”	Interviewee feels that the previous manager created disharmony, but the current manager is very supportive.	BEM-ENV-INF- BEM-ENV-REC- SWOT-TH

"I am very grateful to René because he has always listened to me too. And when I have felt bad or sad, he is there."	Interviewee feels that the manager is supportive emotionally if they are feeling down.	BEM-IND-CAP+ SWOT-ST
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<i>Interviewee #2 - Boomerang (Left and Came Back) - Bartender</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
"At this job I have more power and freedom in the creation of the drinks. Other jobs have more restrictions on creativity. The openness to experiment and having more input is what makes the other jobs different from this one."	Interviewee is motivated by freedom and creativity in his job; management at Tlayuda Querida allows interviewee freedom to experiment and create whereas other employers do not	BEM-ENV-INC+ DoP-MAR-COM+ SWOT-ST
"What motivates me more than anything is to keep moving forward like this, to keep learning, to be better day by day because I know that this is a place that needs constant evolution. So I have to be the same. It motivates me to keep growing and to be able to grow along with this place."	Interviewee is motivated by personal and professional development; wants to see business grow and succeed and wants to grow along with it	BEM-IND-MOT+ SWOT-ST
"From the different places I've worked, it's good. The salary, yes, truthfully, well just like the others, even better than the others because in the others, in this case the salary is good and they added tips."	The financial compensation is as good or better than the other places the interviewee has worked (especially because of tips)	BEM-ENV-INC+ SWOT-ST SWOT-OP
"Well I think more than raises, is the extras. Because other places in Oaxaca don't pay extras."	Interviewee states Tlayuda Querida incentivizes employees with extras and other places in the area do not	BEM-ENV-INC+ SWOT-ST DoP-MAR-COM+ SWOT-OP
"The boss is very accessible to learn from and he supports us. Personally, he has supported me a lot. If I want to learn something, or get more knowledge about other things, he gives me the opportunity to go to courses or something like that. Currently, he is supporting me with an English course (50% of cost) so I can develop that skill further."	The owner supports some employees with English lessons; the owner is supportive	BEM-ENV-INC+ BEM-ENV-REC+ SWOT-ST

“I try to have control over my personal life because work consumes too much time. So I try to pay more attention to what I am doing when I am not working, like my family, my relationships, some pleasure, or shopping, so I'm not overwhelmed by work.”	Interviewee implies that their work-life balance is not good; spends too much time working and takes actions to not feel overwhelmed by it	BEM-ENV-INC-SWOT-WE
“I feel that it would be to cover other areas a little better. Like having a bar worker so that work is not a burden, not so heavy.”	Employee would like more support to do their job	BEM-ENV-REC-SWOT-WE
“And to be able to do a better job because sometimes things come out rushed (things happen because of a rush?) But I feel like things could be better still. Pay more attention to certain small things, details more than anything that we have tried to improve. I feel that a little more staff, perhaps that would be better for us now.”	Employee implies that more staff could help issues such as things coming out rushed or missing details	BEM-ENV-REC-SWOT-WE
“I just feel that sometimes we have to take things a little more seriously. As a business that is like a family business, as close-knit colleagues, I feel that sometimes because we trust each other. But we should be a little more focused on what we are doing because in the end, I am a believer that where I am is the best place so I want it to be the best place.”	Working environment is good because of the familial, close-knit nature of it; however, sometimes that makes them lose focus or not take things seriously	BEM-ENV-INC+SWOT-ST BEM-IND-CAP-SWOT-WE
“I don't know if they have provided us with that information [about the restaurant's objectives and direction for my role, such as the number of clients attended per hour, the average bill of clients, the time it takes to turn a table.]”	Employee doesn't know if he has information on concrete goals/metrics for roles and the restaurant as a whole	BEM-ENV-INF-9B-ORG-GOA-SWOT-WE
“There isn't [onboarding or training]. The boss told me how he wanted me to do things. It was more like feedback between the two of us. It is training in that sense. I feel that we have tried to be in constant learning because we are not very experienced people, but it's not like we have little experience either.”	No structured onboarding or training upon hire; however, there is ongoing feedback, so employee feels like they are always learning	9B-ORG-DES-SWOT-WE BEM-ENV-INF+SWOT-ST

"I feel that sometimes we all need to have more control in having our activities defined. For example, during downtime or always having to do something so as not to be running out of time more than anything when closing time approaches for clients. Be prepared for everything."	Interviewee feels that roles aren't defined during downtime and this contributes to not being prepared later on	BEM-ENV-INF-SWOT-WE
"I feel [expectations and standards] should be more clear. I don't know how. Maybe written on some paper so we're conscious of them."	Interviewee states expectations and standards should be more clear and posted somewhere to see easily	BEM-ENV-INF-SWOT-WE
"I receive [feedback and recognition] daily. If something doesn't go well, I ask to see if he doesn't like it. I seek constant feedback to see what is wrong. And if things are good, I am congratulated."	Employee receives frequent feedback and recognition for good performance	BEM-ENV-INF+
"I have enough [tools and resources to do my job]. Also, I am constantly requesting more that are spent or broken, but for the moment I have enough. Clearly, one could always have more to do more but for the moment I have enough. [We could use] another freezer. Maybe more strainers or a longer bar to hold more things."	Interviewee feels they have enough to do their jobs but there are some things that would help: another freezer, more strainers, longer bar	BEM-ENV-REC+ SWOT-ST BEM-ENV-REC-SWOT-WE
"There isn't a problem [approaching the supervisors]. The atmosphere doesn't feel like work. It feels very, very good. In other places I have worked, there is a line that you can't cross, can't talk about certain things or it feels like sometimes they don't like you. But not here. It feels very good."	Management creates a healthy work environment; they are approachable; the work environment is familial	BEM-ENV-INC+ 9B-ORG-MAN+ SWOT-ST
"Sometimes [employees leave because] they fall into a zone they don't want to, a calm place (stagnant) where they feel like they aren't advancing."	Interviewee implies that some employees leave because they feel like they aren't advancing personally and/or professionally	BEM-IND-MOT- BEM-ENV-INC-SWOT-WE

"We should have a little more training ... I feel like we need to motivate them with more training and make improvement more constant."	Interviewee implies that more training is needed to motivate people	BEM-ENV-INC- BEM-ENV-INF- SWOT-WE
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<i>Interviewee #3 - Current Employee - Chef</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
"Sometimes here it is a great advantage, because the overtime, those of us who work extra hours, they pay us, there are places where they don't pay you."	Interviewee likes that they are paid for overtime because some places do not do that.	BEM-ENV-INC+ SWOT-ST
"Since there is not much staff, we do practically everything. I take care of the orders, I cook, I wash the [...]. The kitchen practically takes care of everything."	The kitchen has a lot of responsibility and it can be stressful.	9B-ORG-DES- SWOT-WE
"The kitchen is demanding because sometimes you don't have enough hours to be able to work. Yes, you know what I mean? For example, now that I have a daughter, I would like to spend more time with her, right? Well, on the other hand, I have to provide for her so that she has everything she needs."	The kitchen is a demanding environment and he does not have the work-life balance that he would like to spend more time with his daughter.	BEM-ENV-INC- SWOT-WE
"Well having all the tools to be able to work. Sometimes we want everything, but sometimes you can't in the kitchen. Well, what more would we want than to have a well-equipped kitchen with all the things we need and that they don't supply the products we ask for, but obviously I know that it goes through the administration, so I can buy it for you. Not that. So it's a game of "No, yes, but yes, but no"."	There are some tools and equipment in the kitchen that are missing, but not everything they ask for is approved.	BEM-ENV-REC- SWOT-WE
"It lacks several things, several things in the kitchen, of course, right now there, in the kitchen we have, it is very hot and we need an extractor fan because there is a lot of heat."	Kitchen is lacking an extractor fan which is making it very hot.	BEM-ENV-REC- SWOT-WE

“Well, the tile comes off, it moves, it moves and when the floor is washed, the water stagnates there and as time goes by, it smells more and more. Well, and we are constantly cleaning it, but it does not come off, it does not remove that smell.”	The kitchen has a bad smell due to the tiles coming off and the water being stagnate.	BEM-ENV-REC-SWOT-WE
“Wood, because it causes cockroaches to arrive, the heat that causes cockroaches to arrive, the bad smell, all that is not suitable for a kitchen”	The bad smell in the kitchen causes cockroaches which is not good for a kitchen.	BEM-ENV-REC-SWOT-WE
“No, because they don't disinfect, they don't disinfect the vegetables well. They don't cook the chicken properly, all the dirt that emerges. In other words, there are many factors that, like three or four years ago, he talked a lot about this health issue.”	There isn't a protocol for disinfecting vegetables properly, cooking chicken properly, etc. that can cause health issues.	BEM-ENV-REC-BEM-IND-KnS-SWOT-WE
“For example, to bring out a dish that is not on the menu, but to be able to bring out or give ideas for special menus or meals or something like that....Yes, it's like something because you want to contribute a little bit, but you don't know that nothing is already established and no, no, it's not like that, that you can't change things that are already there.”	Interviewee wants to contribute more to the menu and give more ideas, even though things are already established.	BEM-ENV-INC-BEM-IND-MOT-SWOT-WE
“Well, I would say this having constant training, I mean, with the staff, I mean, give them a day to meet. You know what, look, let's do this. Motivate the staff. Good, good practices... This is a way to have courses, training courses on food, hygiene, risk courses, when there is an earthquake, on fires, because practically at any time, well, if we are not trained for, for, for that we all run to the family.”	Interviewee feels that more consistent training is needed on food, hygiene, risk, good practices, etc. Interviewee feels this will help with motivating the staff.	BEM-IND-KnS-BEM-ENV-INF-SWOT-WE
“We are constantly training the personnel, both as cooks and managers. We train the cooks who are promoted to managers in that position, so that they can be promoted to kitchen managers. We are also trained in inventories and shrinkage,	Interviewee says that they are cross trained.	BEM-IND-KnS+SWOT-ST

stock of hygiene products, temperature controls, all of that.”		
“Well, I would say that it is good, but sometimes, as always, there is always friction, both service and kitchen, there will always be friction and well, in my kitchen and in my kitchen we get along well...Sometimes you get things out fast, but the service takes a while. It takes a while to pick it up. Then you have to be pushing. Hey, it got cold, but it's not the kitchen's fault, it's the service, because they didn't come on time to bring it.”	Sometimes there is friction between the kitchen and service due to service being slow and the food getting cold.	BEM-IND-CAP-SWOT-WE
“There is always a solution, they always solve things. Sometimes if they don't solve it, we look for a solution.”	Management is good at coming up with solutions to problems.	9B-ORG-MAN+SWOT-ST
“They load you with work when you go at your own pace. When you are working, they let you, they let you work at your own pace.”	Management lets them work at their pace and don't overload them with shifts if they cannot handle it.	9B-ORG-MAN+SWOT-ST

<i>Interviewee #4 - Former Employee - Bartender</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
“Truthfully, my first impression, that is, the first days I was working in Tlayuda Querida, was a very nice experience. The people I worked with for at least 50% of the payroll, well, they were a family for me, really. In fact, I still have contact with them because I managed to get involved very well with them. I mean, it's a very pleasant work space. There is a lot of companionship, teamwork in some areas.”	Interviewee felt strong companionship with his colleagues	BEM-IND-MOT+SWOT-ST
“I was paid fairly, well paid and besides the fact that it is a job that considers your overtime. Not just any job considers your overtime.”	Interviewee was well paid in relation to other jobs especially because of overtime	BEM-ENV-INC+DoP-MAR-COM+SWOT-ST SWOT-OP
“I don't remember having bonuses.”	No bonuses from their recollection	BEM-ENV-INC-SWOT-WE

“What I really liked was the freedom they gave us to work. In other words, our immediate bosses gave us the confidence to be able to carry out our work. So they also give us that confidence of being able to develop products, develop a drink menu as well as our work. As a signature kitchen, so to speak, signature drinks. So, that freedom that they give us to experience seems quite good to me.”	Interviewee enjoyed freedom at job; the bosses had confidence in their employees	BEM-IND-MOT+ BEM-ENV-INC+ SWOT-ST
“ The most negative experience I had with respect to the company was with my floor manager at the time. There was theft not in terms of supplies but in terms of products, especially beer. There were at least losses of at least 500 pesos a day ... I went through what was a conflict of interest that was not at all pleasant and well, literally, that's why I had to leave the company. I feel that there was no longer respect for senior management. The top management placed trust in those who were really stealing from him.”	Employee left because a floor manager was responsible for theft of products; interviewee felt that they weren't respected the top manager	9B-ORG-MAN-5 9B-PRO-MAN-5 SWOT-TH
“There was no alignment in terms of objectives. We did know that the work we had to do was the activities, but there really wasn't a common goal that could unite us all as a team, not from top management to middle management to operational areas.”	No common goals and objectives	BEM-ENV-INF- 9B-ORG-GOA- 9B-PRO-GO- 9B-ORG-DES- 9B-PRO-DES SWOT-WE
“I think that at some point we had to be intuitive with the things we needed to do. But yes, even though there were no printed roles or specific, printed tasks, without training, it is very clear to us what our role was to power our participation in the company.”	Interviewee says there is nothing printed related to rules and sometimes employees had to figure out what to do	BEM-ENV-INF- SWOT-WE
“I think they could work a little bit on [making standards and expectations clear] for the medium or long term. They need a long-term vision.”	Interviewee thinks business needs better long term goals and they need to better communicated to employees	BEM-ENV-INF- 9B-ORG-GOA- SWOT-WE

