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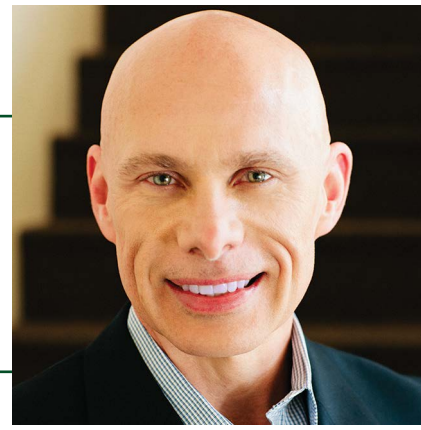Tel: 865-637-7673 • E-mail: **advertising@cupahr.org**

Is HR Too Busy to Lead Diversity Work on Campus?

By Andy Brantley, CUPA-HR President and Chief Executive Officer

Last spring, CUPA-HR launched its Creating Inclusive Communities (CIC) project. Using portraits and videos from 24 higher education HR professionals, the project is a celebration of experiences and perspectives, a resource for initiating conversation about diversity and inclusion and a call to action to create more inclusive campus communities. We launched CIC with much fanfare during our 2016 association leadership program, at last spring's region conferences and at our annual conference last fall. Our region and chapter leaders shared the project at fall and spring chapter meetings, and we have shared the resource through our regular communications with our 23,000 members and through our website. I have also shared the CIC with my counterparts at approximately 40 other higher education associations.

The project is by far one of the best diversity and inclusion resources available for campuses to use to help enhance the cultural competence of faculty, staff and students. It is free, and the plug-and-play facilitator guides make the resource easy for any facilitator to use.

Great! Ready, set, go! Only it didn't "go."

A full year after the launch of the project and website, usage is abysmal. The web page averages approximately 20 visits per day, making it one of the least-visited sections of our website. In March, we sent a survey to our 23,000 members asking for feedback regarding the project and website, examples of how institutions are using the resource and the impact that CIC is having on campus. Of the 250 responses received, 60 percent indicated they were not even aware of the project. I must admit that I was quite surprised. The good news from the survey was that those using the resource loved it.

I look back over the past 12 months since the launch of CIC and get that we've all been swamped. I understand that the hoopla surrounding the proposed changes to the Fair Labor Standards Act totally consumed many of us. I also understand the tremendous compliance burden and funding challenges facing higher ed HR leaders across the country. But I have to wonder if it's time for us to not just put diversity and inclusion somewhere on the to-do list, but instead weave a commitment to diversity and inclusion into everything we do. If it is only on the to-do list, it frequently falls off as other pressing issues of the day take priority.

It would be very easy to start a staff meeting with one of the CIC videos and facilitate brief dialogue. It would also be very easy to share this resource with campus chief diversity officers and student life professionals and encourage them to use the videos and discussion starters as part of their ongoing work — not as a separate or new project, but as a part of our shared ongoing commitment to creating and sustaining a diverse, inclusive campus community.

I've been in higher ed for many years, and I have great respect and admiration for those who move talk (we all talk a good game regarding our commitment to diversity and inclusion) to action. Sometimes bold action is required, but more often than not, the real action occurs through the small things we commit to do every single day as part of our work and our responsibility to lead.

I encourage you to visit **diversity.cupahr.org** and use these incredible resources as part of your everyday work. I also invite you to click the share button on the site to let us know how you are using the CIC project and the impact that it is having on campus.

Andy Brantley | CUPA-HR President and CEO

Many Americans Are Stressed About Retirement, Aren't Taking Steps to Prepare

Many American workers today are feeling stressed about retirement and are not taking steps to prepare for it. And those feeling stressed have lower levels of retirement confidence and are less likely to feel financially secure, according to the 2017 Retirement Confidence Survey (RCS) by the nonpartisan Employee Benefit Research Institute (EBRI) and Greenwald & Associates.

This year's RCS finds that three in 10 workers report that they feel mentally or emotionally stressed about preparing for retirement. Another 30 percent say that they worry about their personal finances while at work, and half of these workers believe they would be more productive at work if they didn't spend time worrying. Among all workers, about half say that retirement planning, financial planning or healthcare planning programs would be helpful in increasing their productivity. Yet, many workers are not taking critical retirement-planning steps.

Six in 10 workers say they have saved for retirement, but just four in 10 have tried to figure out how much money they will need in retirement. Similarly low shares have estimated how much income they would need each month in retirement (38 percent) estimated the amount of their Social Security benefit (38 percent), or estimated their expenses in retirement (34 percent). "I continue to be struck by the relatively small share of workers who do formal retirement planning," says Lisa Greenwald, assistant vice president of Greenwald & Associates and co-author of the report.

Use of a financial advisor increases with age and income, but just 23 percent of workers say that they have spoken with a professional advisor about retirement planning, and only 1 in 10 report they have prepared a formal plan for retirement. As earlier waves of the RCS has found, far more retirees report confidence in affording a comfortable retirement than do workers. Almost 80 percent of retirees report feeling either very or somewhat confident about

having enough money to live comfortably throughout their retirement years, including one-third of retirees who feel very confident. But among workers, 18 percent feel very confident. The share of workers reporting that they feel either very or somewhat confident is lower than last year (down to 60 percent this year from 64 percent in 2016). However, worker confidence is very close to the levels measured in 2015 (when 59 percent were either very or somewhat confident).

"Many workers are worried about retirement issues and their personal finances more broadly," says Craig Copeland, EBRI senior research associate and co-author of the report. "The key factors are debt, lack of a retirement plan and low savings." Copeland notes that workers who feel their debt is a major problem have notably lower retirement confidence (32 percent are very/somewhat confident vs. 78 percent among those who say debt is not a problem), while those who have a retirement plan have markedly higher confidence (71 percent very/somewhat confident vs. 33 percent among those who do not have a retirement plan).

Among the major findings in this year's RCS:

- Importance of a retirement plan: Workers who have a retirement plan, whether a defined contribution plan, defined benefit plan or IRA, have saved more than those without a plan, have taken more steps to prepare for retirement and feel less stressed about retirement preparations.

- Saving incentives: Seventy-three percent of workers not currently saving for retirement say they would be at least somewhat likely to save for retirement if contributions are matched by their employer. Approximately two-thirds of non-saving workers say they would be likely to save for retirement if automatic paycheck deductions with the option of changing or stopping them, at either 3 percent or 6 percent of salary, were used by their employer.

- Financial wellness: Stress about retirement preparations and worry over personal finances at work are causing some workers to be less productive. Among all workers, a majority feels retirement, financial and healthcare planning programs would be helpful in increasing productivity.

- Healthcare in retirement: Workers are far less confident than retirees about being able to afford healthcare in retirement. Roughly half of workers (54 percent) say they're very or somewhat confident about being able to afford medical expenses in retirement (vs. 77 percent of retirees). Workers are also less

confident than retirees that Medicare will continue to provide the same level of benefits that retirees receive today (38 percent of workers vs. 52 percent of retirees).

The full report, "The 2017 Retirement Confidence Survey: Many Workers Lack Retirement Confidence and Feel Stressed About Retirement Preparations," is published in the March 21, 2017, *EBRI Issue Brief*, available online at www.ebri.org.

Trump Administration Backs Termination of ACICS

The Trump administration has backed its predecessor's decision to terminate the recognition of the Accrediting Council for Independent Colleges and Schools (ACICS), a national accreditor that oversees 245 colleges, most of them for-profits.

The Education Department finalized its decision to nix the accreditor shortly before Trump's inauguration, citing concerns about lax oversight of the collapsed Corinthian Colleges, ITT Technical Institute and other colleges. ACICS sued to block the department's move.

In late April, the department filed a legal brief supporting the Obama administration's move. Among other arguments, the department said ACICS had failed to swiftly and properly adopt sufficient standards. "For example, despite having applied for renewal of recognition in January 2016, the secretary noted that, as of December 2016, ACICS still lacked a standard with respect to student achievement in obtaining licensure," the filing said.

Some observers have wondered whether the Trump administration might change course on ACICS, given its stated interest in rolling back federal regulations. But the ACICS decision, which several state attorneys general have backed in court, would be a difficult one to reverse, experts said.

Most of the 245 institutions overseen by ACICS have begun attempting to find a new accreditor, with the Accrediting Commission of Career Schools and Colleges saying in January that it expected to receive 210 applications from ACICS institutions by the end of that month.

This brief was authored by Paul Fain and originally appeared in Inside Higher Ed on May 2, 2017. It was reprinted here with permission.

State of Paid Parental Leave: Who Offers It and How Much Time Do They Give?

Much has been written about how generous paid parental leave will soon become a standard benefit at most organizations. But how many firms are really offering it and how generous is the perk?

That's the question WorldatWork attempted to answer in a comprehensive and first of-its-kind study titled *Survey of Paid Parental Leave in the United States.*

We say first-of-its-kind because the study narrowly defines paid parental leave as a separate entity from other paid leave programs and purposely omits other leave programs such as short-term disability, paid sick time, government-funded disability or insurance payments as well as any programs that supplement partial pay.

Commenting on the need for such a specific study, WorldatWork senior practice leader Lenny Sanicola says: "Paid parental leave is an emerging benefit. There are numerous splashy headlines in the news about paid leave, but these headlines can be misleading. This survey uses a strict definition so that we can really dig into what is being offered as true paid parental leave that goes above and beyond existing paid leave programs."