"I always had the confidence to approach [the owner and manager D] and talk. However, with the floor managers and with the managers, well, we never had a good relationship."	Interviewee felt good communicating with the owner and manager D but not with other managers	9B-ORG-MAN+ SWOT-ST 9B-ORG-MAN- SWOT-WE
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<i>Interviewee #5 - Former Employee - Server</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
"Overall my experience has been good. Colleagues are very respectful and friendly. The atmosphere is very good."	Interviewee has a good overall experience in the restaurant due to her colleagues	BEM-ENV-INC+ SWOT-ST
"I like to interact with tourists from abroad. They like to know about our state and food. I like being able to help them. For example, I have to explain when they don't know certain foods or don't know what this herb is. So, by explaining it to them many times, they get more excited to try it. And that's why I really like the place. I get the confidence to interact with the people who visit."	Interviewee is motivated to work for the restaurant because of their interactions with guests	BEM-IND-MOT+ SWOT-ST
"Compared to other jobs I've had, my salary is pretty much the same. It's not much different. My salary was always the same since I joined and it never changed. Nor have they made any comments to me about it."	Interviewee did not receive any raises; employee said pay was the same as other jobs	BEM-ENV-INC- SWOT-WE
"I learned a lot when it comes to the restaurant business. There were a lot of things that I didn't know and personally, I like to learn not only what I know how to do, which is related to my career, but to learn other things. I like to know how to do a little of everything. So in that part I feel satisfied."	Interviewee is motivated by learning new things and was satisfied with her ability to learn new things in the restaurant	BEM-IND-MOT+ BEM-ENV-INC+ SWOT-ST
"They supported me... For example, they give me permission to miss or to arrive a little late when I had a course or a workshop."	Management was flexible with the interviewee's schedule	BEM-ENV-INC+ SWOT-ST
"It was a little difficult to have a balance between work and my personal life."	Interviewee found work-life balance difficult	BEM-ENV-INC- SWOT-WE

"I feel that they need a little more organization. I would have liked a little more communication, organization, having an order for certain things."	Interviewee felt the restaurant could be improved by better organization and communication	9B-PRO-DES-SWOT-WE
"They explained to me a little about what my functions were and how to do certain activities, but it was over time."	No upfront training	BEM-ENV-INF-SWOT-WE
"They have told me that they like my work and I really value that a lot because it means that I am doing things right. They like the way I work."	Interviewee received feedback for their performance	BEM-ENV-INF+SWOT-ST
"A radio would be quite useful. It is a good tool because I was downstairs receiving people and sometimes you can't be using the cell phone or sometimes they don't answer when they are busy and I need to know that chair number and if there is a table available. I feel like the work would be a little faster and more efficient. It would be a useful and fast tool for me."	A radio would be a useful resource for communicate between the two levels It is difficult to communicate and coordinate between the two levels	BEM-ENV-REC-BEM-IND-CAP-SWOT-WE
"I felt comfortable talking to Rene or Deni."	Interviewee had no issues communicating with managers	9B-ORG-MAN+SWOT-ST
"I left because of a situation with a supervisor. It affected my mental health. That person was a bully and very rude. This person's behavior led to several people leaving."	Poor manager in the past	9B-ORG-MAN-9B-PRO-MAN-BEM-IND-MOT-SWOT-TH

<i>Interviewee #6 - Current Employee - Shopper/Maintenance Person</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
"Well, we feel satisfied with what we do so far, we feel satisfied."	The employee feels satisfied with current role.	BEM-IND-MOT+SWOT-ST
"Yes, yes, I like to learn new things. For example, we need melons for the terrace for cocktails. It is not the same as the one used in the kitchen for decoration. Each one has its own specifications So I'm learning."	The employee is satisfied that he is able to learn something new consistently.	BEM-IND-MOT+SWOT-ST
"The thing is that the salary is proportional to the work. Here the salary is... because the salary I have	The employee is happy with the compensation based on the work being required to perform.	BEM-ENV-INC+SWOT-ST

is, well, where I worked, it was a higher salary, but also the work was heavier.”		
“I mean, not exactly, but there are perks. For example, in my case I don't pay fares because he lends me the truck. No, he does not give me more money, but he does give me the truck, he gives me diesel. So there are things that do not count in cash.”	There are not necessarily cash incentives but the employee is happy that he gets lended a truck.	BEM-ENV-INC+ SWOT-ST
“How could it improve? Yes, maybe by learning more, learning more to be able to give the best.”	The employee thinks work could improve by being able to learn more.	BEM-IND-KnS- SWOT-WE
“Like need something right now, no, no, because what we need we buy, we acquire it...What happens is I buy them, good tools for repair work. They are mine. I have all the tools. So, are these tools from the cafe? No.. He has tools, he has them in storage and all the tools I work with are mine. So, if I need an extra tool, I go and buy it, but since it's mine, I don't ask his permission, I go and buy my tool.”	All the tools the employees used to make repairs are his own. If he needs something he goes and purchases it himself.	BEM-ENV-REC- SWOT-WE
“Well, it's a very calm environment. So now each person is in their work area greet each other. “Good morning. Good afternoon. How are you?” And a little joke or two and we don't get too much involved during their work. Just as they don't interfere with my work. I mean, everyone has their own area. Well, we've been with each other for a while now. No, we don't have any disrespect against each other.”	It is a good work environment.	BEM-ENV-INC+

<i>Interviewee #7 - Boomerang - Cook</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
“The environment has always been nice since I was working. I didn't stay because I got sick, but I was comfortable there, so I was comfortable. I mean, I have never had any problems.”	It is a good work environment.	BEM-ENV-INC+ SWOT-ST

"What motivates me to keep learning more, to keep learning more, to realize that I have the ability, to realize that I have a greater need, because it is to work."	Learning is one of the biggest motivating factors. They get to learn a lot in this restaurant.	BEM-IND-KnS+ SWOT-ST
"Well, when I came and asked for the job and from there I was trained. They were teaching me, they were teaching me and from there I was learning and from there I was executing what they were telling me when I went out to the restaurant, I mean, I learned, yes, to do it and to execute it. Well, I mean, the three things they taught me to be able to develop later in the restaurant."	Interviewee had basic training when starting a role, then the rest was on the job training/learning.	BEM-ENV-INF+ SWOT-ST
"Yes, we have, we have what we need. Pans, knives, cage, everything in the kitchen is well equipped. Yes, maybe there are some things missing, but there is everything we need."	The kitchen is currently equipped with all necessary tools.	BEM-ENV-REC+ SWOT-ST
"Well I say fine, here we get along well down there. Inside is where there is harmony too. Well, there is respect. More than anything else."	The staff gets along well and respects each other.	BEM-ENV-INC+ SWOT-ST
"I feel that we should give ourselves training at least every three months and every six months change the menu, another little bit different. I think it would work better if it was understood that way."	The interviewee suggests having more on-going training and to change the menu periodically.	BEM-IND-KnS- SWOT-WE

<i>Meetings with Client and Right Hand Supervisor</i>		
First-order Code (quoted statement)	Second-order Code (inference)	Category Code
"I desire an annual turnover rate between 15-20%."	The owner has a goal for turnover	9B-ORG-GO+
"I would like to be listed in the top restaurants of Mexico (la Guía México Gastronómico) and I would like a 4.8 feedback rating out of 5 on Google Reviews. Additionally, there are my financial goals:	The owner has clear organizational goals	9B-ORG-GO+

• 40,000 MXN (Mexican pesos) sales of food and drinks on Friday/Saturday nights (current is 20,000 MXN) • 80 people served for dinner on Friday/Saturday nights (current is 45) • 1,000 MXN bill per person on average on the weekends (current is 500 MXN)" • 15,000 MXN sales of food and drinks on other nights (current is 10,000 MXN)"		
"There is a limit to the number of people we can hire for financial reasons."	Financial limitations hinder the ability to hire more staff	HAR-SOL-CON SWOT-WE
"Too many people are quitting. The turnover is too high."	The restaurant is not performing as well as it would like regarding turnover	HAR-PER-PRO SWOT-WE
"We give employees insurance when other businesses do not."	Owner gives incentive (insurance)	BEM-ENV-INC+ SWOT-ST
"No hard data on performance exists."	The business doesn't keep data that can help improve processes	9B-ORG-DES- 9B-PRO-DES- 9B-PRO-MAN- 9B-PRO-MAN- SWOT-WE
"Training is limited because we don't want to invest in employees who will leave quickly."	Training is limited	9B-ORG-DES- 9B-PRO-DES- 9B-PRO-MAN- 9B-PRO-MAN- SWOT-WE
"The high turnover rate affects the business in several ways: ◆ Lost investment of time and money training employees who leave ◆ Insurance continues to be paid for employees for a week after they leave	Many negative impacts of high turnover; this problem impacts business goals	9B-ORG-GOA- SWOT-WE

◆ Time and money to hire new employees, onboard, and train them ● Note about employee onboarding: there is no formal training or onboarding procedure beyond 1-2 days of job shadowing for servers and it's not possible to quantify how much it costs. ◆ In the case of newly hired cooks, a lot of ingredients are wasted during training and the first months of work. In turn, inconsistent food makes customers unsatisfied. ◆ New cooks and bartenders are much slower in preparing food and drinks, making customers unsatisfied. ◆ When a new chef is hired, the menu has to be redone and kitchen staff tend to leave as well. The previous chef had created several recipes that he took with him and the new chef and owner had to create new dishes to replace them. We could not get answers to why the last chef and cook left because we were not allowed to interview them per the owner's request. ◆ Bad managers cause employees to leave. (In the past year, there have been three managers.) - our interviews with departed		
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employees confirmed this. However, current employees are happy with the management."		
"There is a system in place to meet the kitchen's goal of preparing the dishes to serve within 10 minutes."	The owner has process level goals	9B-PRO-GO+
"There is not a formal structure for evaluating and monitoring performance."	Management is not tracking performance formally	9B-ORG-MAN-SWOT-WE
"I have opinions on employee satisfaction, goals, etc., but I do not have hard data collected via structured interviews, surveys, etc."	Management doesn't collect data on employee satisfaction	9B-ORG-MAN-SWOT-WE
"Political factors that influence my business: → Changes in regulations regarding terraces in Centro ◆ The terrace was closed in March and modified to comply with regulations in April (this was not applied evenly to all restaurants due to corruption). ● These repairs were very costly and the restaurant lost a lot of business because customers prefer the terrace to the lower level. → Change in minimum wage - from 160 to 220 MXN per day, an almost a 40% increase - starting January 2023 → Change in the price of insurance price - from 2,500 to 3,500 per person per month, a 40% increase - starting January 2023 → Change in the minimum days of paid vacation - from 6 days to 12 days, a 100% increase - starting January 2023 → Change in holiday working pay - from 2x to 3x regular salary - starting January 2023"	Several political factors negatively impact running the restaurant	DoP-MAR-POL-SWOT-TH
"Social factors that influence my business: → Protests and bloqueos (protesters blocking roads) happen frequently, which makes it	Protests and bloqueos (protesters blocking roads) negatively impact the business	DoP-MAR-SOC-SWOT-TH

difficult for employees to arrive at work, shopping to be done, etc.”		
“Environmental disruptions that impact my business: → Effects of inflation: January - May: up 25% from the prices from 2022 (now down to 10%) → Oaxaca is located in a seismic zone, which means that earthquakes happen frequently. The buildings in the centro are historical and not built to modern standards for seismic zones. Earthquakes can cause damage to the building, blackouts and customers leaving (due to being afraid). “	Some environmental disruptions negatively impact the business	DoP-MAR-ENV-SWOT-TH
(owner talking about a past experience hiring an outside consultant to provide training for employees) “I think that what worked well was that they had more like knowledge, they had the same idea of how I wanted them to prepare the coffees, for example, or what the processes to prepare each coffee were, they had a little more clarity, and for example, I talked to them about them and they understood what I was talking about, I think that worked a little more.”	The owner said that the training helped the employees to get background knowledge of coffee and important terminology for work.	MC-EFF+
(continuing to talk about the previous experience) “what did not work. And then, for example, some people, after about a month, left the company. So I don't know how much it helped in preparing things well after the training.”	Some people left the company about a month after receiving training.	MC-EFF-SWOT-TH ONB-TR-
“It took one week and the price was 3500.” “...3 people are about 10,000.”	The coffee training took one week, at 3500 pesos per person, meaning 10,500 for three people (almost the monthly salary for 2 people).	MC-FEA-ONB-TR-
I don't have a method. Well, well if this happened, but yes what it is and, above all, well on the part of the performance things in like the no yes well	The owner doesn't have a formal evaluation method for managers. He observes the way they resolve problems and whether departments are satisfied.	BEM-ENV-INF-SWOT-WE

there are always like little flaws sometimes is and it's a lot of people but I think a lot of people like a lot of customers, the people that work in the and a lot of things to see like lists, like the tools, but I think I can always say, like when someone has a good when the areas are like satisfied or satisfied with or are satisfied with or are satisfied with, because always, when, for example, the kitchen, says is that they are not bringing me what I'm asking for and mmm I need someone to help me and I have no one to help me or things like that or I send him a message and he never answers me I don't feel ignored when, because if it happened then when, like all those things that don't fail, do I consider.		
"What were the activities they did in their previous job or in some similar experience they had. And also do they solve some problem in a similar job and Well. First they tell me the problem and then how."	The owner already asks a behavioral question when interviewing managers. It would be easy to add a few more questions to better understand the potential manager.	MC-FEA+ HR-MAN+
"I usually meet with at least one or, let's put it this way. Well, in the restaurant we don't have a convention yet, an area manager, a head waiter, a captain, a leader. So, what I usually do is to kind of address and see what's going wrong or what's going wrong in order to be able to do a better job."	The assistant manager says that she meets with each department individually.	BEM-ENV-INF+ SWOT-ST
"It's hard to have a meeting with everybody. And sometimes it is, more than anything else, because of the schedules in which the meetings are held or in which most of them start. That is why it is difficult for us."	It's difficult to have a meeting with all of the departments together because of shifts and lack of department leaders.	MC-FEA- TM-MT-
"There are people who fulfill like a year, so we are going to increase their salary. But we are going to	The owner said that employees who complete a year of employment will get a salary increase, but they don't	MC-FEA+ SWOT-ST

say that, for example, it is not determined, that is, they do not know. But for example, there is a cook who is going to have a year this month and he is going to, well, I am going to increase his salary and also, for example, Deni, just before her one year anniversary I raised her salary. And there is like a percentage for like a year, an increase of I don't know, 5 or something like that, or it depends on the person. It rather depends." When asked if the employees know they will get a raise in a year, he said, "No."	know about it. (There is already a budget for a salary raise, the intervention would be to simply tell the employees about it.)	SWOT-WE
"Yes, yes. Well, for example, there is a boy, as you know, who has a 50 percent scholarship for English classes. So I want to, well, yes I have thought about, in the future, implementing that scholarship so that it can be for everything. For example, to offer I don't know 50 percent to go to a gym. Yeah, I've thought about giving it to them."	The owner wants to implement a scholarship for any type of class for employees.	MC-FEA+
"Because of the problem we had, I had to fire one actually. Then sometimes we don't have enough workers. For example, we still need to hire more cooks."	The owner said that he doesn't have department leaders because of problems in the past and lack of staff.	MC-FEA- MC-AFF- SWOT-WE TL-CHK-
"I have the girl Carolina as the head of, well, there is the terrace and want Mrs. Sandra to be the boss downstairs."	The owner is working on putting current employees in leadership positions - one for the terrace and one for the lower level.	MC-FEA+ MC-AFF+
"Yes, there is a list of tasks. There are some established ones that already existed before I arrived. I don't really know, but there is something already determined, but there are things that could be changed to do better the tasks that each one has." "Yes, I was doing it in the area of but I think I did communities of activities, not I don't want him to share." "...in the kitchen and at the bar. And only in these areas. Only those 2 areas."	There are already task lists for 2 areas: bathroom and kitchen. The employees follow them. It should be easy to implement them in other areas (bar, downstairs, upstairs service area).	MC-FEA+ TL-CHK-

"We focus a lot on like the service and if we do that, we need to stop paying attention to the service?" " I have to do other things. For example, right now we are dealing with sales information, for example how much we sold."	The owner said that they don't have time and staff to keep track of more data, such as turnover costs.	MC-FEA- MC-AFF- SWOT-WE DT-TRK-
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A.3 Survey Results

<i>Former Employees - Hostess and Bartender - Both 4 Months Employed</i>				
Question	Options	# of Responses	Notes	Code
How prepared do you feel in the event of an emergency (earthquake, fire, fights, etc.)?	Not at all prepared- the restaurant hasn't trained me for this at all			ONB-TRN/
	A little unprepared	1	Host	
	A little prepared	1	Bartender	
	Very prepared- the restaurant provided formal emergency training			
Please indicate your level of agreement with each statement regarding your experience at Tlayuda Querida. (Strongly disagree, Disagree, Neutral, Agree, Strongly Agree)	The on-the-job training provided at the beginning of my employment prepared me to do my job well.	Disagree - 1 Agree - 1	Hostess Bartender	ONB-TRN/
	I am satisfied with the career advancement opportunities available for me.	Disagree - 1 Agree - 1	Hostess Bartender	PRF-DEV/
	Expectations and performance standards are clear and fair.	Agree - 2	Hostess and bartender	RS-BNS-
	I get regular feedback on my performance.	Agree -2	Hostess and bartender	-
	The managers treat the employees with respect.	Strongly Agree - 1 Agree - 1	Hostess Bartender	-
	I know how I can receive a raise, bonuses, and other benefits.	Disagree - 1 Agree - 1	Hostess Bartender	RS-BNS/
	Communication between team members (including across departments) is good.	Neutral - 2	Hostess and bartender	TM-MT/
	I know what I should be doing during downtime.	Neutral - 1 Agree - 1	Hostess Bartender	TL-CHK-

Please rank each criterion by their importance. For example, mark one choice as "Most Important," one as "Least Important," and the others with the other ranks in between. Each criterion should be chosen once.	Managers treat employees respectfully	2nd - 2	Hostess and bartender	HR-MAN+
	A strong onboarding and training program	2nd - 2	Hostess and bartender	ONB-TRN+
	Professional development opportunities (ability to cross train, classes that the employer pays for, etc.)	3rd - 1 1st - 1	Hostess Bartender	PRF-DEV+
	Clear job expectations and performance reviews	4th - 1 1st - 1	Hostess Bartender	RS-BNS/
	Knowing how and when I can receive raises and bonuses	5th - 1 2nd - 1	Hostess Bartender	RS-BNS/
	Clear communication between team members and different departments	3rd - 1 2nd - 1	Hostess Bartender	TM-MT+
What is the most important factor that motivates you to stay employed with a job (ANY job, not just Tlayuda Querida)?	Continue learning, grow professionally, increase my financial income, feel comfortable carrying out my activities and with my co-workers.		Hostess	PRF-DEV+
	Growth opportunities		Bartender	PRF-DEV+
Write the most important thing Tlayuda Querida needs	Constant training of staff to improve service, evaluations of consumers to know what they like and what they don't about the place, offer other food options, improve the infrastructure (terrace) since it is in competition with other restaurants and many are going for the view that the place has. Offer employees job security and the option for professional growth.		Hostess	ONB-TRN+

to improve. Think of the restaurant's deficiencies but also things that other restaurants do or provide that you think Tlayuda Querida should do.	Refine a mission and vision, a system of values and dynamics with the rest of the collaborators to unify the team to that mission and vision.	Bartender	TM-MT+
Why did you leave Tlayuda Querida?	Due to problems (harassment) from a co-worker and health issues.	Hostess	-
	Due to discomfort with some administrative parts, lack of operational support from the Floor Manager, delivery of tips at his discretion; changes in rooftop remodeling and lack of the necessary resources to develop a good service at that time. The drinks menu was too extensive and unstrategic.	Bartender	HR-MAN+

<i>Current Employees</i>				
Question	Options	# of Responses	Notes	
How prepared do you feel in the event of an emergency (earthquake, fire, fights, etc.)?	Not at all prepared- the restaurant hasn't trained me for this at all	1	Waiter (3 months)	ONB-TRN+
	A little unprepared	2	Bartender (12 months) and Chef/Cook (5 months)	
	A little prepared	1	Bartender (1 month)	
	Very prepared- the restaurant provided formal emergency training			
Please indicate your level of	The on-the-job training provided at the beginning of my employment prepared me to do my job well.	Disagree - 1 Neutral - 1 Agree - 1	Waiter (3 months)	ONB-TRN/

agreement with each statement regarding your experience at Tlayuda Querida. (Strongly disagree, Disagree, Neutral, Agree, Strongly Agree)		Strongly Agree - 1	Chef/Cook (5 months)	
			Bartender (12 months)	
			Bartender (1 month)	
	I am satisfied with the career advancement opportunities available for me.	Neutral - 1 Agree - 1 Strongly Agree - 2	Waiter (3 months)	PRF-DEV-
			Chef/Cook (5 months)	
			Bartender (12 months), Bartender (1 month)	
	Expectations and performance standards are clear and fair.	Neutral - 2 Strongly Agree - 2	Waiter (3 months), Chef/Cook (5 months)	-
			Bartender (12 months), Bartender (1 month)	
	I get regular feedback on my performance.	Agree - 1 Strongly Agree - 3	Waiter (3 months)	-
			Bartender (12 months), Bartender (1 month), Chef/Cook (5 months)	
	The managers treat the employees with respect.	Strongly Agree - 4	Bartender (12 months), Waiter (3 months), Chef/Cook (5 months),	-

			Bartender (1 month)	
	I know how I can receive a raise, bonuses, and other benefits.	Disagree - 1 Neutral - 1 Strongly Agree - 2	Waiter (3 months)	RS-BNS/
			Chef/Cook (5 months)	
			Bartender (12 months), Bartender (1 month)	
	Communication between team members (including across departments) is good.	Strongly Agree - 4	Bartender (12 months), Bartender (1 month), Waiter (3 months), Chef/Cook (5 months)	TM-MT-
Please rank each criterion by their importance. For example, mark one choice as "Most Important," one as "Least	I know what I should be doing during downtime.	Agree - 1 Strongly Agree - 3	Bartender (12 months)	TL-CHK-
			Bartender (1 month), Waiter (3 months), Chef/Cook (5 months)	
	Managers treat employees respectfully	1st - 1 2nd - 1 5th - 2	Waiter (3 months)	-
			Chef/Cook (5 months)	
			Bartender (12 months), Bartender (1 month)	
	A strong onboarding and training program	2nd - 1 4th - 2 6th - 1	Waiter (3 months)	ONB-TRN/

Important," and the others with the other ranks in between. Each criterion should be chosen once.			Bartender (12 months), Bartender (1 month)	
			Chef/Cook (5 months)	
	Professional development opportunities (ability to cross train, classes that the employer pays for, etc.)	1st - 1 3rd - 3	Chef/Cook (5 months)	PRF-DEV+
			Bartender (12 months), Bartender (1 month), Waiter (3 months)	
	Clear job expectations and performance reviews	2nd - 2 4th - 1 5th - 1	Bartender (12 months), Bartender (1 month)	PRF-DEV/
			Waiter (3 months)	
			Chef/Cook (5 months)	
	Knowing how and when I can receive raises and bonuses	3rd - 1 4th - 1 6th - 2	Waiter (3 months)	RS-BNS-
			Chef/Cook (5 months)	
			Bartender (12 months), Bartender (1 month)	
	Clear communication between team members and different departments	1st - 2 3rd - 2	Bartender (12 months), Bartender (1 month)	TM-MT+
			Waiter (3 months),	

			Chef/Cook (5 months)	
What is the most important factor that motivates you to stay employed with a job (ANY job, not just Tlayuda Querida)?	Personal and professional growth		Bartender (12 months)	PRF-DEV+
	Job satisfaction		Bartender (1 month)	-
	Financial stability		Waiter (3 months)	-
	Personal and professional growth		Chef/Cook (5 months)	PRF-DEV+
Write the most important thing Tlayuda Querida needs to improve. Think of the restaurant's deficiencies but also things that other restaurants do or provide.	More advertising, better facilities and improve areas to provide the best possible service		Bartender (12 months)	-
	The facilities, to be able to provide a better service		Bartender (1 month)	-
	N/A		Waiter (3 months)	-
	Employee training, both for natural and workplace disasters		Chef/Cook (5 months)	ONB-TRN+

A.4 Turnover Data from Unstructured Interviews

Month	Total Number of Employees	Total Turnover Rate	Turnover Rate (Willing Only)
December 2022	18	N/A	N/A
January 2023	15	6.06%	6.06%
February 2023	14	6.90%	6.90%
March 2023	13	22.22%	22.22%
April 2023	12	8.00%	0.00%
May 2023	11	0.00%	0.00%
June 2023	12	26.09%	26.09%
July 2023	12	0.00%	0.00%
August 2023	12	8.33%	8.33%
September 2023	13	8.00%	8.00%
Average monthly turnover (willing only): # of employees who left / (beginning + ending number of employees each month)		8.62%	
Extrapolated annual turnover (willing only):		103.47%	

8.2 Appendix B: Tools and Instruments

B.1 Frameworks and Models

Chevalier's Updated Behavior Engineering Model

Environment	Information 1. Roles and performance expectations are clearly defined; employees are given relevant and frequent feedback about the adequacy of performance. 2. Clear and relevant guides are used to describe the work process. 3. The performance management system guides employee performance and development.	Resources 1. Materials, tools, and time needed to do the job are present. 2. Processes and procedures are clearly defined and enhance individual performance if followed. 3. Overall physical and psychological work environment contributes to improved performance; work conditions are safe, clean, organized, and conducive to performance.	Incentives 1. Financial and nonfinancial incentives are present; measurement and reward systems reinforce positive performance. 2. Jobs are enriched to allow for fulfillment of employee needs. 3. Overall work environment is positive, where employees believe they have an opportunity to succeed; career development opportunities are present.
Individual	Knowledge/skills 1. Employees have the necessary knowledge, experience, and skills to do the desired behaviors. 2. Employees with the necessary knowledge, experience, and skills are properly placed to use and share what they know. 3. Employees are cross-trained to understand each other's roles.	Capacity 1. Employees have the capacity to learn and do what is needed to perform successfully. 2. Employees are recruited and selected to match the realities of the work situation. 3. Employees are free of emotional limitations that would interfere with their performance.	Motives 1. Motives of employees are aligned with the work and the work environment. 2. Employees desire to perform the required jobs. 3. Employees are recruited and selected to match the realities of the work situation.

Reprinted from Chevalier, R. (2003). Updating the behavior engineering model. *Performance Improvement*, 42(5), 8–14.

Harless' Front-End/Cause Analysis

The original paper written by J.H. Harless can be found via [this link](#).

Intervention Priority Chart

PERFORMANCE SUPPORT TOOL 9.2. INTERVENTION PRIORITY CHART

Directions: After reflection, select six interventions from the ten to fifteen interventions you checked on the Intervention Selector that you believe to be the *most* feasible solutions for the identified performance gap and cause. Enter the name of the intervention next to the priority number that you would assign to the intervention (6 = highest priority to 1 = lowest priority). If you select fewer than six interventions, you should still begin with six and leave the lower numbers blank. (See the example below.)

After you have prioritized the interventions use Column 3 to briefly describe each intervention in your own words.

Priority (6 to 1)	Intervention	Personal Description of Intervention
6 (Example)	Coaching	Readily available resource person to help employees with initial usage
6		
5		
4		
3		
2		
1		

Reprinted from Van Tiem, D., Moseley, J. L., & Dessinger, J. C. (2012). *Fundamentals of performance improvement: Optimizing Results through People, Process, and Organizations*. John Wiley & Sons.

Judith Hale's Dynamics of Performance

A video referencing this model can be found via [this link](#).

Multicriteria Analysis

An explanation of the Multicriteria Analysis can be found via [this PDF](#) on page 171.

Rummler and Brache's Nine Boxes Model

	Goals	Design	Management
Organization	Strategy, operating plans, and metrics	Organization structure and overall business model	Performance review practices and management culture
Process	Customer and business requirements	Process design, systems design, and workspace design	Process ownership, process management, and continuous improvement
Performer	Job specifications, performance metrics, and individual development plans	Job roles and responsibilities, skill requirements, procedures, tools, and training	Performance feedback, consequences, coaching, and support

Reproduced from *The nine boxes model*. (2020, October 15). RummlerBrache.com.
<https://www.rummlerbrache.com/nine-boxes-model>

SWOT Analysis

An article that explains a SWOT Analysis can be found via [this link](#).

B.2 ChatGPT

We used ChatGPT to help with some planning. Here are the prompts we gave it and the responses it gave us, along with explanations for how we used its responses.

Prompt:

A restaurant is experiencing a high turnover rate among employees. Using the Behavior Engineering Model (Chevalier's updated version), write no more than 10 interview questions for employees (servers, cooks and auxiliary staff) that investigate this.