So what exactly did WorldatWork discover?

Overall, more than a third (38 percent) of employers offer a defined paid parental leave benefit for new-parent employees to recover from the birth of a child and/or to care for or bond with a new child. For those employers, that leave is separate from all other paid leave, and employees don't need to use or exhaust other paid time off or earnings to take advantage of the benefit.

When it comes to the amount of paid parental leave offered by employers, the average eligible full-time new parent gets 4.1 weeks. Of the 38 percent of employers that currently offer paid parental leave benefits, the study also found:

- 80 percent offer employees their full/normal pay during the leave;

- 78 percent offer paid parental leave to all employees (22 percent offer it to only some workers);

- 58 percent give the same amount of paid parental leave to all new-parent employees; and

- 85 percent don't distinguish the amount of paid parental leave between primary or secondary caregivers.

Many of these organizations were also subject to laws that mandate paid leave but tend to go above what's required by law. Specifically:

- 64 percent are subject to at least one state/local paid parental leave requirement, and

- 88 percent offer more or expanded paid parental leave than what's required by law (longer duration, larger percentage of normal pay rate, broader set of new-parent circumstances, etc.).

This brief was authored by Jared Bilski and originally appeared on HRMorning.com on May 2, 2017. It was reprinted here with permission.

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inclusion cultivates excellence

Principles of Inclusivity
How One University's Focus on Inclusivity Is Shaping Campus Culture

By Annette Denny and Katrina Di Gravio

In 2009, the University of Waterloo in Ontario, Canada, launched a new strategic plan, which included a key theme focusing on global prominence and internationalization. Realizing that the institution's new focus would present the campus community with new and different cultural experiences, behaviors and expectations, university leadership charged a committee of staff, faculty and students with creating a framework to promote a culture of inclusivity and inclusive practices and to help the campus community develop mindful everyday actions and behaviors. Today, the Principles of Inclusivity serve as a guiding force for the University of Waterloo community for how to model understanding, inclusion and respect.

A Road Map for Inclusivity

University of Waterloo's Principles of Inclusivity are the ideals by which campus members can model respect for one another, regardless of their ethnicity, religion, gender, social class, sexual orientation, ability, and all the other characteristics that make us different from one another, yet make us who we are.

Waterloo's six Principles of Inclusivity are:

1. Acknowledge that individuals have unique and particular needs in the learning and work environment.

2. Respect each individual's right to express and present themselves relative to their religion, culture, ethnic background, sexual orientation, gender identity, and physical and mental ability.

3. Promote inclusivity by reasonably adjusting procedures, activities and physical environments.

4. Focus on the capability of the individual without assumptions or labels.

5. Be inclusive in all forms of communication.

6. Serve all with sensitivity, respect and fairness.

Over several years, these principles have been built into new and existing university policies and practices. The principles are introduced to all new staff and faculty during orientation; faculty members are building them into their lectures and academic material; managers are creating inclusive performance standards and goals based on the knowledge, skills and abilities from the Principles of Inclusivity certificate program; and inclusive practices are a required discussion item in employees' annual performance appraisals. Additionally, students promote the principles during first-year orientation and resident director training programs.

Posters of the Principles of Inclusivity are supplied in both small and large sizes so that every employee has the option of posting the principles in their own work space as well as in their department. Having that visual reminder to apply the principles in our everyday practice allows for continuous reinforcement, which positively impacts the culture of the university.

A Learning Opportunity

Soon after the Principles of Inclusivity were adopted, the university's organizational and human development (OHD) department began looking at ways to help the university community put these principles into practice. Out of those efforts was born the Principles of Inclusivity certificate program.

The certificate program consists of seven highly interactive, homegrown, half-day development workshops designed to support and encourage participants along a personal journey of self-awareness and discovery by challenging them to question their assumptions, enhance mindful awareness, and develop an action plan to reinforce and champion inclusivity. The introductory module is a prerequisite for the other workshops within the series, and the capstone workshop must be the final workshop completed; otherwise, participants can attend the workshops in any order at any time that compliments

their work schedule. Workshops are offered multiple times throughout the year and cover topics like inclusive communication, generational inclusivity, sexual orientation and gender identity, accessibility and more. To date, nearly 1,800 participants (nearly 40 percent of the University of Waterloo workforce) have completed one or more workshops; more than 160 employees have completed the program and earned their certificate (which equates to 4,400 hours of inclusivity training); and 91 percent of participants have stated that they gained a new or different perspective after taking the workshops. Completion of the Principles of Inclusivity certificate program is recognized as a preferred hiring criterion for internal hires and promotions.

Setting the Stage for Success

Whether your organization is embarking upon a new inclusivity initiative or program or already has one in place, here are some tips to set the stage for success:

- Create a committee or working group to champion inclusivity — don't try to do it alone.

- Start small — identify one or two front-burner inclusivity issues for your organization and focus there.

- Consider what is ahead for inclusivity from a legislative and organizational point of view, and let this guide programming and focus.

- Make it an expectation in your organizational culture that all employees participate in the program (discuss the idea of making it mandatory).

- Use your own in-house subject-matter experts to deliver programming.

- Customize the program to meet the needs of your organization.

- Link the goals and objectives to your institution's vision and mission.

- Build inclusivity into performance plans and goals.

A Campus-Wide Transformation

University of Waterloo's focus on inclusivity has led to a significant shift in campus culture — inclusivity has become an important discussion and integral part of the university community. HR has developed tools and language within hiring practices and performance reviews that include inclusive actions and behaviors as benchmark standards; managers are working more closely with their HR partners to ensure they are considering inclusivity in their language and communications; and there has been a significant uptick in directors and senior managers requesting inclusivity training for their departments.

Employees have shared that they have an increased awareness of inclusive practices within their work teams and that they more often consider and take action based on the needs of others. We've also seen increased awareness and usage of programs and resources on campus that support inclusivity, such as the AccessAbility Office, the United Nation's HeForShe Campaign, the Employee and Family Assistance Program, the equity office, gender neutral restrooms, the conflict management and human rights office, the GLOW Centre for Sexual and Gender Diversity, the "Making Spaces" program (safe spaces for LGBTQ+) and student leadership workshops exploring inclusivity.

A Catalyst for Culture Change

University of Waterloo's Principles of Inclusivity certificate program acts as a catalyst to shape an organizational culture that celebrates differences and values diversity by creating an opening and welcoming environment for all. The university's focus on inclusivity has facilitated a culture of organizational and personal growth — increasing creativity and performance, raising awareness of non-typical problem-solving, building institutional mindfulness, helping to remove barriers, bridging policies with everyday actions, and creating opportunities for institutional partnerships and collaboration. At University of Waterloo, inclusivity is an expectation for every member of the campus community, and our work, our people and our institution are better because that foundation has been laid.

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A New President
A Look at His Policies and His Cabinet

By Josh Ulman, Christi Layman and Basil Thomson

When a new administration takes office, we expect some changes in policy and personnel. In cases like this year, where the new president and former president are of different parties, the changes can be significant. While the granular details about Trump's policy changes remain unclear, we do have a general picture on how the new administration may tackle some of the issues important to HR practitioners.

The Trump Transformation and Workplace Regulation at 30,000 Feet

Like his predecessor, President Trump has promised to be a transformational president that shifts the paradigms that shape our political parties. Specifically, Trump has said he will remake the Republican party into "the party of the American worker" by creating jobs for middle-class Americans and rebuilding America's inner cities. He reportedly plans to achieve these goals by:

- Reducing taxes on American businesses and the middle class;
- Cutting regulations;
- Imposing restrictions on trade and immigration;
- Making large investments in infrastructure and defense; and
- Supporting law enforcement.

Trump has already issued several executive orders on immigration and regulations, and we expect more.

So, what does this mean for HR practitioners trying to "look around the corner" and see what's next in the world of labor, employment and immigration policy? The obvious takeaway is that there will be more restrictions on immigration, with likely reforms to H-1B visa programs and expansions to mandatory E-Verify. In fact, we're already seeing action on H-1B visas, as the United States Citizenship and Immigration Services has temporarily suspended premium processing of H-1Bs.

What's less obvious is how the new administration will handle other regulations impacting the workplace. While the president has promised to decrease regulations generally, his view on regulating the workplace appears to be more nuanced. For starters, he does not appear to be a free market purist and seems quite comfortable with government intervention in markets — particularly labor markets. We see this with his focus on limiting immigration, a protectionist view on trade, and his support for Keynesian-style economic stimulus via infrastructure and defense spending. All are intended to tighten domestic labor markets and drive up wages.

In addition, the president's comments suggest he is not universally opposed to regulation, particularly with respect to the workplace. As part of his executive action on regulation, the Trump particularly focused on workers, stating that "the administration will be asking a simple question when it comes to every regulation: will it help working men and women in this country? If the answer is no, we are not going to put it in place." This seems to indicate that the administration may regard and treat regulations that directly affect the workplace differently than other regulations that could interfere with job and wage growth.

Another indication that the Trump administration may treat workplace regulation differently is the president's substantial and immediate outreach to unions, which consistently advocate for greater regulation of the workplace. Upon taking office, the president immediately engaged trade union leaders, even though these union leaders disparaged him during the campaign, and he has continued this dialogue — most recently meeting with AFL-CIO President Richard Trumka to discuss trade, infrastructure and stagnant wages.