Response:

The Behavior Engineering Model (BEM) by Thomas F. Gilbert is a valuable framework for analyzing and addressing performance issues in organizations. While there isn't an "updated version" by someone named Chevalier that I'm aware of, I can provide you with interview questions that align with the BEM framework to investigate the high turnover rate among restaurant employees. These questions can help you identify the root causes of the turnover and design effective interventions to address the issues:

1. Outcome Question (O): Can you describe your overall experience working at our restaurant in terms of job satisfaction, engagement, and the likelihood of staying with us long-term?
2. Capability Question (C): Are there any specific skills or knowledge gaps you feel are preventing you from performing your job effectively or advancing in your role?
3. Opportunity Question (O): Do you feel you have access to the necessary resources, tools, and support to excel in your position and overcome any challenges you face?
4. Motivation Question (M): What aspects of your job do you find most motivating and fulfilling? Conversely, are there any demotivating factors that make you consider leaving?
5. Feedback Question (F): How often do you receive feedback and recognition for your performance, and do you believe it helps you improve and stay engaged in your role?
6. Consequences Question (C): Are there any consequences or rewards related to your job performance that you find unfair or unsatisfactory?

7. Antecedents Question (A): Can you share any workplace policies, procedures, or practices that you think could be improved to enhance your job satisfaction and retention?
8. Information Question (I): Are you aware of the career growth opportunities within the restaurant, and do you believe you have clear paths for advancement?
9. Resources Question (R): Do you have access to the necessary training and development opportunities to enhance your skills and advance your career within the restaurant?
10. Conditions Question (C): Can you identify any environmental factors or conditions in the workplace that impact your job satisfaction or your decision to stay or leave?

These questions cover various aspects of the BEM framework, allowing you to pinpoint the factors contributing to the high turnover rate among servers, cooks, and auxiliary staff in your restaurant. After conducting these interviews, you can analyze the feedback to develop targeted interventions and improvements in your workplace to reduce turnover and enhance employee satisfaction and performance.

How we used this:

- **Made the questions more open-ended**
- **Some questions are redundant**

Prompt 2:

Can you write more questions that are unique from the previous questions, still using the same model?

Response:

Certainly, here are some additional interview questions that delve deeper into the Behavior Engineering Model (BEM) framework while offering unique perspectives on the turnover issue in your restaurant:

1. Performance Standards (C): How well do you understand the performance expectations and standards for your role, and do you feel they are fair and realistic?
2. Task Clarity (C): Can you provide examples of instances when you felt uncertain about your responsibilities or tasks? How did this uncertainty affect your job satisfaction?

3. Peer Relationships (M): How would you describe your relationships with your coworkers? Do you think a positive or negative work environment plays a role in employee turnover?
4. Supervision (M): What is your perception of the quality of supervision and leadership within the restaurant? How does this influence your job satisfaction and decision to stay?
5. Recognition (F): Beyond monetary compensation, do you feel adequately recognized and appreciated for your contributions? How important is recognition to your job satisfaction?
6. Work-Life Balance (C): How do you manage your work-life balance, and do you feel that your job demands impact your personal life significantly?
7. Professional Development (R): Are there specific skills or areas of expertise you would like to develop, and do you believe the restaurant supports your growth in these areas?
8. Workload Distribution (C): Is the workload distributed fairly among team members, or do you believe some employees are unfairly burdened? How does this affect job satisfaction?
9. Conflict Resolution (M): How are conflicts and disagreements handled in the workplace, and do you believe the resolution processes are effective and fair?
10. Safety and Well-being (C): Do you have any concerns about safety or well-being in the workplace? How does this impact your overall job satisfaction?
11. Job Redesign (A): Are there aspects of your job that you believe could be redesigned to improve efficiency or reduce stress? If so, what changes would you suggest?
12. Communication (I): How would you rate the communication channels within the restaurant, and do you think clear communication is a factor in the turnover issue?

These additional questions provide a comprehensive view of the factors affecting turnover by exploring various dimensions of the Behavior Engineering Model. You can use the responses to identify specific areas that require improvement and tailor your retention strategies accordingly.

Prompt:

I'm trying to perform a gap analysis using Gilbert's Behavior Engineering Model and I'm struggling on how to approach it. How is it different from a cause analysis?

Response:

Performing a gap analysis using Gilbert's Behavior Engineering Model is a systematic way to identify performance gaps and determine the underlying causes. It's important to understand the difference between a gap analysis and a cause analysis:

Gap Analysis:

- A gap analysis is the process of identifying the difference between current performance (actual performance) and desired or expected performance (target performance).
- It aims to answer the question: "What is the performance gap, and how large is it?"
- The primary focus is on understanding the difference in performance outcomes.

Cause Analysis:

- A cause analysis, on the other hand, delves deeper into understanding the root causes of the identified performance gap.
- It aims to answer the question: "Why is there a performance gap, and what is causing it?"
- The primary focus is on identifying the underlying factors, such as deficiencies in knowledge, skills, tools, or motivation, that contribute to the performance gap.

Here's a step-by-step approach to conducting a gap analysis using Gilbert's Behavior Engineering Model:

Define the Current Performance: Clearly define what the current or actual performance is. This might involve collecting performance data, conducting surveys, or observing employees in their work.

Define the Target Performance: Determine what the desired or expected performance should be. This often involves setting specific performance goals or benchmarks.

Calculate the Performance Gap: Calculate the difference between the current and target performance to quantify the performance gap. This can be done using metrics or performance indicators.

Identify the Performance Variables: Categorize the performance variables using Gilbert's model, which includes Data, Instruments, Incentives, Knowledge, Capacity, and Motives.

Analyze the Gap: Examine each performance variable to identify which factors might be contributing to the performance gap. This involves understanding the deficiencies or issues within each variable category.

Prioritize Factors: Determine which factors are most critical in contributing to the performance gap. Not all factors will be equally important, so prioritize them based on their impact.

Develop Strategies: Based on your analysis, develop strategies or interventions to address the identified performance gaps. These strategies may involve training, process improvements, changes in incentives, or other actions aimed at improving performance.

Implement and Monitor: Put your strategies into action and monitor their effectiveness. Continuously track performance to ensure that the gap is closing.

In summary, a gap analysis in Gilbert's model focuses on identifying the difference between current and target performance, while a cause analysis delves deeper into the underlying factors contributing to the performance gap. Both analyses are crucial in designing effective interventions to improve performance.

Prompt:

So the problem is that we are investigating a high turnover rate. This isn't a measure of performance, but it affects performance. How would a gap analysis work in this case?

Response:

You're correct that high turnover is not a direct measure of individual performance, but it can significantly impact overall organizational performance. In this case, a gap analysis can still be a valuable approach to understand the factors contributing to the high turnover rate and identify areas where there is a gap between the desired state (lower turnover) and the current state (high turnover).

Here's how you can adapt the gap analysis approach to address the issue of high turnover:

Define the Current Turnover Rate: Begin by quantifying and clearly defining the current turnover rate. You may calculate this rate based on the number of employees leaving the organization over a specific period.

Identify the Desired Turnover Rate: Determine what the desired or acceptable turnover rate should be. This can be based on industry benchmarks, organizational goals, or historical data if turnover has been lower in the past.

Calculate the Turnover Gap: Calculate the difference between the current turnover rate and the desired turnover rate. This quantifies the turnover gap.

Identify Contributing Factors: Explore the factors contributing to high turnover. This may involve conducting exit interviews with departing employees, surveys, and analyzing HR and management practices. Gilbert's model can help you categorize these factors:

- **Data:** Is there data available on why employees are leaving, and is it being effectively used for decision-making?
- **Instruments:** Are there tools, resources, or support mechanisms in place to retain employees?
- **Incentives:** Are the compensation, benefits, and work environment attractive enough to retain employees?
- **Knowledge:** Are employees adequately trained and skilled to perform their roles effectively?
- **Capacity:** Are there workload or resource issues contributing to turnover?
- **Motives:** What motivates employees to leave? Are there issues related to job satisfaction, workplace culture, or personal reasons?

Prioritize and Analyze Factors: Prioritize the factors contributing to high turnover and analyze them to understand the root causes. For example, if exit interviews reveal a lack of career development opportunities, this can be categorized under "Knowledge" and "Motives."

Develop Retention Strategies: Based on the analysis, develop strategies to address the identified factors contributing to high

turnover. This might involve changes in hiring practices, employee training and development, compensation packages, or workplace culture improvements.

Implement and Monitor: Put your retention strategies into action and closely monitor their impact on reducing turnover. Continue to assess the turnover rate over time and adjust your strategies as needed.

While high turnover isn't a direct measure of performance, addressing it is critical for overall organizational performance and effectiveness. A gap analysis can help you systematically identify and address the factors that contribute to high turnover and, in turn, improve your organization's performance.

How we used this:

- **The questions applied to each of the boxes in the BEM, so they were good overall.**
- **They were redundant with other questions we already had, so we merged them.**

B.3 Kickoff Meeting with Owner Questions

- What do you think the current cause of turnover is? What should be happening vs. what is actually happening?
- What will happen if the turnover rate is not fixed?
- What are some possible solutions to the turnover rate? Are these feasible? What would the costs be?
- Have you developed a strategy and organization-wide goals? Have they been communicated to everyone in the organization?
- Do you have process-level goals? (processes: shopping/inventory process, cooking process, customer service process)
- Are there any interferences between the process steps being managed?
- Do you obtain regular customer feedback and use it to track performance in relation to your goals?
- What are your experience requirements when hiring?
- What is done to clarify employee expectations in the role prior to being hired?
- Does the interview process weed out people that cannot handle the job due to lack of relevant skills and experience?
- What are your employees generally motivated by? Money, career advancement in the restaurant business, career advancement in other fields, etc.
- Are they young and just starting out? Or are they generally older with more life experience? Do they have families?
- Does the interview process weed out people who are only looking for a temporary job or who are not motivated by working in the restaurant business specifically?
- Are potential hires passionate about working in customer service and in the restaurant industry?
- Are employees paid competitively for their jobs in relation to comparable businesses that require the same level of knowledge and skill?
 - Are there pay raises for performance and milestones in time employed (e.g. after three months, one year, etc.)?
- Are they incentivized with things other than money, including but not limited to: increased responsibility (when wanted), flexible schedules, recognition of high performance, the ability to learn new skills/cross train in other positions, freedom to speak their mind and contribute ideas, advancement opportunities, insurance, etc.

- Do other similar restaurants have incentive programs to get employees to stay that you are aware of?
- Does your company offer growth opportunities? If so, what does that look like?
- How would you describe the work culture?
 - Is it strictly hierarchical? Do employees feel like part of a team? Do they have the ability to share their thoughts without fear of repercussions?
 - Do managers/supervisors treat those below them with respect? Do they make employees feel heard and valued?
 - Do employees get along?
 - Does management resolve conflicts and establish infrastructure to enable efficient and effective communication across departments?
 - Are good behaviors recognized and rewarded?
 - Are people treated consistently and fairly?
- How is the work-life balance for employees? Do they feel overworked?
- What training is currently being provided to new hires?
 - What informational training is provided? (what they should know)
 - What skills training is provided? (what they should do)
 - Are employees' roles and responsibilities clearly defined? Verbally and in writing?
 - Are workplace processes clearly explained and guides/job aids on hand for review?
- Are employees provided adequate feedback on their performance? Do they know what they are doing well and what they need to improve on?
 - Is there any inconsistency in expectations between different management/supervisors?
 - Do employees know how they can improve their performance?
 - Does the providing training make them aware of what exemplary performance looks like?
 - Are performance reviews and warnings for inadequate performance formally documented in writing or are they delivered informally?
- Do employees have adequate tools/resources to perform their role successfully?
- Do employees work in positions best suited to their talents? Do you try to match skills to the role that fits them best during interviews?

- Are any employees given responsibilities and duties that are too difficult for them?
 - Do any employees feel bored due to lack of challenge and growth opportunities?
 - Are they cross trained so that they can do other jobs on short notice if need be?
- Are safety and health policies clearly defined and followed?

B.4 Employee Interview Protocol (English/Spanish)

Participant:

Interviewer:

Date:

Introduction	
Thank you for participating in this project. In our study, we will interview up to ten employees of Tlayuda Querida to investigate the causes of high turnover of staff. The interview will last approximately 20 to 30 minutes. Your answers are confidential. We will not include your name or other identifying information in our report.	
Do you have any questions about the purpose of this research or the interview in general?	Notes:
Part 1: Demographic Information	
• How old are you? • Do you live with your parents or a partner? Do you have any children or anyone else that depends on you? Does your family depend on your earnings? • Could you please tell me about your work history? How many years of work experience do you have? How have your other jobs differed from your job at Tlayuda Querida?	

Part 2: Working Experience in Tlayuda Querida

Could you please describe your work experience at Tlayuda Querida?

- How would you rate your level of satisfaction?
- What motivates you to come to work every day?
- How is the salary compared to similar jobs in Oaxaca?
- Are there raises for performance and milestones in time employed?
- How does the restaurant support your growth to develop your professional and personal skills and knowledge?
- How do you balance your work and personal lives?
- Do you think the job impacts your personal life?
- How could your experience working at Tlayuda Querida be improved?

Part 3: The Restaurant Operations

How would you describe how the business functions?

- What are the goals of the restaurant/management for your role (e.g., number of customers served per hour, average customer count, table turn time)?
 - o Has the owner or supervisors communicated these goals to staff?
- How was the onboarding and training process?
- Are employee responsibilities clearly defined?
- Are performance expectations and standards clear?
- Do you receive feedback and recognition for your performance?
- Do you believe the expectations, standards, and reviews are fair and realistic?
- Do you have access to the necessary resources and tools (i.e., resource manuals, kitchen equipment, etc.) to do your best work and overcome challenges on the job?

• How do management and staff make sure you can get the job done right?	
Part 4: The Restaurant Culture	
How could you describe the workplace culture?	
• Do you feel comfortable approaching Rene, Deni, or other supervisors when you have a problem? • Do you feel the managers listen to your ideas and opinions and take them seriously? • How do the employees get along? • Some employees have left willingly. Why do you think that it?	
Conclusion	
Do you have anything that you would like to add about your experience in the restaurant?	
Summy and clarification	

Participant:

Interviewer:

Date:

Introduction	
Gracias por participar en este proyecto. En nuestro estudio, vamos a entrevistar hasta diez empleados de Tlayuda Querida para investigar las causas de alta rotación de personal. La entrevista va a durar aproximadamente 20 a 30 minutos. Sus respuestas son confidenciales. No vamos a incluir su nombre u otra información que pueda identificarle en nuestro informe.	
¿Tiene alguna pregunta sobre el propósito de esta investigación o la entrevista en general?	Notes:
Part 1: Demographic Information	
• ¿Cuántos años tiene? • ¿Vive con tus padres o pareja? ¿Tiene algún dependiente? ¿Dependen de sus ingresos para mantener a la familia? • ¿Me puedes contar sobre tu historia laboral? ¿Cuántos años de experiencia laboral tiene? ¿En qué se diferencian tus otros trabajos de tu trabajo actual (Tu trabajo en Tlayuda Querida)?	