Given President Trump's stances on trade, immigration and infrastructure spending, he may see union endorsements as an important part of his possible path to re-election in 2020. While the president did better than any Republican

since Ronald Reagan with union households, he may see an opportunity to make further inroads into the traditionally Democratic territory by obtaining union endorsement. This could reshape the Republican party and how it views labor policy and labor markets.

Any pivot by President Trump toward increased regulation of the workplace, however, will need to be balanced with maintaining relationships with important businesses and pro-business Republicans on the Hill — whose support the president will need to advance his agenda. The bottom line is that the Trump administration may spend more effort on threading the needle on labor and employment policy than we saw in the Bush or Obama administration.

Whether this means the administration only makes moderate changes in policy or deregulates aggressively in some areas and less in others remains to be seen. However, we should not expect the Trump team to necessarily pursue the same labor and employment policy positions that Republicans have supported in recent decades.

Slow Staffing = Slow Policy

To what extent we're able to begin to understand the specific and intricate policies that President Trump will undertake to fulfill his campaign promises to the American worker relies heavily on the extent to which he is able to get his administration in place. To date, Trump has had 25 of his 63 nominations confirmed, including all 15 secretary-level positions.

While every president faces delays with at least one nominee, the confirmation hearings for Trump's nominees have begun later and have lasted longer than those of the previous five presidents' nominees. These delays have been due to Democrats slowing the process and tardy paperwork from the nominees themselves. It is also a sign of how partisan politics have become on Capitol Hill.

If you compare the number of votes President Trump's nominees have received to the number of votes the past five presidents' nominees received, this partisanship is much starker — Trump's nominees have received an average of 69 "yes" votes per nominee, which is significantly less than the average of 95 "yes" votes the prior five presidents' nominees have mustered.

The nomination and confirmation process for the labor secretary proved particularly disruptive and contentious. President Trump's first nominee for secretary of labor was Andy Puzder, CEO of CKE Restaurants, who withdrew February 15 as it became clear he did not have the votes in the Senate to be confirmed. His confirmation proved impossible for several reasons and began early on as his complex finances triggered delays in delivery of his financial disclosure report to the Office of Government Ethics, which in turn triggered delays in the confirmation hearing. The delays allowed his opponents in organized labor and elsewhere to mount a substantial and comprehensive opposition campaign.

Prior to becoming the labor nominee, Puzder was an outspoken free market advocate. Writing opinion pieces for *The Wall Street Journal* and presenting Congressional testimony on issues such as the Affordable Care Act,

While the president has promised to decrease regulations generally, his view on regulating the workplace appears to be more nuanced.

unions, overtime, immigration and the minimum wage meant, not surprisingly, that many unions and others opposed his nomination. After his nomination was announced, additional stories came out regarding several controversial comments he had made about low-wage workers and their skills and the advantages of automation replacing low-skilled workers. Additionally, his ex-wife accused him of domestic abuse 30 years prior, and while she had recanted, the severity of the claim left many concerned. The final straw, however, was information released late in the process about his off-the-books employment of an undocumented immigrant as a housekeeper.

President Trump named a new nominee — Alexander Acosta — within 24 hours of Puzder's withdrawal. Acosta was confirmed on April 27. Acosta has served as dean of Florida International University's College of Law, as a U.S. attorney, as head of the Department of Justice's civil rights division and, for a short time, as a member of the National

Labor Relations Board (NLRB). Acosta is quite different from Puzder — while both Puzder and Acosta are lawyers, Puzder has been primarily a CEO and business person, while Acosta has spent his career as a public servant and in academia.

Puzder is a vocal supporter of free markets, including free labor markets, so he seems naturally inclined to oppose heavy regulation of the workplace. Acosta, on the other hand, is primarily known as a jurist, and his time at the NLRB was marked by bipartisanship. In fact, during the nine months he served on the NLRB, Acosta sided with Democratic members of the Board just as many times as he sided with his fellow Republican colleagues when there were disagreements along partisan lines.

In contrast to Puzder, unions came out in droves to support Acosta's nomination, including a glowing statement from Wilma Liebman, a former Democratic NLRB member who served with Acosta on the Board. Acosta also received support from businesses and conservatives.

Confirmation delays at the cabinet level are not the only obstacle to Trump delivering on his promises. In fact, there are 556 key executive branch positions that require Senate confirmation. According to the Partnership for Public Service, 468 of these positions, which include deputy and assistant secretaries, chief financial officers, general counsel, heads of agencies, ambassadors and other critical leadership positions, are still awaiting nomination.

At cabinet-level agencies, these positions are critical in helping the secretaries carry out their mission by making sure the agencies move forward on goals and provide necessary direction to staff. At smaller and independent agencies, such as the NLRB or Equal Employment Opportunity Commission, where commissioners or board members serve staggered terms, the president must fill vacancies as they arise to ensure the agencies are implementing his agenda.

The bottom line is that in many cases, key regulatory and policy decisions will need to wait until nominees are named and confirmed, which may take some time.

What Happens in the Meantime?

It appears the status quo will be in place for now as we wait for sub-secretaries and agency heads to be nominated. In March, the Department of Labor (DOL) was granted an additional two-month extension to decide what it will do in the litigation challenging the Fair Labor Standards Act overtime rule. DOL is also defending in court several other challenges to rules. Now that Acosta has been confirmed as labor secretary, it is likely the department will move forward with policy based on a deliberative process that results in the type of moderate policy positions that have marked his career to date, with a focus on tightening labor markets and a reduction in regulatory burdens. It is also expected that an Acosta DOL will be more focused on compliance assistance than the Obama-era DOL, which focused on litigation and enforcement.

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Want to learn more about the changes to the H-1B visa program? On May 11, CUPA-HR hosted a webinar during which we reviewed the executive order, went over changes to the H-1B program that have already taken effect, and looked at changes that may occur down the road. View the recorded webinar at www.cupahr.org/events/webinars.aspx.

Want to demonstrate talent management's strategic value on campus?

Our survey says: Make your case with data

Develop a strategic talent management presence using guidance, insights and predictions from 400 higher education professionals, including:

- Talent management teams that track performance are twice as likely to secure the resources they need to succeed.

- Eighty percent of institutions are inadequately staffed to support strategic recruiting initiatives.

- From 2014-2015, faculty job postings increased 5.8 percent, but applicant volume decreased.

HR as a Key Player in Organizational Change

How HR Is Helping Drive Excellence at Florida International University

By Trudy Fernandez

Florida International University (FIU) has been laser focused on implementing an aggressive strategic plan called FIU*BeyondPossible*2020, with the goals of ensuring student success, building preeminent programs, achieving the Carnegie Very High Research designation and increasing the institution's financial base and efficiency.

During this time of rapid growth and organizational change, FIU's division of human resources has been at the helm of several initiatives driving the "people side" of numerous transformations to position FIU to succeed in meeting its goals.

Leading Change

HR is providing several strategies, tools and programs that are helping FIU strengthen its infrastructure and engage its highly diverse faculty and staff in meaningful ways. These HR-led initiatives include a focus on service excellence, the Leadership Education Advancement Program, the Performance Excellence Process, university relations initiatives, and a classification and compensation redesign.

Service Excellence

One of the strategies for meeting the goals of the university's FIU*BeyondPossible*2020 plan was to develop a consistent "brand" of service excellence across the campus, and human resources was charged with leading this effort. FIU leadership established a service excellence task force in 2014. The task force, made up of 70 staff, faculty, students, administrators and leaders representing their respective business units or special interest groups, were charged with addressing five key goals: understanding the customer, developing service standards, telling our service story, developing training and rewards, and fostering innovation and solutions.

Over a six-month period, the task force used focus groups, survey data, interviews and benchmarking to understand

what students and other customers most valued in their interactions with FIU. Monthly meetings were held to track progress, assign next steps and encourage dialogue and collaboration. The five work streams emanating from the goals accomplished the following:

- Voice of the Customer – analyzed data, reported results, identified and prioritized trends to be addressed

- Core FIU Standards – focused on determining methodology, collected all existing standards, drafted new standards and made final recommendations

- Communication – developed communication plan/timeline, developed key messages, identified audiences, drafted new brand, developed marketing strategy and ongoing reinforcement communication

- Training and Rewards – developed service excellence training strategy and e-learning for existing and new hires, identified alignment opportunities such as with the annual performance review instrument to redefine service excellence competency and ratings, identified and made recommendations to enhance rewards and recognition strategy

- Solutions – served as the core leadership triage with quick-response team to find solutions to complex problems

A dedicated SharePoint site was established to provide a central and accessible process for all documents and data. Project management plans tracked assignments, status and interdependencies and provided high visibility and accountability.

Service excellence was incorporated into the FIU strategic plan and communicated by the president and provost in town hall meetings as a focus priority. In just three months, more than 900 employees were trained around

service excellence. To expand the reach of the program, 46 faculty and staff participated in train-the-trainer workshops, equipping them to facilitate the service excellence workshops.

Subsequently, more than 2,000 additional employees have been trained, and workshops are offered monthly for new hires. Facilitators receive a workbook, a leader's guide, a PowerPoint with video vignettes, and an FIU service excellence standards handout. Program graduates are awarded a certificate of completion and three hours of professional development credit. For employees who work non-traditional schedules or who are based remotely, service excellence e-learning programs are offered.