Part 2: Working Experience in Tlayuda Querida

Describa su experiencia general trabajando en Tlayuda Querida.

- ¿Cuál es su nivel de satisfacción?
- ¿Qué se motiva a venir a trabajar todos los días?
- ¿Cómo es el salario en relación con otros trabajos comparables en Oaxaca?
- ¿Hay aumentos salariales por desempeño e hitos en el tiempo empleado?
- ¿Cómo apoya el restaurante tu crecimiento para desarrollar tus habilidades y conocimientos profesionales y personales?
- ¿Cómo gestiona el equilibrio entre la vida laboral y personal?
- ¿Siente que sus demandas laborales impactan su vida personal?
- ¿Cómo podría mejorar su experiencia trabajando aquí?

Part 3: The Restaurant Operations

¿Cómo describiría cómo funciona el negocio?

- ¿Cuáles son los objetivos del restaurante/dirección por tu rol (por ejemplo, número de clientes atendidos por hora, la cuenta promedio de clientes, tiempo de giro de la mesa)?
- ¿El dueño o supervisor le comunican estos objetivos al personal?
- ¿Cómo fue el proceso de incorporación y capacitación?
- ¿Tienen los empleados responsabilidades laborales claramente definidas?
- ¿Son claras las expectativas y los estándares de desempeño?
- ¿Recibes retroalimentación y reconocimiento por tu desempeño?
- ¿Crees que las expectativas, los estándares y los comentarios son justos y realistas?
- ¿Tiene acceso a los recursos y herramientas necesarios (es decir, manuales de recursos, equipos de cocina, etc.) para hacer su mejor trabajo y superar los desafíos en el trabajo?

• ¿Cómo se aseguran la gerencia y el personal de que pueda hacer bien el trabajo? • How do management and staff make sure you can get the job done right?	
Part 4: The Restaurant Culture	
¿Cómo describiría la cultura del lugar de trabajo?	
• ¿Te sientes cómodo acercándote a René, Deni u otros supervisores cuando tienes un problema? • ¿Sientes que tus gerentes te escuchan y toman en serio tus opiniones e ideas? • ¿Qué tan bien se llevan el personal entre ellos? • Algunos otros empleados se han ido voluntariamente. ¿Por qué crees que es así?	
Conclusion	
¿Hay algo que le gustaría añadir sobre su experiencia trabajando en el restaurante?	
Resumen y aclaración	

B.5 Final Interview with Owner Protocol (English/Spanish)

Participant:

Interviewer:

Date:

Introductions	
The goal of this discussion is to learn more about the processes in the business and what kinds of interventions you have tried in the past to improve the employee experience. Do you have any questions?	
Demographic Information (For Supervisor)	
When did you start working at Tlayuda Querida?	
Can you tell us about your work history and educational background?	
Onboarding and Training	
Have you tried doing onboarding/ training for employees in the past? (Could be at Tlayuda Querida or another business)	
No: What prevented you from trying it?	
Yes: What worked? What didn't work?	
Hiring and Monitoring Managers	
What do you look for in a	

manager?	
What kinds of questions do you ask in an interview, when looking for a manager?	
Have you considered promoting from within for lead/management positions?	
When you have a manager employed, how do you evaluate their performance?	
Are there any obstacles that you face when trying to hire for a supervisory position?	
Team Meetings and AARs	
Do you have regular team meetings?	
No: Why not?	
Yes: How often do you have them? Who is invited to the meetings? What do you discuss?	
Performance-based Raises and Bonuses	
Have you considered offering performance-based raises and bonuses to employees? Why or why not?	
Have you considered offering raises based on time milestones? Why or why not?	

Professional Development Opportunities	
Have you considered offering professional development opportunities to all employees based on their roles? Why or why not?	
Team Lead / Checklist	
Have you considered having a team lead for each department? (lead server, lead bartender, etc.)	
No: Why not?	
Yes: What went well? What went wrong?	
Have you considered having a checklist for each work area? (bar, bathroom, service, kitchen, etc.) Why or why not?	
Tracking Data	
Have you considered tracking additional data, such as shrink, cost of training new employees, etc.? Why or why not?	
Final Thoughts	
Are there any interventions or changes you're considering making to improve the restaurant or the employee experience?	
Do you have any questions about our	

study?	
Our next step is to gather more information through anonymous surveys. After that, we will analyze data and present our recommendations to you.	

Participant:

Interviewer:

Date:

Introducciones	
El objetivo de esta discusión es conocer mejor los procesos de la empresa y qué tipo de intervenciones ha probado en el pasado para mejorar la experiencia de los empleados. ¿Tiene alguna pregunta?	
Información demográfica (por supervisor)	
¿Cuándo empezó a trabajar en Tlayuda Querida?	
¿Puede contarnos sobre su historial laboral y educación?	
Incorporación y capacitación	
¿Ha intentado hacer onboarding / entrenamiento para empleados en el pasado? (Podría estar en Tlayuda Querida u otro negocio)	
No: ¿Qué le impidió intentarlo?	
Sí: ¿Qué funcionó? ¿Qué no funcionó?	
Contratación y seguimiento de gerentes y supervisores	
¿Qué busca en un	

gerente o supervisor?	
¿Qué tipo de preguntas hace en una entrevista, cuando busca un gerente?	
¿Ha considerado la posibilidad de promocionar desde dentro para puestos de gestión y líderes? (ex: líder de meseros, gerente)	
Cuando tiene un gerente empleado, ¿cómo evalúa su desempeño?	
¿Hay algún obstáculo que se enfrente al tratar de contratar para un puesto de supervisión?	
Reuniones de equipo y AARS	
¿Tiene reuniones de equipo regulares?	
No: ¿Por qué no?	
Sí: ¿Con qué frecuencia los tienes? ¿Quién está invitado a las reuniones? ¿De qué hablan?	
Aumentos y bonificaciones basados en el rendimiento	
¿Ha considerado ofrecer aumentos y bonificaciones basados en el rendimiento a los empleados? ¿Por qué o por qué no?	
¿Has considerado ofrecer aumentos basados en hitos de tiempo? ¿Por qué o por qué no?	

Oportunidades de desarrollo profesional	
¿Ha considerado ofrecer oportunidades de desarrollo profesional a todos los empleados en función de sus funciones? ¿Por qué o por qué no?	
Líder de equipo / lista de verificación	
¿Ha considerado tener un líder de equipo para cada departamento? (líder de meseros, líder de bar, etc.)	
No: ¿Por qué no?	
Sí: ¿Qué funcionó? ¿Qué no funcionó?	
¿Ha considerado tener una lista de tareas para cada área de trabajo? (bar, baño, servicio, cocina, etc.) ¿Por qué o por qué no?	
Recopilación de datos	
¿Ha considerado realizar un seguimiento de datos adicionales, como la pérdida del restaurante (shrink), el costo de la capacitación de nuevos empleados, etc.? ¿Por qué o por qué no?	
Últimos comentarios	
¿Hay alguna intervención o cambio que esté considerando hacer actualmente para mejorar el restaurante o la experiencia del	

empleado?	
¿Tiene alguna pregunta sobre nuestro estudio?	
Nuestro siguiente paso es recopilar más información a través de encuestas anónimas. Después de eso, analizaremos los datos y le presentaremos nuestras recomendaciones.	

A.4 Surveys (English & Spanish)

Tlayuda Querida Survey - Current Employees

Thank you for taking this survey. Its goal is to help improve workplace processes and employee satisfaction.

This survey is optional and anonymous. We will not include any information that can identify you in our report.

1. How long have you worked at Tlayuda Querida?

Mark only one oval.

- ☐ 1 month
- ☐ 2 months
- ☐ 3 months
- ☐ 4 months
- ☐ 5 months
- ☐ 6 months
- ☐ 7 months
- ☐ 8 months
- ☐ 9 months
- ☐ 10 months
- ☐ 11 months
- ☐ 12 months

2. What is your position at Tlayuda Querida?

Mark only one oval.

- ☐ Server
- ☐ Chef/Cook
- ☐ Bartender
- ☐ Host
- ☐ Barista
- ☐ Maintenance
- ☐ Assistant manager

3. How prepared do you feel in the event of an emergency (earthquake, fire, fights, etc.)?

Mark only one oval.

- ☐ Not at all prepared- the restaurant hasn't trained me for this at all
- ☐ A little unprepared
- ☐ A little prepared
- ☐ Very prepared- the restaurant provided formal emergency training

4. Please indicate your level of agreement with each statement regarding your experience at Tlayuda Querida.

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
The on-the-job training provided at the beginning of my employment prepared me to do my job well.	☐	☐	☐	☐	☐
I am satisfied with the career advancement opportunities available for me.	☐	☐	☐	☐	☐
Expectations and performance standards are clear and fair.	☐	☐	☐	☐	☐
I get regular feedback on my performance.	☐	☐	☐	☐	☐
The managers treat the employees with respect.	☐	☐	☐	☐	☐
I know how I can receive a raise, bonuses, and other benefits.	☐	☐	☐	☐	☐

Communication
between team
members
(including
across
departments) is
good.

☐☐☐☐☐

I know what I
should be doing
during
downtime.

☐☐☐☐☐

5. Please rank each criterion by their importance. For example, mark one choice as "Most Important," one as "Least Important," and the others with the other ranks in between. Each criterion should be chosen once.

Mark only one oval per row.

	Most Important	2nd Most Important	3rd Most Important	4th Most Important	5th Most Important	Least Important
Managers treat employees respectfully	☐	☐	☐	☐	☐	☐
A strong onboarding and training program	☐	☐	☐	☐	☐	☐
Professional development opportunities (ability to cross train, classes that the employer pays for, etc.)	☐	☐	☐	☐	☐	☐
Clear job expectations and performance reviews	☐	☐	☐	☐	☐	☐
Knowing how and when I can receive raises and bonuses	☐	☐	☐	☐	☐	☐
Clear communication between team members and different departments	☐	☐	☐	☐	☐	☐

6. What is the most important factor that motivates you to stay employed with a job (ANY job, not just Tlayuda Querida)?

7. Write the most important thing Tlayuda Querida needs to improve. Think of the restaurant's deficiencies but also things that other restaurants do or provide that you think Tlayuda Querida should do.

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Tlayuda Querida Survey - Former Employees

Thank you for taking this survey. Its goal is to help improve workplace processes and employee satisfaction.

This survey is optional and anonymous. We will not include any information that can identify you in our report.

1. How long did you work at Tlayuda Querida?

Mark only one oval.

- ☐ 1 month
- ☐ 2 months
- ☐ 3 months
- ☐ 4 months
- ☐ 5 months
- ☐ 6 months
- ☐ 7 months
- ☐ 8 months
- ☐ 9 months
- ☐ 10 months
- ☐ 11 months
- ☐ 12 months

2. What was your position at Tlayuda Querida?

Mark only one oval.

- ☐ Server
- ☐ Chef/Cook
- ☐ Bartender
- ☐ Host
- ☐ Barista
- ☐ Maintenance
- ☐ Assistant manager

3. How prepared did you feel in the event of an emergency (earthquake, fire, fights, etc.)?

Mark only one oval.

- ☐ Not at all prepared- the restaurant hasn't trained me for this at all
- ☐ A little unprepared
- ☐ A little prepared
- ☐ Very prepared- the restaurant provided formal emergency training

4. Please indicate your level of agreement with each statement regarding your experience at Tlayuda Querida.

Mark only one oval per row.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
The on-the-job training provided at the beginning of my employment prepared me to do my job well.	☐	☐	☐	☐	☐
I was satisfied with the career advancement opportunities available for me.	☐	☐	☐	☐	☐
Expectations and performance standards were clear and fair.	☐	☐	☐	☐	☐
I got regular feedback on my performance.	☐	☐	☐	☐	☐
The managers treated the employees with respect.	☐	☐	☐	☐	☐
I knew how I can receive a raise, bonuses, and other benefits.	☐	☐	☐	☐	☐
Communication between team members (including across departments) was good.	☐	☐	☐	☐	☐

**I knew what I
should be doing
during downtime.**

☐☐☐☐☐

5. Please rank each criterion by their importance. For example, mark one choice as "Most Important," one as "Least Important," and the others with the other ranks in between. Each criterion should be chosen once.

Mark only one oval per row.

	Most Important	2nd Most Important	3rd Most Important	4th Most Important	5th Most Important	Least Important
Managers treat employees respectfully	☐	☐	☐	☐	☐	☐
A strong onboarding and training program	☐	☐	☐	☐	☐	☐
Professional development opportunities (ability to cross train, classes that the employer pays for, etc.)	☐	☐	☐	☐	☐	☐
Clear job expectations and performance reviews	☐	☐	☐	☐	☐	☐
Knowing how and when I can receive raises and bonuses	☐	☐	☐	☐	☐	☐
Clear communication between team members and different departments	☐	☐	☐	☐	☐	☐

6. What is the most important factor that motivates you to stay employed with a job (ANY job, not just Tlayuda Querida)?

7. Write the most important thing Tlayuda Querida needs to improve. Think of the restaurant's deficiencies but also things that other restaurants do or provide that you think Tlayuda Querida should do.

8. Why did you stop working at Tlayuda Querida?

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Tlayuda Querida Encuesta - Empleado Actual

Gracias por participar en esta encuesta. Su objetivo es ayudar a mejorar los procesos laborales y la satisfacción de los empleados. Esta encuesta es opcional y anónima. No vamos a incluir información que pueda identificarle en nuestro informe.

1. ¿Cuánto tiempo ha trabajado en Tlayuda Querida?

Mark only one oval.

- ☐ 1 mes
- ☐ 2 meses
- ☐ 3 meses
- ☐ 4 meses
- ☐ 5 meses
- ☐ 6 meses
- ☐ 7 meses
- ☐ 8 meses
- ☐ 10 meses
- ☐ 11 meses
- ☐ 12 meses

2. ¿Cuál es su puesto en Tlayuda Querida?