Leadership Education Advancement Program

The Leadership Education Advancement Program (LEAP) is an eight-week program designed to provide leaders with critical knowledge and skills needed to manage with excellence. The program is structured into four categories — institutional knowledge, managing self and managing others, workforce management and operational excellence — and concludes with a capstone project in which participants develop and present proposals for a solution or project that resolves an existing challenge or offers an innovative idea for FIU. A panel of university senior leaders and executives reviews the proposals and makes recommendations for further development and/or implementation.

Since LEAP began in 2011, 550 of FIU's leaders have graduated from the program. LEAP graduates represent almost every business unit at FIU. Combined, they manage more than 1,650 direct reports (19 percent of FIU's total workforce). To date, the launch of LEAP has generated the successful implementation of 10 projects on topics ranging from improving FIU parking to implementation of an HRIS ticketing system. Out of 550 graduates, 81 percent are still employed at FIU. A similar population over the same period at FIU would have yielded a retention rate of 65-70 percent. And while participation in LEAP does not guarantee a promotion or a raise, 106 (20 percent) LEAP graduates were promoted after their participation in the program.

Performance Excellence

Alignment of individual performance goals and work with strategic priorities is a critical component of culture change. The Performance Excellence Process (PEP) at

FIU has evolved from a paper-based process to a fully online system that links the performance of individuals to the goals and values of the university. HR facilitated the transformation from managers focusing mostly on how to complete the PEP document to them learning to have meaningful conversations with employees about performance and, most importantly, how to establish goals and set expectations for the performance period. PEP is a key dependency for the transformation to a pay-for-performance compensation philosophy, as PEP ratings are used as a basis for merit increases, bonuses and promotional opportunities.

To roll out the new performance evaluation process, HR hosted one-hour webinars during which we shared the new features and outlined the process (821 individuals attended). PEP completions have increased from a 60-65 percent completion rate in 2012 to a 90+ percent completion rate today.

University Relations Initiatives

At FIU, taking the time to praise and recognize our workforce is at the heart of what we do. To that end, the following are just a few ways HR has been able to galvanize the university community by strengthening and building a culture of recognition and appreciation:

- Recognition – The annual FIU Service and Recognition Program has been enhanced to align with our strategic goals. As an example, two new award categories have been added in recent years to reflect our commitment to service excellence and safety and loss prevention. In addition to this recognition program, we host a week-long series of events to recognize our student employees, culminating with the Student Employee of the Year awards ceremony.

- Compassion – The Tender Loving Care Brigade, established by FIU's president, provides immediate support to faculty and staff experiencing unexpected hardships. Assistance provided varies and can range from access to FIU's internal food bank to financial assistance, referral to our internal units for ongoing support (such as medical, legal or emotional support), or simply an expression of condolences or well wishes.

- Appreciation – The university hosts several appreciation events throughout the year for faculty and staff, including a family picnic in the spring,

homecoming activities, diversity week activities and the president's holiday celebration. These events provide an opportunity for faculty and staff across the university to come together in celebration of our accomplishments. Take Our Daughters and Sons to Work Day also provides the FIU workforce with an opportunity to expose their children to higher education while engaging them in organized activities that highlight our Worlds Ahead research programs and services. Recognizing the value and desire of our retirees to help advance our university's mission, we have established the FIU Retiree Association to find meaningful ways to engage them with our university community. In addition to retirement announcements and formal recognition at social events to thank them for their contributions, we introduced the inaugural FIU Ambassador Award in the fall of 2016. This award is presented during the annual FIU retiree reunion to a retiree for his or her commitment of time and service to others on a volunteer basis.

Classification and Compensation Redesign

By overhauling FIU's classification and compensation structure, HR is able to better provide FIU leadership with relevant data to formulate plans by which to attract and retain the talent needed in order for the university to accomplish its goals. In taking the bold step of evaluating every position to determine accuracy in content, appropriate titling based on the nature of the work and alignment with the general market of relevant peers, the classification and compensation redesign project team collaborated with more than 300 subject matter experts and participants throughout the university, including HR graduate students. Every college, department and organizational unit participated in the development of the improved job classification structure and new "career ladders." The new classification structure is now in alignment with FIU's strategic plan.

Examples of new capabilities include:

- The ability to compare similar jobs within the organization more easily, providing internal equity.

- The ability to quickly and efficiently compare the university's jobs to the labor market, providing realistic external competitive pricing.

- Tools to support career development (employees and managers can now explore FIU's online job specifications and envision career paths at FIU).

Similar to the work streams created for the service excellence initiative, position description review teams were created for each unit across the university. Approximately 2,800 positions were reviewed; four career groups were created; 22 job families and 134 sub-families were established; 847 job titles were developed and/or updated; and 300 administrators/faculty/staff/students participated.

An Employer of Choice

As a result of FIU's organizational transformation, the university is now recognized as an employer of choice. FIU earned national recognition from *Forbes* in 2015 and again in 2016 when the university was ranked second in the state of Florida, and 64th (2015) and 34th (2016) nationally on the list of "America's Best Employers" across all industries in both the public and private sectors. In 2016, *The Chronicle of Higher Education* elevated FIU to Honor Roll status on its "Great Colleges to Work For" list.

These accolades do not happen in a vacuum or overnight, but rather are a testament to the workplace culture that has been built in collaboration with faculty, staff and students.

HR as Strategist

As higher ed continues to navigate financial challenges, HR professionals have an opportunity to present optimal solutions that impact the bottom line while allowing for necessary growth in areas to better serve students and engage the workforce. Finding meaningful ways to develop and engage a diverse workforce to drive performance (which in turn drives excellence) requires a multi-pronged approach, and at FIU that approach includes innovative thinking, collaboration and cross-functional partnerships, institution-wide buy-in and the professional knowledge and strength of HR leadership.

Trudy Fernandez is director of HR relations at Florida International University. She can be reached at tfernand@fiu.edu.

The Pros and Cons of Using Social Media in Vetting Job Applicants

By Maureen De Armond

Every HR professional knows the enduring headache that can accompany a bad hire. Unquestionably, vetting job applicants is a critical component of the decision-making process intended to prevent such headaches. But applicant vetting can be easier said than done, and there are many more ways to do it poorly (or even disastrously) than to do it well.

In today's society, the internet has become a tempting avenue for applicant vetting. While much has been written about the legal risks of Googling job applicants, it remains a tool many organizations use — often without taking appropriate steps to manage the risks and maximize the potential rewards. Here, we'll explore some of these risks and rewards.

Don't Do It

Imagine you're looking through a fresh batch of job applications, and one catches your eye. The listed home address happens to be only a few blocks from your own house. You start thinking … maybe just a quick drive by the residence would be insightful — you can see if the person's lawn is neatly mowed, if the car in the driveway is clean, if the house is in good condition. Maybe these observations will give you some insight into whether the applicant is a responsible citizen. And why not just drive by? It's convenient, it doesn't cost anything, it'll only take a minute, and no one will know.

Pause for reflection: Sounds a bit creepy, no? So my question is this: Is Googling that applicant really all that different from such a drive-by?

Let's say you do drive by the address on the application, and you see that the house is in good condition, the lawn is perfect, and the gutters appear to be leaf-free. But you also see a wheelchair ramp, a Breast Cancer Survivor bumper sticker on the car in the driveway, and a rainbow flag on the front porch.

Pause for reflection: While you certainly didn't go to the house looking for bumper stickers, gay pride flags or wheelchair ramps, you saw what you saw, and have likely drawn some conclusions about the applicant based on these observations. Is there any way for you to now un-see these displays?

When it comes to an applicant's membership in a protected class, employers are in a better place if they simply do not know. You're better off being able to say you didn't know an applicant was a member of a protected class than to argue that you knew, but that the knowledge didn't impact your decision making.

Hopefully, we can all agree that the drive-by is an ill-advised idea. Would it be an equally bad idea to Google the same applicant? Might you find the same types of information shared on their Facebook account, Twitter feed, LinkedIn profile or personal blog?

A preliminary question should always be, "Is there legal guidance on the topic?" One of the first places to look for such guidance is the Equal Employment Opportunity Commission (EEOC). In a 2014 meeting examining the use of social media in the hiring process, the EEOC acknowledged that "the use of sites such as LinkedIn and Facebook can provide a valuable tool for identifying good candidates by searching for specific qualifications," but also noted that "the improper use of information obtained from such sites may be discriminatory since most individuals' race, gender, general age and possibly ethnicity can be discerned from information on these sites." Unfortunately, to date, the EEOC has not offered any detailed guidance; however, employers should heed its broad warnings about potential discriminatory risks.

In the absence of federal guidance, we must turn to research and high-profile cases — and recent research supports the premise that employers will indeed discriminate against applicants when put on notice about certain protected classes. A recent Carnegie Mellon study created dummy resumes and social media profiles for real job openings and tested whether hiring decisions might be swayed by social media profiles showing applicants were homosexual versus heterosexual, Republican versus Democrat and Christian versus Muslim — and bias was indeed detected, with the study finding "robust evidence of discrimination" among certain types of employers. (For more on this study, see the paper "An Experiment in Hiring Discrimination Via Online Social Networks" by Acquisti and Fong.)

A similar study was conducted by Syracuse and Rutgers, but focusing on applicants with disabilities. This study also found bias. In fact, the researchers stated they were "astounded" by the degree of disinterest in applicants who had disclosed disabilities. (For more on this study, see the paper "The Disability Employment Puzzle: A Field Experiment on Employer Hiring Behavior" by Ameri, Schur, Adya, Bentley, McKay and Kruse.)

And what if you adopt a practice of screening online information and you find nothing about a candidate at all? Should the absence of information count against a candidate? The Pew Research Center in two separate studies found that certain protected classes are less likely to be online — including people with disabilities and Latinos. Thus, lowering an applicant's "score" based on the absence of an online presence could have a disparate impact on these groups.

Aside from unlawful discrimination, there are other risks of reviewing online postings and comments of applicants. What if the employer is arbitrarily influenced by topics unrelated to protected class status (and equally unrelated to the person's qualifications to do the job), such as their sense of humor, their favorite sports team, their thoughts on

global warming or free trade? It would be unfortunate to let subtle (even if not unlawful) biases influence the vetting of candidates. Further, the internet could be providing you with incorrect or misleading information. Think back to the drive-by scenario — imagine that you misread the address on the application and drove by the wrong house? You believed you learned all kinds of "things" about the applicant, but it was a neighbor's house, not the applicant's. The same can happen on the internet. What if you are taking into consideration the online materials about the wrong John Smith? The information could also easily be inaccurate, dated or posted in jest. In other words, you could be drawing meaningless — and unfair — conclusions about an otherwise viable applicant.

Do It

Now that we've made the case for not vetting applicants on the internet, let's look at the flip side. Undeniably, there can be important, relevant and compelling information about an applicant online. As we vet applicants (particularly finalists in the closing steps of the process), we need to exercise due diligence when checking into their character, background and credentials.

Colleges and universities support many high-profile positions, and we all know if there is a newly hired president, dean of students, football coach, etc., the media, many alumni, students, faculty and staff, and members of the community may be Googling that new hire — and they should not be discovering things about the new hire that are not already known to those directly involved in the hiring process.

Pause for reflection: Do educated professionals really post outrageous comments on publicly accessible websites, and should that information be fair game in assessing professionalism?

You bet they do, and it most certainly is fair game. Take the example of Geoffrey Miller, an evolutionary psychology professor at the University of New Mexico who was serving as a visiting professor at the NYU Stern Business School in 2013 when he posted a fat-shaming tweet reading: "Dear obese Ph.D. applicant: If you don't have the willpower to stop eating carbs, you won't have the willpower to do a dissertation. #truth."

Or, take the Facebook posts of Gloria Gadsden, a sociology professor at East Stroudsburg University who wrote in 2010: "Does anyone know where to find a very discreet hitman? Yes, it's been that kind of day …" and then posted

again a month later: "Had a good day today, didn't want to kill even one student [smiley face emoticon] … now Friday was a different story."

Pause for reflection: Would you want to hire a Dr. Miller or a Dr. Gadsden at your institution? Are you confident your current vetting processes would catch these types of attitudes?

What other kinds of information might you find online about an applicant that could be beneficial to know up front? Some examples include:

- Discriminatory comments and comments that do not reflect your institutional values (such as blatantly sexist, racist or homophobic views);

- Posts and photographs admitting to criminal behavior;

- Inappropriate disclosures of confidential information (information protected by FERPA or HIPAA, or personnel information);

- Illustrations of incompetence, dishonesty, a poor work ethic or poor judgment; and

- Inconsistent or contradictory information about job history, education, publications, etc.

No one wants to make a bad hire. Missing publicly accessible information — especially of the outrageous and inflammatory nature — seems sloppy in our modern digital age. We also don't want to be caught by surprise or confronted with information by the media, angry donors, unhappy alumni or disappointed students.

With the risks and possible rewards in mind, how should one proceed?

A Spectrum of Options

For institutions that have not yet adopted a process or philosophy for using online information in vetting job candidates, there are at least four viable courses of action.

The Wild West

The first option is to have no policy regarding online vetting. One might also refer to this option as the Wild West. Maybe you simply have more burning issues to address, and this topic has not yet created any measurable problems at your institution. You may have confidence that the key people involved in vetting candidates simply know better than to Google candidates. But, understand that people will Google. These people will include members of

the search committee (if there is one); coworkers (particularly after meeting finalists); and, for high-profile positions specifically, the media, alumni, donors, students, and faculty and staff. For high-profile positions where names are published, finalists may even Google other finalists. If you are not doing the same, these groups of interested individuals may see and know (or think they know) more about your finalists than you do.

Think about the highly publicized handling of Steven Salaita's inflammatory tweets taken into consideration after the University of Illinois had already offered him a position. In that situation, a local newspaper printed several of Dr. Salaita's anti-Israel tweets, which resulted in the Simon Wiesenthal Center contacting the university. Additional complaints quickly poured in, including complaints from many donors. The job offer was rescinded and a very long, very public and very costly legal battle ensued.

Pause for reflection: Had the University of Illinois reviewed and taken into consideration the public and numerous tweets during its vetting process, would the university have offered Dr. Salaita the position in the first place? It is impossible to know, but at least it would have had a process to rely on to justify why the tweets were or were not taken into account during the vetting process.

Ban the Practice of Online Vetting
A second option is to "ban" the practice of Googling candidates. Inform those involved in search processes that your institution has weighed the pros and cons and has decided that this is not a reliable, time-efficient or effective way to vet candidates. If your policy is to ban online vetting, then you may discipline anyone involved in the searches who violates this position.

One of the drawbacks: people will still Google candidates, despite a ban. Certainly those high-profile finalists will still be cyberstalked by interested parties. Another downside: you could miss out on information that could be relevant and helpful in making final decisions.

Screen All Applicants
A third option sits at the other end of the spectrum — screen everyone. Adopt an online search process that applies to all positions. You could develop varying degrees of intrusiveness — a third-shift custodian (while still an important position at a college or university) does not likely need the same amount of time and scrutiny as, say, your

new director of government relations or your head football coach. With such a policy, applicants should be informed and have an opportunity to offer an explanation if there is anything potentially harmful (as you may offer with a candidate who has had a prior criminal conviction or has previously been terminated).

One drawback of vetting everyone: this is not efficient in regards to time or money. If you have the capacity to add this step to your vetting process, consider instead conducting more in-depth interviews and calling more references.

> **To the extent possible, searching online for information about job finalists should be consistent, not just a wild goose chase.**

Only Vet Applicants for Certain Positions
The final option is to vet only designated positions, possibly based on some combination of pay grade, job duties and/or visibility of the position. Analogous to credit checks, this part of the background check process would only be utilized with select positions.

However, you would need to think carefully about where you draw the line — these decisions would need to be made at the institutional level, and after discussions with the appropriate stakeholders. Would the provost support checking all faculty, lecturers and adjuncts? What about visiting professors? Would the athletic director support a check of all athletic department staff, even those with low-paying jobs and positions not likely to be in the spotlight? Maybe — but how can you know if you don't have the conversation first?

In short, such an approach has some clear advantages, but there would need to be substantial discussion to get to the point where the lines could be drawn based on consensus. Despite the apparent advantages, one drawback could be that you may miss some outrageous online conduct by non-selected positions.

Building a Process or Policy
If you do decide to move forward with a policy or written guidance on how your institution may use online information to vet applicants, here are some key components you should take into account:

Provide Training on Your Online Vetting Policy
Creating a policy isn't enough — those involved in the search process must also be trained on the policy. It would be wise to assure that anyone directly involved in a search signs off on receipt and understanding of the policy.

Be Transparent
Be sure that your online vetting process is transparent, not only to the hiring unit and the people involved in the search, but also to the applicants — as they should understand by what standards they are being assessed and judged.

When your university makes a high-profile hire, you can be sure the media, alumni, students, faculty and staff, and members of the community are Googling that person — and they should not be discovering things not already known to those directly involved in the hiring process.

Be Able to Explain the "Why"
You must be able to articulate (via a policy or conversation) how and why you are assessing and reviewing online information. Be prepared to answer questions from candidates regarding why online vetting is important or relevant to their application for the position. If you cannot defend your practices, you may need to reconsider adopting them.

Consider Timing
Consider the importance of timing in two key ways: 1) when to inform the applicants and those involved in the search process that online vetting will be taking place, and 2) when to conduct the online vetting. Applicants and people involved in searches should know from the very start what your process is. However, online vetting of applicants should not be conducted until you have already met with finalists. This is recommended by the EEOC, as you will likely already be aware of some protected class status after you have met the candidate in person (e.g., gender, visible disabilities, visible pregnancy, some presumption about race, etc.). This helps limit some of the potential legal risks associated with learning "too much" by reviewing online information.

Assign the Online Vetting to an Objective and Neutral Third Party
Who will conduct the applicant vetting? If you want maximum protection, engage a third-party vendor and set search parameters for them. Alternatively, have someone not employed by the hiring unit and not involved in the hiring process conduct the online search. Or perhaps someone in HR conducts the searches.

Standardize the Online Vetting Process
To the extent possible, searching for information about finalists should be consistent, not just a wild goose chase. Are you checking certain sites? LinkedIn, Google Scholars? If you search, each search should be similar. As with other aspects of the vetting process, all finalists should be treated in a similar fashion.