Mark only one oval.

- ☐ Mesero/a
- ☐ Chef o Cocinero/a
- ☐ Bartender
- ☐ Hostess
- ☐ Barista
- ☐ Encargado de compras
- ☐ Subgerente asistente

3. ¿Qué tan preparado/a se siente en caso de una emergencia (terremoto, incendio, peleas, etc.)?

Mark only one oval.

- ☐ No estoy para nada preparado/a. El restaurante no me ha proporcionado entrenamiento para esto en absoluto.
- ☐ Un poco desprevenido/a
- ☐ Un poco preparado/a
- ☐ Muy preparado/a. El restaurante proporcionó capacitación formal en casos de emergencia.

4. Indica su nivel de acuerdo con cada afirmación con respecto a su experiencia en Tlayuda Querida.

Mark only one oval per row.

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo
La capacitación en el trabajo proporcionada al inicio de mi empleo me preparó adecuadamente para realizar mi trabajo.	☐	☐	☐	☐	☐
Estoy satisfecho/a con las oportunidades de avance profesional disponibles para mí.	☐	☐	☐	☐	☐
Las expectativas y los estándares de rendimiento son claros y justos.	☐	☐	☐	☐	☐
Recibo comentarios regulares sobre mi desempeño.	☐	☐	☐	☐	☐
Los gerentes tratan a los empleados con respeto.	☐	☐	☐	☐	☐
Sé cómo puedo recibir un aumento, bonificaciones y otros beneficios.	☐	☐	☐	☐	☐

**La comunicación
entre los
miembros del
equipo
(incluyendo entre
departamentos)
es buena.**

☐☐☐☐☐

**Sé qué debería
estar haciendo
durante los
períodos de
inactividad.**

☐☐☐☐☐

5. Por favor, clasifica cada criterio por su importancia. Por ejemplo, marca una opción como 'El más Importante', otra como 'El menos Importante' y las demás con los otros rangos intermedios. Solo se debe elegir un criterio por opción.

Mark only one oval per row.

	El más importante	El segundo más importante	El tercero más importante	El cuarto más importante	El quinto más importante	El menos importante
Los gerentes tratan a los empleados con respeto	☐	☐	☐	☐	☐	☐
Un programa sólido de integración y formación	☐	☐	☐	☐	☐	☐
Oportunidades de desarrollo profesional (posibilidad para recibir capacitación de otros puestos, clases que paga el empleador, etc.)	☐	☐	☐	☐	☐	☐
Expectativas laborales claras y revisiones de desempeño	☐	☐	☐	☐	☐	☐
Saber cómo y cuándo puedo recibir aumentos y bonificaciones	☐	☐	☐	☐	☐	☐
Comunicación clara entre miembros del equipo y diferentes departamentos	☐	☐	☐	☐	☐	☐

-
-
6. ¿Cuál es el factor más importante que lo motiva a mantener su empleo en un trabajo (cualquier trabajo, no solo en Tlayuda Querida)?

7. Escribe la cosa más importante que Tlayuda Querida necesita mejorar. Piensa en las deficiencias del restaurante, pero también en cosas que otros restaurantes hacen o proporcionan que cree que Tlayuda Querida debería hacer.

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Tlayuda Querida Encuesta - Empleado Anterior

Gracias por participar en esta encuesta. Su objetivo es ayudar a mejorar los procesos laborales y la satisfacción de los empleados. Esta encuesta es opcional y anónima. No vamos a incluir información que pueda identificarle en nuestro informe.

1. ¿Cuánto tiempo trabajó en Tlayuda Querida?

Mark only one oval.

- ☐ 1 mes
- ☐ 2 meses
- ☐ 3 meses
- ☐ 4 meses
- ☐ 5 meses
- ☐ 6 meses
- ☐ 7 meses
- ☐ 8 meses
- ☐ 9 meses
- ☐ 10 meses
- ☐ 11 meses
- ☐ 12 meses

2. ¿Cuál era su puesto en Tlayuda Querida?

Mark only one oval.

- ☐ Mesero/a
- ☐ Chef o Cocinero/a
- ☐ Bartender
- ☐ Hostess
- ☐ Barista
- ☐ Encargado de compras
- ☐ Subgerente asistente

3. ¿Qué tan preparado/a sentía sent en caso de una emergencia (terremoto, incendio, peleas, etc.) en Tlayuda Querida?

Mark only one oval.

- ☐ No estaba para nada preparado/a. El restaurante no me había proporcionado entrenamiento para esto en absoluto.
- ☐ Un poco desprevenido/a
- ☐ Un poco preparado/a
- ☐ Muy preparado/a. El restaurante proporcionó capacitación formal en casos de emergencia.

4. Indica su nivel de acuerdo con cada afirmación con respecto a su experiencia en Tlayuda Querida.

Mark only one oval per row.

	Totalmente en desacuerdo	En desacuerdo	Ni de acuerdo ni en desacuerdo	De acuerdo	Totalmente de acuerdo
La capacitación en el trabajo proporcionada al inicio de mi empleo me preparó adecuadamente para realizar mi trabajo.	☐	☐	☐	☐	☐
Estaba satisfecho/a con las oportunidades de avance profesional disponibles para mí.	☐	☐	☐	☐	☐
Las expectativas y los estándares de rendimiento eran claros y justos.	☐	☐	☐	☐	☐
Recibía comentarios regulares sobre mi desempeño.	☐	☐	☐	☐	☐
Los gerentes trataban a los empleados con respeto.	☐	☐	☐	☐	☐
Sabía cómo podía recibir un aumento, bonificaciones y otros beneficios.	☐	☐	☐	☐	☐

**La
comunicación
entre los
miembros del
equipo
(incluyendo
entre
departamentos)
era buena.**

☐☐☐☐☐

**Sabía lo que
debería haber
estado haciendo
durante los
períodos de
inactividad.**

☐☐☐☐☐

5. Por favor, clasifica cada criterio por su importancia. Por ejemplo, marca una opción como 'El más Importante', otra como 'El menos Importante' y las demás con los otros rangos intermedios. Solo se debe elegir un criterio por opción.

Mark only one oval per row.

	El más importante	El segundo más importante	El tercero más importante	El cuarto más importante	El quinto más importante	El menos importante
Los gerentes tratan a los empleados con respeto	☐	☐	☐	☐	☐	☐
Un programa sólido de integración y formación	☐	☐	☐	☐	☐	☐
Oportunidades de desarrollo profesional (posibilidad para recibir capacitación de otros puestos, clases que paga el empleador, etc.)	☐	☐	☐	☐	☐	☐
Expectativas laborales claras y revisiones de desempeño	☐	☐	☐	☐	☐	☐
Saber cómo y cuándo puedo recibir aumentos y bonificaciones	☐	☐	☐	☐	☐	☐
Comunicación clara entre miembros del equipo y diferentes departamentos	☐	☐	☐	☐	☐	☐

-
-
6. ¿Cuál es el factor más importante que lo motiva a mantener su empleo en un trabajo (cualquier trabajo, no solo en Tlayuda Querida)?

7. Escribe la cosa más importante que Tlayuda Querida necesita mejorar. Piensa en las deficiencias del restaurante, pero también en cosas que otros restaurantes hacen o proporcionan que cree que Tlayuda Querida debería hacer.

8. ¿Por qué dejó de trabajar en Tlayuda Querida?

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Google Forms

8.3 Appendix C: Informed Consent Form (English/Spanish)



BOISE STATE UNIVERSITY

INFORMED CONSENT

Study Title: Needs Assessment Turnover at a Restaurant in Mexico

Principal Investigator: Karyna Mangusheva

Co-Investigator: Name Roshi Patel, Lizzie Merrill, Adam Minahan

Sponsor: Boise State University, College of Engineering, Dept. of Organizational Performance & Workplace Learning (OPWL): OPWL 529, Needs Assessment

This consent form will give you the information you will need to understand why this needs assessment is being done and why you are being invited to participate. It will also describe what you will need to do to participate as well as any known risks, inconveniences or discomforts that you may have while participating. We encourage you to ask questions at any time. If you decide to participate, you will be asked to sign this form and it will be a record of your agreement to participate. You will be given a copy of this form to keep.

☐ **PURPOSE AND BACKGROUND**

You are invited to participate in a needs assessment to investigate the causes of high turnover at **Tlayuda Querida**, a restaurant in Oaxaca, Mexico.

☐ **PROCEDURES**

If you agree to be in the study, you will be asked to participate in an interview(s) with members of our team, followed up by a survey at a later date.

☐ **PROCEDURES**

At a time that is convenient for you, an interview will be conducted either in person or virtually. In the case of a virtual interview, the interview may be recorded and transcribed. Your identification will be protected and remain confidential. When the results of the data collection are shared, no identifying information (name, address, etc.) will be released to the public. All identifying information will be deleted from our servers. Information such as age or position may be shared if it can be done in a manner that protects your privacy and confidentiality.

In addition, you may be asked to participate in a survey. The surveys will not ask for any personal identifiable information such as your name or address. Your age and position may be asked but these will only be shared with the data if your identity is able to be protected. For example, if only one supervisor is interviewed, the data results will not say "One supervisor answered ..."

☐ **RISKS**

Some of the questions asked may make you uncomfortable or upset. You are always free to decline to answer any question or to stop your participation at any time. Should you feel

discomfort after participating and you are a Boise State University student, you may contact the University Health Services (UHS) for counseling services at (208) 426-1459. UHS is located on campus in the Norco Building, 1529 Belmont Street, Boise ID, 83706.

☐ **BENEFITS**

There will be no direct benefit to you from participating in this study. However, the information that you provide may help **Tlayuda Querida** reduce employee turnover and correct any issues that are the current causes of high turnover.

☐ **EXTENT OF CONFIDENTIALITY**

Reasonable efforts will be made to keep the personal information in your research record private and confidential. Any identifiable information obtained in connection with this study will remain confidential and will be disclosed only with your permission or as required by law. Under normal conditions, only members of the needs assessment project team, and the course instructor will have access to data.

Your name will not be used in any written reports or publications which result from this project, unless you have given explicit permission for us to do this. However, the results of the interview and survey based on the information you provide may be shared anonymously in the team members' public portfolios as well as with the owner of **Tlayuda Querida**.

☐ **PAYMENT/COMPENSATION**

There is no compensation for your participation in this project.

☐ **PARTICIPATION IS VOLUNTARY**

You do not have to be involved in this project if you do not want to be. If you volunteer to contribute to this project, you may withdraw from it at any time without consequences of any kind or loss of benefits to which you are otherwise entitled.

☐ **QUESTIONS**

If you have any questions or concerns about your participation in this study, you should first contact the project leader at karynamangusheva@u.boisestate.edu or by calling or messaging 5526891830.

DOCUMENTATION OF CONSENT

I have read this form and decided that I will participate in the project described above. Its general purposes, the particulars of involvement and possible risks have been explained to my satisfaction. I understand I can withdraw at any time. I have received a copy of this form.

Printed Name of Project Participant

Signature of Project Participant

Date

Signature of Person Obtaining Consent

Date



BOISE STATE UNIVERSITY

FORMULARIO DE CONSENTIMIENTO INFORMADO

Título de Estudio: Evaluación de las Necesidades: Rotación de Empleados en un Restaurante en México

Investigador principal: Karyna Mangusheva

Co-Investigadores: Roshi Patel, Lizzie Merrill, Adam Minahan

Patrocinador: Universidad de Boise State, Facultad de Ingeniería, Departamento de Desempeño Organizacional y Aprendizaje de Lugar de Trabajo: [Título del curso] OPWL 529, Evaluación de Necesidades

Este formulario de consentimiento le dará la información que necesitará para entender por qué se está realizando esta evaluación de necesidades y por qué se le invita a participar. También describirá lo que deberá hacer para participar, así como cualquier riesgo, inconveniente o incomodidad conocida que pueda tener al participar. Le animamos a hacer preguntas en cualquier momento. Si decide participar, se le pedirá que firme este formulario y será un registro de su acuerdo para participar. Se le dará una copia de este formulario para que la conserve.

☐ **PROPÓSITO Y ANTECEDENTES**

Le invitamos a participar en una evaluación de necesidades para investigar las causas de la alta rotación en **Tlayuda Querida**, un restaurante en Oaxaca, México.

☐ **PROCEDIMIENTOS**

Si acepta participar en el estudio, se le pedirá que participe en una entrevista con miembros de nuestro equipo, seguida de una encuesta en una fecha posterior.

☐ **PROCEDIMIENTOS**

En un momento que sea conveniente para usted, una entrevista se llevará a cabo ya sea en persona o virtualmente. En el caso de una entrevista virtual, la entrevista puede ser grabada y transcrita. Su identificación será protegida y seguirá siendo confidencial. Cuando se compartan los resultados de la recopilación de datos, no se divulgará al público ninguna información de identificación (nombre, dirección, etc.). Toda la información de identificación será eliminada de nuestros servidores. La información como la edad o la posición puede compartirse si se puede hacer de una manera que proteja su privacidad y confidencialidad.

Además, es posible que se le pida que participe en una encuesta. Las encuestas no solicitarán ninguna información de identificación personal, como su nombre o dirección. Su edad y posición pueden ser preguntados, pero estos solo se compartirán con los datos si su identidad puede ser protegida. Por ejemplo, si solo un supervisor es entrevistado, los resultados de los datos no dirán “un supervisor respondió ...”

☐ **RIESGOS**

Algunas de las preguntas formuladas pueden hacer que se sienta incómodo o molesto. Usted siempre es libre de negarse a responder cualquier pregunta o de detener su participación en cualquier momento.

☐ **BENEFICIOS**

La participación en este estudio no le beneficiará directamente. Sin embargo, la información que usted proporcione puede ayudar a **Tlayuda Querida** a reducir la rotación de empleados y corregir cualquier problema que sea la causa actual de la alta rotación.

☐ **ALCANCE DE LA CONFIDENCIALIDAD**

Se harán esfuerzos razonables para mantener la información personal en su registro de investigación privada y confidencial. Cualquier información identificable obtenida en relación con este estudio seguirá siendo confidencial y se divulgará solo con su permiso o según lo requiera la ley. En condiciones normales, solo los miembros del equipo del proyecto de evaluación de necesidades y el instructor del curso tendrán acceso a los datos.