Appropriately Weight the Findings
What do you do with the findings? Keeping in mind the Pew Research Center's studies discussed above, online content should not add value to a candidate's application. You should only be screening out based on substantiated and substantial red flags. If you find red flags, do you offer the finalist the opportunity to explain? Would you do the same for a finding during a criminal background check? Consider taking similar positions. You don't want to rely on inaccurate information — what if the red flag is associated with a different John Smith? It wouldn't be fair to the candidate if he or she were screened out of consideration based on your assessment of a different person with the same name.

Document Your Process
As with any other facet in your hiring and vetting process, you should properly document what you did, when, why and the steps you took as a result thereof. You should also periodically assess whether your online vetting process is adding value to your organization's search process.

A Thoughtful Approach

As an HR professional, consider the need for fostering a thoughtful and measured discussion about what makes the most sense for your institution when it comes to the online vetting of applicants. Remember to seek legal counsel and take into account any relevant state laws. Appropriately addressing the risks and potential rewards of online vetting will take time, effort and much discussion, but such a thoughtful and strategic approach is necessary to ensure the fair, consistent and lawful treatment of your job applicants.

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Pros and Cons of Various Approaches to Online Vetting of Job Applicants

The Wild West	Complete Ban	Screen Everyone	Screen Select Few
Con: No policy or guidance	Pro: Clear policy	Pro: Clear policy	Pro: Policy adopted (but may be subject to some interpretation)
Con: No regulated consistency between searches, candidates, positions	Pro: Appearance of consistency — everyone is treated the same	Pro: Consistent standard — everyone is treated the same	Pro: Consistent standard (but still subject to some interpretation)
Con: Greatest legal risks	Con: Despite ban, candidates will still likely be Googled	Con: Not efficient in regards to time or money	Con: Potential lack of clarity of applicability
Con: Greatest risk for unfair and inconsistent treatment of applicants	Con: Risk for missing important information	Con: Overly intrusive	Con: Perhaps no screening of positions where information would have been helpful

Want to learn more about the role social media should and shouldn't play in the vetting of job applicants? View CUPA-HR's free, on-demand webinar "Social Media, Cyberstalking and the Hiring Process" to hear about the established legal risks of searching online for information on job applicants, real-life examples of candidate cyberstalking gone bad and recent academic research on this ever-evolving topic.

www.cupahr.org/events/webinars.aspx

Building an Organizational Culture of Work/Life Balance and Wellbeing

For many of us, work is no longer simply an eight-hour day in the office. With more and more to do, and with the technology to be able to get it done from just about anywhere, work has become a constant presence. Add to that the stresses and busyness of everyday life, and trying to get everything done we need to get done in a day can quickly become overwhelming, and sometimes seemingly impossible.

In an effort to increase morale and engagement and reduce employee stress levels, George Mason University (Mason) is placing a strategic emphasis on work/life balance and employee wellbeing. Part of Mason's strategic plan is

to "become a model well-being university that allows all of its members to thrive." As such, the university's human resources organization has gone to great lengths to implement a wide range of programming and resources to help Mason employees navigate the ins and outs of work and life and focus on their wellbeing.

Supporting the Whole Person

Mason's life/work connections team (which is housed in HR) has created and/or sponsors several wellbeing and work/life programs and events designed around Gallup's five essential elements of wellbeing: career wellbeing (liking what you do every day); social wellbeing (having

strong relationships); financial wellbeing (effectively managing your economic life); physical wellbeing (good health and enough energy to get things done); and community wellbeing (engagement with where you work and live).

Who's Walking Wednesday

Every Wednesday, each Mason campus hosts a 30-minute lunchtime group walk with a designated "walk leader." Walk leaders have included the university's president, the provost and several other senior leaders. Those who wish to lead the walk can sign up online, and walkers simply meet at a designated start spot. The walk leader can take the group anywhere on campus. When the vice president of student affairs led the walk, she took the group to one of the student centers to play skee ball. The route taken by the vice president of facilities had some interesting stops along the way, including a construction project that was underway, circus animals outside Mason's event area, and the university's hydroponic greenhouse.

Says Janet Walker, life/work connections manager at Mason, "Aside from getting people out and moving during their day, these walks are an excellent way to showcase different parts of the university that some people may have never seen. They're a great way to promote collegiality, collaboration and a feeling of community — and they don't cost a thing."

Mason Walk In'

Exercising outdoors isn't for everyone, so Mason's wellness team has mapped out one-mile "trails" within 18 campus buildings. "If it's too cold or too hot outside or if it's raining or snowing, employees can still get in a one-mile walk during their workday," says Walker.

DMV2Go

Once a month, the department of motor vehicles mobile services unit comes to Mason. This DMV "office on wheels" offers services like driver's license and license plate renewals, driving tests, issuing identification cards and hunting and fishing licenses, and more. In 2016, there were more than 1,000 transactions at DMV2Go at Mason.

Employee Resource Groups

Mason has several employee resource groups — working mothers, working fathers, a needlework group (which does charitable projects outside the university but also makes baby hats in Mason colors that are given to new parents who work at the university), a vegan society, a group for administrative professionals, a toastmasters group, an adult caregivers support group and more.

Caregiver Support

Through a vendor, Mason faculty, staff and graduate students have access to a database of in-home caregivers for childcare, eldercare, pet care and home care, as well as resources related to caregiving.

> **You can't just turn off work when you go home at the end of the day, and you can't turn off home when you walk in the door to work.**

Financial Wellbeing

Human resources has teamed up with several of Mason's financial services providers and other experts to bring seminars and resources to campus and online with the goal of providing opportunities for faculty and staff to increase their financial knowledge and prepare for life's expected and unexpected events. Programs are held throughout the academic year and, according to Walker, are always well attended.

Flex Work

Mason offers many options for a flexible work schedule, including a compressed work schedule, flex time, job sharing, and remote work and telework (both long-term and short-term). "The flex work option is very popular, and we try to accommodate whenever we can," says Walker.

Spring Into Well-being

HR has partnered with Mason's Center for the Advancement of Well-Being and student affairs to promote under one umbrella all of the various health and wellness activities happening across campus each spring.

If at First You Don't Succeed …

While Mason's leadership is supportive of HR's efforts around employee wellbeing and work/life balance, there were a few hard-fought wins along the way, says Linda

Harber, head of human resources. She credits persistence and thoughtful timing for gaining university leadership support in these instances. For example, Harber and her team tried several times to rework the university's maternity leave policy for nine-month faculty, but the idea never gained traction with leadership. But she stuck with it. "After a significant leadership change a couple of years ago where we saw some new individuals and some women move into leadership positions, I again brought up the possibility of a parental leave model to replace our maternity leave policy, and they showed some interest," she says. Working with faculty groups, deans and senior leadership, Harber was able to implement a robust parental leave policy for the university's faculty.

Another example: an extended winter break for staff. Harber presented the idea to leadership year after year, but was met with resistance for various reasons. One year when the university was facing a budget crunch and was unable to provide salary increases, Harber again pitched the idea as a perk for staff. "Since staff weren't seeing raises that year, I thought some extra paid time off around the holidays might be a nice way for Mason to say 'thanks for all you do,'" she says. Leadership agreed to a trial run that year, and it stuck. "This extra time off around the holidays to truly unplug from work is incredibly appreciated and valued by Mason staff and leadership."

How to Be a Culture Turner

When embarking upon an effort to embed wellbeing and work/life balance into organizational culture, Harber notes that it's important to distinguish between "perks" and "culture." Perks, she says, are a material investment to achieve short-term happiness. They are easy to implement and easy to replicate. While flashy perks may attract talent, they won't help an organization retain talent. Culture, on the other hand, is an emotional investment. Organizational culture is difficult to build and hard to replicate. "However, when done right, organizational culture can not only help bring people in, but also make them want to stay and bring their best selves to work every day," she says.

Harber offers the following tips on how HR can be a culture turner in an organization:

- Engage senior leadership, faculty and staff in the effort;

- Place a continuous focus on listening;

- Collaborate whenever and wherever possible, and find your natural partners within the organization;

- Keep track of results and present this data to leadership on at least an annual basis; and

- Be flexible, be patient, and be nimble.

"The most difficult part is getting started," says Harber. But she has some suggestions for action steps that can get the ball rolling:

- Reach out to a potential university partner;

- Reach out to a potential community partner;

- Survey faculty and staff on what they need (Harber and her team, along with representatives from across the university, collaborate with a psychology faculty member to design Mason's wellbeing and work/life survey, which is administered every three years);

- Create a working group to look at wellbeing options;

- Have a conversation with senior leaders; and/or

- Brainstorm low-cost/no-cost wellbeing options that are easy to implement.

A Happier, Healthier Workforce

Walker sums it up perfectly. "You can't just turn off work when you go home at the end of the day, and you can't turn off home when you walk in the door to work. Home and life circumstances have an impact on your work, and work has an impact on your home and life circumstances." It's Walker's team's job to help lessen that impact.

"By providing the level of support and resources we do, we're taking deliberate steps to shift perceptions around work/life and wellbeing; attract, engage and retain talented staff and faculty; and create a happier, healthier workforce," says Walker. "People want to work here, and they want to stay here, because they know Mason cares about their wellbeing, their health and their happiness."

To learn more about George Mason University's life/work and wellbeing efforts, visit the life/work connections web page at **http://hr.gmu.edu/worklife/**, view the CUPA-HR on-demand webinar "HR Be Nimble: Work/Life and Well-being" (**www.cupahr.org/events/webinars.aspx**), or contact Mason's life/work connections manager, Janet Walker, at **jwalker8@gmu.edu**.

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Passing the Fairness Test:
The Case Against Per Capita Fees in Defined Contribution Plans

By Edward Moslander, Benjamin Goodman and David P. Richardson

Greater transparency has helped defined contribution plan sponsors better determine the reasonableness of fees, but their fiduciary obligation doesn't end there. Plan sponsors are also responsible for the fair and appropriate allocation of fees paid by participants. Many in the retirement industry have argued that a flat-dollar per participant fee (per capita fee) is the fairest approach for sponsors to cover plan administrative costs. While we agree that this approach may be simple and transparent, we believe it fails the test of fairness. When all factors are considered, we believe a pro rata fee — a percentage fee based on a participant's account balance — may generally be considered fairer for participants and just as efficient.

Defining "Fair"

Simply speaking, fee fairness means that everyone should pay a fair share of the fees required to maintain a plan. But like many concepts that seem simple at first glance, choosing the fairest way to assess participant fees is more involved. Achieving fee fairness depends on how a plan sponsor applies fees. One method that seems like a fair approach for all may benefit some participants more than others.

More Than a Quick Assessment

Beyond investment-related expenses, plan sponsors typically incur fees for administrative services such as recordkeeping, accounting, legal and trustee services, customer service and participant communications. In general, plan sponsors pass along these administrative fees to participants in one of three ways: per capita, pro rata or a hybrid of the two. Per capita fees charge participants a fixed-dollar amount. Pro rata fees charge a percentage of employees' assets. Hybrid fees are a newer trend that use both per capita and pro rata components.

In the absence of ERISA provisions specifically addressing how plan expenses may be allocated among participants and beneficiaries, the Department of Labor leaves plan sponsors with flexibility on which approach to follow. That's why it's important for plan sponsors to understand the implications of the different fee structures. A quick assessment may suggest that allocating the same flat-dollar fee (per capita fee) to all participants is the fairest approach. But if plan sponsors take the analysis further, they may see very little that is fair about this approach. Once plan sponsors dig deeper, they'll find that participant demographics play a role too critical to overlook.

Consider Fairness Criteria

To be fair and equitable, a fee structure must satisfy one or more fairness criteria. Two important fee fairness concepts to consider are horizontal equity and vertical equity. Horizontal equity means that participants in a similar financial condition should pay similar amounts in fees. It is possible to define this goal across a number of categories — assets, salary, tenure or perhaps some combination of these measures. From a plan fee perspective, using assets as the preferred option for assessing horizontal equity is simple and transparent. Under this metric, participants with similar levels of assets should pay similar amounts in fees.

A quick assessment may suggest that allocating the same flat-dollar fee to all participants is the fairest approach. But if plan sponsors take the analysis further, they may see very little that is fair about this approach.

Vertical equity means that participants who are better off should pay at least the same proportion of fees as those who are less well off. Plan sponsors can use asset levels as an appropriate measure for "well-off" or ability to pay. By looking across asset levels — a simple and transparent metric — it's possible to see if wealthier participants (from a plan asset perspective) are paying at least the same proportion of fees as those with lower levels of assets.

The Social Security Analogy

It can be helpful to look at how fees are treated in other settings. Social Security provides an especially strong public-sector parallel to retirement plans. Both Social Security and institutional retirement plans offer services available to everyone (citizens in the case of a government public good like Social Security, and participants in the case of retirement plans). These services are available without consideration as to who pays for them or who uses plan services more than others. With Social Security, administrative fees are necessary for the system to function and pay for services, regardless of whether any particular citizen calls or visits Social Security in any given year. Currently, these administrative costs are paid by revenue

collected from the pro rata payroll tax on workers' earnings. The government could, however, pay for these services by charging a flat per capita tax on the roughly 320 million people currently in their database. While this type of fee levelization is transparent and simple, few would argue that it's fair for the unemployed (including children, the elderly and the disabled) and low-income workers to pay the same fee as those with greater ability to pay.
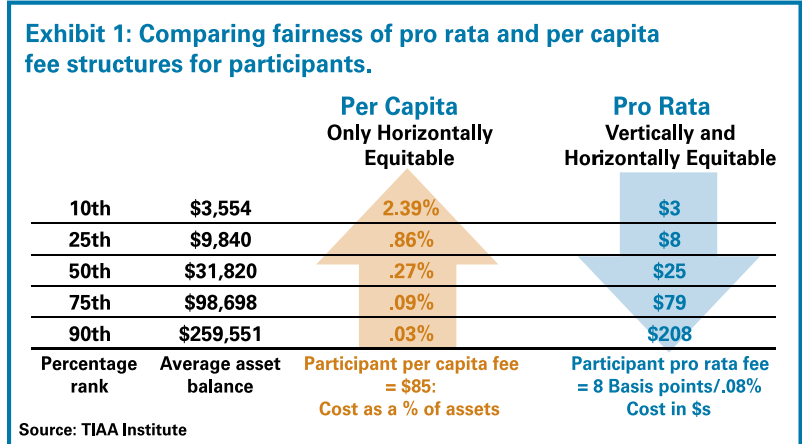
Yet, that is precisely what a per capita fee in a retirement plan does — those with low levels of assets pay significantly higher fee rates in their early-career years than the higher accumulators. And this has more than just a short-term impact. Due to the lifetime compounding effect (the ability to generate growth by reinvesting existing earnings), the participant never makes up for those excess fees and pays the price over his or her entire career.

Thus, we would argue that using pro rata fees is the fairest approach. This avoids a regressive fee structure in which the proportion of fees paid by participants declines as their asset levels increase. A simple flat per capita fee may satisfy horizontal equity, but violates vertical equity because low-asset-level participants pay a much higher proportion in fees than those with a high level of assets. This makes per capita fees regressive. It may also result in the plan discriminating in favor of highly compensated or key employees by providing them with a fee advantage over other participants. Hybrid fees are less regressive than per capita fees, but also fail the fairness test.

Putting It to the Test: Comparing Pro Rata and Per Capita Fee Structures

Evaluating participant pro rata and per capita fees with real plan data illustrates the effects of each fee structure on plan participants and makes it easier to understand what is fair. With this goal in mind, we analyzed a plan with more than $500 million in assets and over 4,700 participants. In this example, two fee structures are compared — one with a pro rata fee and the other with a per capita fee. To make the comparison easier, we express the pro rata fee (8 basis points or .08 percent) in terms of actual dollar cost and the per capita fee ($85) as a percentage cost. It's important to note that each fee structure raises the same level of revenue to cover plan costs.

The chart below compares per capita and pro rata fees allocated to plan participants according to their ranking by assets. For example, participants in the 10th percentile rank in the lowest 10 percent of all participants according to their account balance. Conversely, participants in the 90th percentile rank in the top 10 percent of participants.

Exhibit 1: Comparing fairness of pro rata and per capita fee structures for participants.

Percentage rank	Average asset balance	Per Capita Only Horizontally Equitable Participant per capita fee = $85: Cost as a % of assets	Pro Rata Vertically and Horizontally Equitable Participant pro rata fee = 8 Basis points/.08% Cost in $s
10th	$3,554	2.39%	$3
25th	$9,840	.86%	$8
50th	$31,820	.27%	$25
75th	$98,698	.09%	$79
90th	$259,551	.03%	$208

Source: TIAA Institute

Even these basic statistics reveal that a per capita administrative services fee would be highly regressive — participants who are starting to build their retirement savings accounts are shouldering a greater proportion of the costs than those with substantially higher account balances. Simply stated, the many participants with small account balances are subsidizing those few participants with high account balances.

In both fee structures, participants with similar levels of assets pay similar amounts in fees and meet the horizontal equity measure. The pro rata fee also satisfies vertical equity — participants with larger balances pay at least the same proportion of fees as those with smaller asset balances. By contrast, the per capita fee approach does not meet the definition of vertical equity, and wealthier participants pay a much smaller proportion of fees than those with lower account balances. Note that with a pro rata fee, participants with the highest account balances pay substantially more in fees (73 times more in fact) than those with the lowest account balances.

Per Capita Fails the Fairness Test

Selecting a fair fee system requires more than a passing glance by plan sponsors — it deserves careful analysis based on participant demographics and how equitable each fee system is for participants with varying account balances. While at first blush per capita fees may appear

fair, it's worth remembering that features such as simplicity and transparency do not make them equitable.

While no system is perfect, plan sponsors should consider how a pro rata approach can help them meet their fiduciary responsibilities by ensuring their fees are reasonable and fairly distributed among participants. Most plan sponsors understand that participant contributions and investment performance are factors that greatly impact long-term retirement outcomes for their employees. With better outcomes in mind, the fair application of fees is another critical test that plan sponsors should make every effort to pass. ⬭

Edward Moslander *is retired from TIAA, where he served for many years as senior managing director and head of institutional client services.*

Benjamin Goodman *is vice president and senior actuary at TIAA.*

David P. Richardson *is senior economist at TIAA Institute.*

What Questions Should I Be Asking as a Plan Sponsor?