Su nombre no será utilizado en ningún informe escrito o publicación que resulte de este proyecto, a menos que usted nos haya dado permiso explícito para hacerlo. Sin embargo, los resultados de la entrevista y la encuesta basados en la información que proporcione pueden compartirse de forma anónima en los portafolios públicos de los miembros del equipo, así como con el propietario de **Tlayuda Querida**.

☐ **PAGO/COMPENSACIÓN**

No hay compensación por su participación en este proyecto.

☐ **LA PARTICIPACIÓN ES VOLUNTARIA**

No tiene que estar involucrado en este proyecto si no quiere. Si se ofrece como voluntario para contribuir a este proyecto, puede retirarse del mismo en cualquier momento sin consecuencias de ningún tipo o pérdida de beneficios a los que normalmente tuviera derecho.

☐ **PREGUNTAS**

Si tiene alguna pregunta o inquietud sobre su participación en este estudio, primero debe comunicarse con la investigadora principal Karyna Mangusheva al siguiente correo: karynamangusheva@u.boisestate.edu o llamando o enviando un mensaje al 5526891830.

CONSENTIMIENTO INFORMADO ESCRITO

He leído este formulario y he decidido que participaré en el proyecto descrito anteriormente. Sus propósitos generales, las particularidades de la participación y los posibles riesgos han sido explicados a mi satisfacción. Entiendo que puedo retirarme en cualquier momento. He recibido una copia de este formulario.

Nombre del participante en letra de imprenta

Firma del participante

Fecha

Firma del la persona que obtuvo el consentimiento

Fecha

8.4 Appendix D: Data Collection Planning Table

<i>Presented Problem or Opportunity</i>		
Framework / Model	Key Questions and Analysis	Data Collection
Harless' Front-End Analysis	Do you have performance objectives for the organization? Are you able to meet them? → The owner specified the following organizational goals: ◆ 40,000 MXN (Mexican pesos) sales of food and drinks on Friday/Saturday nights (current is 20,000 MXN) ◆ 80 people served for dinner on Friday/Saturday nights (current is 45) ◆ 1,000 MXN bill per person on average on the weekends (current is 500 MXN) ◆ 15,000 MXN sales of food and drinks on other nights (current is 10,000 MXN) ◆ To be listed in the top restaurants of Mexico (la Guía México Gastronómico) ◆ Desired willing turnover rate: annual = 15-20% (indicated by the owner - but is it realistic?) → In another interview with the owner, we learned that all of the above numbers are approximate. No detailed records exist of sales per day, average ticket value per customer, etc. What are the desired and actual performance standards? What should be happening vs. what is actually happening? → Current turnover: Annual = 103.47% (extrapolated from nine months of data) → Desired turnover: Annual = 15-20% (indicated by the owner - but is it realistic?) What is the turnover of other restaurants in the area? → We are still waiting on some data that will help us answer this. Due to businesses in the area preparing for the Day of the Dead, there has been a delay in receiving data. Do we have a problem? → Yes. The turnover rate is unacceptably high, according to the owner. We are still waiting to compare the restaurant's turnover rate to other restaurants.	Dates of Collection: 9/13-10/29 Sources: ☒ Client ☒ Executives/ leaders (Assistant manager and chef) ☒ Other: Restaurant owners in Oaxaca de Juárez Methods: ☒ Interviews ☒ Individual Specify: We will interview the owner about the perceived problems in the restaurant. Due to a lack of docu-

	Do we have a performance problem? → High turnover is not necessarily a performance problem, but it can affect the restaurant's overall performance and influence individual performance. See: "What will happen if the turnover rate is not fixed?" What do the owner and supervisor-level employees think the current cause of turnover is? → The owner thinks that one possible cause of high turnover is that it's easier to find people who want to work in coffee shops than in restaurants. ◆ We could do a 5 Why's Analysis. → The owner also specified that finding and hiring staff has been difficult. Training is also limited for this reason - why invest in employees if they are going to leave quickly? ◆ If we carry out a quality needs assessment, we may be able to provide interventions that reduce attrition and give a reason to invest in employees. What will happen if the turnover rate is not fixed? → The high turnover rate affects the business in several ways: ◆ Lost investment of time and money training employees who leave ◆ Insurance continues to be paid for employees for a week after they leave ◆ Time and money to hire new employees, onboard, and train them ● Note about employee onboarding: there is no formal training or onboarding procedure beyond 1-2 days of job shadowing for servers and it's not possible to quantify how much it costs. ◆ In the case of newly hired cooks, a lot of ingredients are wasted during training and the first months of work. In turn, inconsistent food makes customers unsatisfied. ◆ New cooks and bartenders are much slower in preparing food and drinks, making customers unsatisfied. ◆ When a new chef is hired, the menu has to be redone and kitchen staff tend to leave as well. The previous chef had created several recipes that he took with him and the new chef and owner had to create new dishes to replace them. We could not get answers to why the last chef and cook left because we were not allowed to interview them per the owner's request.	mentation, we will also reconstruct documentation (turnover rates, tenure of employees) by interviewing the owner. ☒ Other: Since limited data exists on turnover in Mexico and this particular area, we will ask the owner to ask his contacts in the restaurant industry about turnover in their restaurants (annual and the high season: Oct-Dec).
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	♦ Bad managers cause employees to leave. (In the past year, there have been three managers.) - our interviews with departed employees confirmed this. However, current employees are happy with the management. How will we know if the problem is fixed? → We are still waiting on data that will help us answer this more accurately. Currently, the owner and assistant manager are busy preparing for the Day of the Dead and not available for interviews.	
Notes → We decided to focus only on willing turnover (employees who chose to leave the job and were not fired). → Besides turnover, we could look into feedback ratings in Google Maps and sales.		

Organizational Analysis		
Framework / Model	Key Questions and Analysis	Data Collection
Rummler-Brache Nine Boxes Model	What are the organization's goals and what are its strategies to achieve them? → See the "Presented Problem or Opportunity" section for organizational goals. What is the organizational structure? → The organization is hierarchical but rather flat. → See Figure 1 in the Client Organization section. Does the business have process-level goals? → The owner stated that he has been working on improving inventory processes for the last 3 months to reduce shrinkage. Also, there is a system in place to meet the kitchen's goal of preparing the dishes to serve within 10 minutes. What is the management culture?	Dates of Collection: 9/19-11/11 Sources: ☒ Client (owner) ☒ Executives/leaders Specify: Assistant manager and chef ☒ Target population Specify: Employees

	→ It's a fast-paced and busy environment. → According to the owner, it's a friendly environment without a lot of conflict. → From our first two interviews with current employees, we have an agreement that the current culture is familial, supportive, comfortable and without a lot of conflict. One employee indicated that with the previous manager, they felt sad and they felt that the team was divided and not harmonious. We will continue to explore this with further interviews. → From our first two interviews with current employees, our sources have stated that sometimes employees stand around and do nothing, and it frustrates them (they suggested that it was because they don't know what to do or because there are no intermediate managers like a lead server). → The owner describes himself as strict, but approachable. He said employees go to their immediate supervisor first because they "don't want to bother him." ◆ So far in our interviews, respondents have stated that they are comfortable coming to either the owner or immediate supervisor for help. → Over the past 12 months, there have been three managers, one of which was too relaxed and the other was too harsh. This is something that we could analyze against the turnover, ratings and/or sales trends. There are no distinct performance expectations for managers. How does the organization monitor and evaluate performance? → The owner stated that he used to reward employees for good team performance in his other business, but hasn't done it in the restaurant. Currently, there is not a formal structure for evaluating and monitoring performance. → From our first two interviews with current employees, we confirmed that their performance is not monitored and no performance goals have been set for any role. No performance evaluations are being done.	We were able to recruit 6 current employees (which include 2 boomerangs) and 3 departed employees agreed to participate, out of a total of 12 possible candidates. Methods: ☑ Interviews ☑ Individual Interviews will vary depending on information sought. For discrete information, we will ask specific questions. However, for other data, we will start with open-ended questions to make sure we capture any information that we are not anticipating.
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Environmental Analysis

Framework / Model	Key Questions and Analysis	Data Collection
Rummler-Brache Nine Boxes Model	Does ownership and management have the necessary data about their employee satisfaction, plans for the future, and comfort doing their jobs to have an informed perspective on whether or not employees will quit and act accordingly? → The client has opinions on employee satisfaction, goals, etc., but does not have hard data collected via structured interviews, surveys, etc. Does management have turnover data and know it's too high? → When the client came to us, they did not have the turnover number, but they felt it was too high. We arrived at the numbers by interviewing the client and finding out which employees left and what times (they didn't have this on file, only in their memory). Now they have the data. However, we are still waiting on turnover data from other restaurants in Oaxaca to get realistic expectations. Does management give out performance reviews? → From the early interviews, it does not appear they give out structured reviews. However, employees are informed of poor and good performance informally and often. How is the management culture? → There was a manager who was described as a bully who created a very toxic work environment. Two employees left because of her maltreatment. → Currently, all employees are describing management as very friendly and approachable. Employees feel valued. Are there any indications in deficiency in the workplace processes? → One employee indicated poor communication between teams so it can be difficult to coordinate things. → Servers sometimes feel their goal is to satisfy customers but they often are not aided/told they can't be accommodated by other staff (kitchen, bar).	Dates of Collection: 9/19-11/11 Sources: ☒ Client ☒ Executives/leaders Specify: Assistant manager and chef ☒ Target population Specify: Employees (current and former) We were able to recruit 6 current employees (which include 2 boomerangs) and 3 departed employees agreed to participate, out of a total of 12

	→ Because the atmosphere is very friendly and familial, they often spend downtime talking. Sometimes they are just unsure what to do during downtime. This leads to a lack of preparation once the rush hour hits.	possible candidates
Chevalier's Updated Behavior Engineering Model	Do employees know how their performance is? Are they receiving feedback? → There is feedback, both positive feedback and recommendations for improvement. However, it is not documented in writing. → From the early interviews, employees are not aware of established metrics on number of guests served per hour, guest average check per person, table turn time, etc., so they don't know how their performance stacks up against them. Do employees have the necessary resources to carry out their jobs well enough to feel confident and not to feel stressed? → From early interviews, employees have suggested adding additional staff members to help with the workload, such as assistants and runners (carrying dishes from the kitchen upstairs). ◆ Carrying dishes from the kitchen upstairs could increase physical and emotional stress. → The bartender has indicated that he would like an assistant. → The overall impression from early interviews is that they have the tools and resources to do their jobs. However, there are additional things that they would like. These include: ◆ A radio so staff can communicate easily between the two floors ◆ A longer bar with more space ◆ Extra freezer ◆ More strainers ◆ An extractor in the kitchen (there is currently no extractor) ◆ Better ventilation in the kitchen → Employees are able to request additional tools if they can explain why they need them and how it will benefit their job/the restaurant. Are managers incentivized to make sure employees are satisfied and want to remain employed with the restaurant? → The client is dissatisfied with how many employees leave willingly but we are unsure if he has communicated this dissatisfaction and a strategy to remedy the situation to his current supervisors. We have yet to interview the supervisor.	Methods: ☑ Interviews ☑ Individual Interviews will vary depending on information sought. For discrete information, we will ask specific questions. However, for other data, we will start with open-ended questions to make sure we capture any information that we are not anticipating

- ◆ From our interviews, there was one supervisor who either did not know the turnover rate was unacceptable or did not care, as they were described as a bully who created a toxic work environment. This supervisor was fired. Two employees left the restaurant due to this person's behavior.

Are employees sufficiently incentivized to remain employed with the restaurant?

- Employees are given medical insurance while many other employers don't provide it (even though they are legally bound to).
- From our early interviews, employees overwhelmingly agree that the work environment is friendly, even familial, and it contributes to their job satisfaction.
 - ◆ There was a former supervisor who created a toxic work environment but they are no longer working with the restaurant.
- From our early interviews, it has been suggested that employees may leave because of a lack of professional development and advancement opportunities.
- Employees cite creative freedom as an incentive to remain employed (one employee left and returned based on this criteria, which they didn't have at their other jobs).
- One employee cited a flexible schedule.
 - ◆ Others did not, so we would like to follow up to find out if this was a special privilege for this one employee.
- The owner and one supervisor are cited as being very supportive and easily approachable. Employees feel their ideas and opinions are listened to and taken seriously.
- The owner pays for 50% of one employee's English lessons (English is helpful to interact with international guests in the restaurant). No other employees have indicated they have received this (it appears one must ask for it).
- The pay is generally said to be very good, which includes overtime and tips (these are not always provided to employees in other restaurants in the area).
 - ◆ One employee disagreed. They are a young parent and previously worked as a teacher, so they have different needs and expectations.
 - We are trying to track satisfaction with pay to the age of employees and whether or not they have dependents.
- Employees are not aware of salary raises for performance or milestones in time employed. However, some employees have asked for raises and they received them.

	→ Ownership allows servers to try the food and drinks so they can know more about them and make recommendations to customers. → One employee mentioned wanting to see the business grow and that they want to grow with the business.	
Judith Hale's Dynamics of Performance	How does the “marketplace” (political, social, infrastructural, environmental and competition factors) impact the performance of the organization? → From an interview with the owner, we discovered the following marketplace factors that are affecting the restaurant: → Political ◆ Changes in regulations regarding terraces in Centro ● The terrace was closed in March and modified to comply with regulations in April (this was not applied evenly to all restaurants due to corruption). ○ These repairs were very costly and the restaurant lost a lot of business because customers prefer the terrace to the lower level. ◆ Change in minimum wage - from 160 to 220 MXN per day, an almost a 40% increase - starting January 2023 ◆ Change in the price of insurance price - from 2,500 to 3,500 per person per month, a 40% increase - starting January 2023 ◆ Change in the minimum days of paid vacation - from 6 days to 12 days, a 100% increase - starting January 2023 ◆ Change in holiday working pay - from 2x to 3x regular salary - starting January 2023 → Social ◆ Protests and bloqueos (protesters blocking roads) happen frequently, which makes it difficult for employees to arrive at work, shopping to be done, etc. → Infrastructure ◆ The government doesn't provide water services, so private services must be used. Sometimes the restaurant runs out of water during a time when private water services don't deliver. ● This is a problem for all businesses in Oaxaca. ◆ Blackouts happen regularly, especially during the rainy season and after earthquakes. → New competitors ◆ Not an issue	

	→ Environmental disruptions ◆ Effects of inflation: January - May: up 25% from the prices from 2022 (now down to 10%) ◆ Oaxaca is located in a seismic zone, which means that earthquakes happen frequently. The buildings in the centro are historical and not built to modern standards for seismic zones. Earthquakes can cause damage to the building, blackouts and customers leaving (due to being afraid).	
Notes		
→ Employees must monetarily reimburse the restaurant for accidental damages caused. ◆ This is normal in Mexico.		

Gap Analysis		
Framework / Model	Key Questions and Analysis	Data Collection
Harless' Front-End Analysis	What is the current and desired willing turnover rate? What is the gap? → Current willing turnover rate: monthly = 8.62%, annual = 103.47% (extrapolated from the past 9 months) → Desired willing turnover rate: monthly ?, annual = 15-20% (stated by the owner) → The gap for annual turnover rate is 83.47-88.47% Is there data available that indicates general causes for why employees are leaving, and is it being effectively used for decision-making? → According to the owner, there is no data on why employees are leaving.	Dates of Collection: 9/19-11/11 Sources: ☑ Client ☑ Executives/leaders Specify: Assistant manager and chef ☑ Target population Specify: Employees We were able to recruit 6 current employees (which include 2

Chevalier's Updated Behavior Engineering Model	Are there tools, resources, or support mechanisms in place to retain employees? → There are no tools, resources or support systems in place to retain employees. Do employees have the intellectual and physical capacity to do their jobs? Do they leave because they feel they cannot handle the work? → This is a very delicate question to ask people point blank. ◆ Observation and performance data would be the best way to answer this question. • We cannot observe employees who left willingly because the time has passed. • There is no available data that demonstrates the performance capabilities of former employees (or current for that matter). ○ We only have the word of the client. He may be biased. Does ownership and management facilitate capacity to do the jobs by offering flexible scheduling or other accommodations? → One employee did indicate they had a flexible schedule but others did not indicate that they did. ◆ This employee is older than the others. We will ask the client if flexibility of scheduling is given to people with certain considerations. ◆ The owner pays for 50% of English lessons for one employee (only after the employee requested it). English is useful to communicate with international guests at the restaurant. → Another employee said they were given permission to be late or change a schedule when they had other commitments Are the compensation, benefits, and work environment attractive enough to retain employees? → According to our interviews, most employees are happy or very happy with their compensation, which includes overtime and tips (these are not always provided to employees in other restaurants in the area). Only one employee, a former host, has stated that she was unsatisfied with the compensation. We will be following up to see if she gets a percentage of the tips. → Health insurance is provided as per the law, which is not always the case in other restaurants in the area.	boomerangs) and 3 departed employees agreed to participate, out of a total of 12 possible candidates. Methods: ☑ Extant Data/ Documents List of rules posted in the restaurant Café manual (it's being reused as the manual in the restaurant) ☑ Observation Walk through the restaurant ☑ Interviews ☑ Individual Interviews will vary depending on the information sought. For discrete information, we will ask specific questions. However, for other data, we will start with open-ended questions to make sure we capture any
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	→ The work environment varies - servers are happy with it, but the chef stated that the kitchen lacks ventilation and is hot and smelly. Are employees adequately trained and skilled to perform their roles effectively? → The only training currently being provided to servers is for about 1-2 days by the most experienced server. Shadowing only. → The chef received no training or tour at all. → An employee stated in an interview that the transition from café to restaurant in December 2022 was very fast, without time dedicated to training. Other employees who had experience working in restaurants before provided some guidance and on-the-job training. → From our interviews, no additional courses or training is supplied to employees - however, in one instance an employee asked about taking classes about a skill relevant to the job and was able to get partial financial reimbursement. This is not provided equally to all employees. Are there workload or resource issues contributing to turnover? → We believe that the staff needs additional support to perform their duties based on: ◆ Between 3-4 servers take care of 20 tables with 80 guests at a time. ◆ However, servers must climb up and down stairs throughout their shift, carrying heavy loads because the kitchen is on the lower level, while the rooftop (the most popular part of the restaurant) is at the top level. ◆ The chef has stated that he doesn't have enough hours to finish his work, although he often stays late on busy days. ◆ The bartender has indicated that he would like an assistant. ◆ A server has stated that a runner (to carry food) would be helpful. ◆ Several employees have outright stated they would like more employees. What motivates employees to leave? Are there issues related to job satisfaction, workplace culture, or personal reasons? → Some employees mentioned lack of advancement, or not growing their personal and professional skill set.	information that we are not anticipating.
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	→ Two former employees outright stated that a former manager was a bully, a thief, and created a toxic work environment. She has since been fired. → One employee stated that they think some people just don't want to work hard. → Employees seem to be unaware of the possibility of salary raises. They must ask for them to receive them.	
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<i>Cause Analysis</i>		
Framework / Model	Key Questions and Analysis	Data Collection
Harless' Cause Analysis	What is the cause of the turnover? (Why do employees leave willingly?) → Some employees mentioned lack of advancement, or not growing their personal and professional skill set. → Two former employees outright stated that a former manager was a bully, a thief, and created a toxic work environment. She has since been fired. → One employee stated that they think some people just don't want to work hard. → Employees seem to be unaware of the possibility of salary raises. They must ask for them to receive them. → The kitchen has been described as lacking ventilation and is very smelly. ◆ This may contribute to the kitchen having the highest turnover rate in the restaurant. → There seems to be some variability in certain benefits people receive (flexibility of scheduling, raises, reimbursement for personal development). ◆ We wonder if these are special privileges and will investigate further. → Some employees feel like they work a lot and that they work very late. They don't seem to have a good work/life balance. → Sometimes people feel overwhelmed. ◆ Physical demands of having two floors ◆ Lack of formal onboarding and training ◆ Working a lot/poor work-life balance	Dates of Collection: 9/19-11/11 Sources: ☒ Client ☒ Executives/leaders Specify: Assistant manager and chef ☒ Target population Specify: Employees We were able to recruit 6 current employees (which include 2 boomerangs) and 3 departed employees agreed to participate, out of a total of 12 possible candidates.

	◆ Relaxed during downtime which leads to not being prepared during rush hour ◆ Poor communication between teams ◆ Kitchen telling a server it is not possible to make certain accommodations for customers ◆ Not enough hours in day to complete all work What evidence bears on each possibility? → Employee statements ◆ Strongest evidence is directly from those said they left due to poor management (the manager has since been fired). What is the most probable cause? → Poor management → The others are still possible! ◆ We need to collect more evidence. • Can confirm via surveys	Methods: ☑ Extant Data/ Documents - List of rules posted in the restaurant - Café manual (it's being reused as the manual in the restaurant) ☑ Observation - Walk through the restaurant ☑ Interviews ☑ Surveys ☑ Individual Interviews will vary depending on the information sought. - For discrete information, we will ask specific questions. However, for other data, we will start with open-ended questions to make sure we capture any information that we are not anticipating.
Chevalier's Updated Behavior Engineering Model	What motivates some employees to return to the restaurant after leaving? → One employee mentioned they left and came back after they realized other jobs did not have the same level of creative freedom. They felt they have freedom to create new drinks and they are not pressured in this aspect of the job. The follow up question about why they left originally was left unanswered. Are employees leaving because the salary compares unfavorably to other similar businesses in the area? → This doesn't seem to be the case. From early interviews, salaries are comparable with other businesses in the area, but they include tips and overtime. It was implied that not many other jobs in the area provide this. Additionally, the same can be said for insurance.	

Are employees provided adequate tools, materials and reference guides to perform their jobs adequately?

- Employees aren't always clear on the correct way to do things and how to handle situations.
- There are no job aids or handbooks with additional information.
- They must go to the owner to ask questions.
- From a walk around the restaurant, we discovered a list of rules that are posted on the wall of the restaurant.
- From one of our early interviews, we found out that a copy of the café manual is being used in the restaurant. According to our source, it describes customer service procedures. We will investigate this further.
- The current chef has stated that the kitchen is not well-equipped.
- It doesn't have an extractor or good ventilation, so it's very hot.
- Some tools are missing.
- The walls need new paint.
- The floors are porous and trap smells.
- Employees are able to request additional tools if they can explain why they need them and how it will benefit their job/the restaurant.
- Some additional tools may be needed in the bar: an extra freezer, a longer bar, more strainers.

Are employees leaving because they don't have the adequate experience and knowledge to perform their jobs?

- Nobody has indicated a lack of competency nor have they indicated lack of competency as being a reason for leaving or considering leaving.

Does the restaurant support employees' professional development and goals?

- No indication has been made that management makes this a priority.
 - ◆ However, when employees ask for support, they are given support (e.g. 50% compensation of English lessons for one employee).
- One employee stated they believe people leave because they do not feel like they are progressing professionally and personally.

	◆ This employee left and came back. They may have left for this reason (our follow up question was not answered). Are employees aware how they are doing in relation to the goals and metrics for their positions? → All interviews until now indicate that the answer is no because they do not see such metrics. Do employees receive recognition and feedback? → Yes, employees receive regular informal feedback. Nothing is documented, however. They receive praise for good performance. Do employees feel comfortable discussing problems with supervisors? Does management create a healthy work environment? → Currently, yes. However, there were issues with one former supervisor. She caused two people to leave the restaurant. What are employees motivated by? Are those things being offered to employees as incentives to stay with the company? → According to the owner, most employees are motivated by money (salary, tips and bonuses). The secondary items they are motivated by are health insurance, a free meal every shift and 50% off food/drinks. ◆ Insurance is a requirement in Mexico, but not all employers comply. → Employees can double or triple their pay with tips on busy days. → From early interviews, employees have indicated that they are motivated by: ◆ returning customers (pride in their work) ◆ helping the business grow ◆ freedom/creativity in their role ◆ passion for their work ◆ salary to support their dependents ◆ learning new things on the job (not through formal training) ◆ continuing professional development (not offered equally to all employees)	
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	Are employees compensated according to performance and time worked with the restaurant? → From our interviews, employees have said that they are not given raises according to time worked in the business, sometimes they are given raises or adjustments if they ask the owner. What training is being provided to employees when first joining? → Servers do 1-2 days of job shadowing of the best employee in their position. → One position indicated they didn't receive any training or even a tour of the restaurant. ◆ This particular employee said they do not socialize much with everyone else. ● They indicated communication problems between the team.	
Additional Questions	What have employees (current and former) recommended that could be done better in the restaurant to improve employee satisfaction and the business as a whole? → A few employees have stated that the restaurant needs to be more organized. ◆ One said the teams (departments) did not communicate well with each other. ● They offered the suggestion that they could have regular meetings to discuss their work to make everything clear. → Sometimes employees stand around during downtime aimlessly. They end up not being prepared for the rush hour. ◆ One employee suggested having a lead server who can tell people what to do during this time. → One employee suggested writing expectations and standards down so people are more conscious of them. → Formalized training → Maintain the terrace as it is the pride of the restaurant → Have more events such as live music	

	Do employees have a good work-life balance? Does work affect their personal lives? → From our early interviews, there have been mixed responses regarding work-life balance: ◆ Employees who have the evening shift (4pm - 12am) often stay until 1 or 2am during busy periods. ◆ One employee indicated that there is flexibility about the beginning time of the shift, which allows for fulfilling of family responsibilities. ◆ Another employee said they were allowed to come in late or change a shift if they had other commitments. ◆ Another employee stated that they feel like they work all the time, often staying late.	
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Notes

- We still need to collect more information to confirm the problem (comparing the restaurant's turnover to other restaurants in the area).
- We will look into why servers tend to only stay for an average of three months.
- We wondered why March had one of the highest turnover rates and determined it was because of a former manager who created a toxic work environment.
 - ◆ We still need to find out why June had one of the highest turnover rates.
- Does age and having dependents have a relationship between whether an employee stays or leaves?
 - ◆ We have collected some data on this, but we need another interview with the owner to reconstruct some information about employees who left but we weren't able to interview.

Intervention Analysis / Feasibility Analysis

Framework / Model	Key Questions and Analysis	Data Collection
To be determined once all data is collected and analyzed Possible: → SWOT Analysis → Force-Field Analysis	How can we reduce the turnover rate? → Identify most impactful causes → Research and review relevant literature that address the causes ◆ How have other organizations handled similar issues? Identify possible interventions → Prioritize them by importance and potential for success. Evaluate the feasibility of the possible interventions → Consider political, social, infrastructural, environmental and competition factors and their influence on the possible interventions → Does the client have the resources to implement the interventions?	Dates of Collection: 9/19-11/11 Sources: ☒ Client ☒ Executives/leaders Specify: Assistant manager and chef ☒ Target population Specify: Employees We were able to recruit 6 current employees (which include 2 boomerangs) and 3 departed employees agreed to participate, out of a total of 12 possible candidates. Methods: ☒ Extant Data/Documents List of rules posted in the restaurant Café manual (it's being reused as the

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Limitations to Data Collection and Analysis

#	Limitation	Implications
1.	The interviewers are conducting the interviews in Spanish, which is not their first language.	It is possible that we will miss nuances in the responses or don't generate the best follow-up questions. Without mastery of Spanish, the conversations cannot reach the same depth as they would in English. The use of captions during virtual interviews helps a great deal.
2.	We are unable to conduct interviews from October 29th to November 7th due to the Day of the Dead holiday in Mexico.	This limits the amount of time we have to interview and will therefore limit the number of people that we interview. This limit on data collection hurts our chances of gaining the most complete analysis possible.
3.	One of the team members has a personal relationship with the owner of the restaurant.	Interviewees may be hesitant to share certain information due to this relationship.
4.	The restaurant has limited documentation and data available to use.	This limits the data we can analyze because reconstructing data through interviews or collecting sales data is a time-intensive process.
5.	Two former employees will not be contacted based on the owner's request since the employee left on bad terms and the other has a personal relationship with him.	We might miss out on collecting valuable information by not gaining the perspective of an employee who left on bad terms (although there is the possibility that their experience is an outlier and inconsequential to data analysis).
6.	Some telephone interviews have suffered from poor reception. One interviewee instead sent voice notes but this made it very difficult to ask follow up questions because they would send responses up to 3 ½ minutes long so the interview took an hour longer than anticipated. Questions had to be cut down to save time.	The interviewer was not able to ask all follow up questions so couldn't get the best data possible. Some answers were cut off by poor reception. The interviewer did send follow up questions via chat but they were not answered.



THANK YOU!

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