Fifteen prominent universities have been sued recently, accused of allowing their employees to be charged excessive fees on their retirement savings and otherwise mismanaging their 403(b) plans. By asking and seeking answers to the following questions, retirement plan sponsors can ensure they have all of the information they need to make prudent decisions.

Recordkeepers

- How are the plan's recordkeepers selected?
- How often are they re-evaluated?
- Is a benchmarking study performed?
- How many recordkeepers are there?
- How are they compensated (fixed-fee, revenue sharing, expense ratio)?

Fund Selection and Retention

- How are the investment options selected?
- Are they duplicative?
- How many options are there?
- Is there a tiered structure in place?
- What processes are in place to monitor investment performance?
- Are there any procedures for removing poorly performing investment options?
- Are any conflicts apparent?

Monitoring Fiduciaries

- Who is responsible for monitoring co-fiduciaries?
- What processes are in place to monitor and remove co-fiduciaries, if necessary?

THE WILDFIRE EXPERIENCE:
TAKEAWAYS, ADVICE AND LESSONS LEARNED

CUPA-HR's Wildfire program is a unique learning and development opportunity for individuals just starting out in their higher education human resources career. A year-long immersive experience, the program connects a small, select group of early-career higher ed HR professionals with CUPA-HR, key association leaders and multiple learning opportunities.

As the 2016-17 program winds down, we caught up with this year's participants to chat with them about what they've learned from their Wildfire experience and what the program has meant to them personally and professionally, as well as their thoughts on how managers and leaders can cultivate and support their early-career professionals.

Katryn Stewart
Employee Relations Specialist, Virginia Tech

What are your top three takeaways from your Wildfire experience?

1) There is always something you don't know.

2) Perspective is sometimes more valuable than experience.

3) If you ask, someone will answer.

What for you has been the most rewarding part of the program?

For me, one of the most beneficial aspects of the Wildfire program has been the relationships I've formed within my cohort. HR can be a lonely place — everything is confidential; every relationship is suspect for political agenda; every conversation carries with it the weight of future perceptions. The Wildfire program placed me into a cohort of intelligent, like-minded individuals to whom I can go with even the silliest of questions and from whom I can receive the broadest range of well-thought-out answers.

What is the best piece of advice you've received as an early-career higher ed HR professional, and how has this advice helped you or motivated you in your work?

The best piece of advice I have received is that you will never know everything — and no one expects you to. This advice reminds me that it is necessary to constantly be learning, and that people are okay with you asking questions. It also encourages me that while I do need to be the expert in my area, I do not need to be the expert in everyone else's areas. I need to actively seek out the information I need from other sources in order to make the best decisions I can, but I can never assume I know everything. A long time ago my father gave me a bracelet I wear daily that reads "Ancora Imparo" — loosely translated as "Still I am Learning." And I do believe that there is always something else to learn.

What one piece of advice would you offer to those managing early-career higher ed HR professionals in order to help them excel in their work?

Create opportunities for your early-career folks to stretch their wings and succeed. Trust the people you hire to do their jobs well, and encourage them to push the boundaries of their jobs, their knowledge and their experiences.

Veronica Lenegan
HR Coordinator, Stanford University

Top three takeaways:

1) Continual learning is the key to professional and personal growth and to serving our institutions well.

2) Be of service to others.

3) Mentorship matters, be that as a peer relationship or between those at different stages of their careers. Learning from one another motivates, inspires and enriches the experiences and careers of everyone involved.

Most rewarding part of the program:

I've been fortunate to have connected through my Wildfire experience with the CUPA-HR Northern/Central California Chapter, where I currently serve as secretary on the board of directors. The chapter work with my fellow board members has proven very rewarding and formative, and their committed, collaborative, generous examples of volunteer leadership in action continue to inspire me.

Best piece of advice you've received:

Model what you value and hope to see in the workplace. That is to say, genuinely lead by example. What you say, what you do and how you do it matters, as others notice the little, the big and the in between. It takes continual effort

to build and cultivate meaningful and healthy relationships (and reputations), and mere moments to watch them unravel or dissolve. Relationships (at work and in life) require continual care.

Advice for leaders/managers of early-career professionals:

Know that we are interested in you, your journey, your insights, your career, and that we enjoy hearing your stories. Know that we value and recognize good leadership and are looking to see that imperfect yet consistent example in action. Try also to cultivate a genuine relationship of mutual interest in and care of/for one another, which will serve both parties and the functionality of the department/team and institution.

Kristina Gravellese
Recruiter, Harvard T.H. Chan School of Public Health

Top three takeaways:

1) The value of networking. I am now connected to colleagues from all across the country at all levels in their careers that I can reach out to at any time.

2) There are opportunities for learning everywhere. Whether you are entry-level or a chief HR officer, there is always something to learn. Yes, about the rules, laws, regulations, etc. that govern the work that we do, but also about each other and the work we can accomplish together.

3) Always challenge yourself and others.

Most rewarding part of the program:

The network of people that I was able to connect with through this program, and that I'm certain I will remain

connected with into the future (including HR thought leaders from across the country and the five amazing individuals in my Wildfire cohort that I now call close friends) is invaluable.

Best piece of advice you've received:

Slow down! Get to know those around you — your immediate team members, your clients, the departments you support, etc. Slow down enough to understand who they are, as well as their needs, so you can work with them most effectively. Also, slow down and learn. Take the time to understand your organization's structure so you can understand how your work contributes to the greater picture. Slow down — there are amazing things happening all around you!

Advice for leaders/managers of early-career professionals:

Present us with as many learning opportunities as possible, and expose us to as many areas/people as appropriate. Also, keep the line of communication open and clear. When I have open conversations with my manager, my team members, etc., we all walk away from the conversation feeling accomplished and informed. I can also say that feedback is key. Knowing what I'm doing right or well is great, but knowing what I'm doing wrong, what I can improve on, or what I may have missed in a given situation is invaluable. It's the only way I can grow and learn, and I truly value my manager's opinion and expertise.

Clarity White
HR Coordinator for the School of International Languages, Literatures and Cultures, University of Arizona

Top three takeaways:

1) I now know for certain I am in the profession I want to be in. I'm not just working a job, but I have a career with growth potential.

2) Perseverance pays off. (I applied for the Wildfire program in 2015, but I wasn't chosen. So, I applied again last year, and here I am!)

3) CUPA-HR is a professional association filled with genuinely caring individuals, and we are all lucky to be part of it!

Most rewarding part of the program:
My Wildfire experience has helped me to rapidly bring my HR skills more in line with my overall years of experience. It has given me the community I didn't know I was seeking, as well as a strong sense of belonging.

Best piece of advice you've received:
The best piece of advice that I have received as an early-career higher ed HR professional was at a time when I was weighing whether or not to take a promotion to a position I knew wasn't a perfect fit for me. I called upon a professor from my undergraduate studies who has remained an important mentor to me, and his recommendation was, "Take the position, but don't lose sight of your goals."

I took his advice to heart, because I could already see how life gets busy and you don't always make time to keep moving toward your own goals. His words stuck with me, and I made a point to learn all I could while I was in that less-than-perfect position while also allowing myself time for thoughtful reflection on what I did want and keeping an eye out for other positions that would provide me with the job satisfaction I was seeking.

Advice for leaders/managers of early-career professionals:
I would urge managers to make time to find learning moments for early-career professionals. Along those lines, spend some time learning about the goals and aspirations of your employees, so you can identify opportunities fitting each individual's own goals. For some, frequently being challenged can keep the job exciting, whereas others may grow exhausted from always being asked to try something new. Knowing what makes your employees tick can help you foster an engaged and cohesive team.
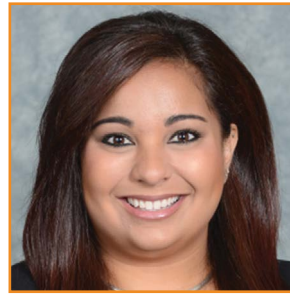
Andrea Alfano
HR Coordinator, Athletics Department, Georgia State University

Top three takeaways:
1) Be a lifelong learner.

2) I need to take a more transformational approach to my role. Anyone can learn how to do a job, but to be successful as a higher ed HR professional, I need to be advocate for myself to show that my role can be strategic and not just transactional.

3) Give back to the higher ed HR community. I've seen first-hand the value of the relationships and resources with which I've been provided through Wildfire, and I want to in turn be a mentor and motivator to other early-career higher ed HR professionals.

Most rewarding part of the program:
Wildfire surrounded me with dedicated and intelligent individuals who gave me the opportunity to explore areas of higher ed HR about which I was curious.

Best piece of advice you've received:
Network! This is something I've always been told, but once I started putting myself out there and introducing myself to people in the industry, I truly have seen the value of building and maintaining strong professional relationships. This advice motivated me to apply for the Wildfire program, and I have since built a solid network of higher ed HR professionals which I often tap as resources and for career advice.

Advice for leaders/managers of early-career professionals:

Provide your early-career staff with opportunities to voice their ideas and opinions. Many of us are eager to contribute more to our departments and institutions. The open support of our supervisors just might give us that confidence and reassurance we need to grow and become leaders in this field.

David Elliott
Senior HR Specialist,
Arcadia University

Top three takeaways:

1) The importance of continually working to improve my planning and communication skills.

2) Through Wildfire, I've learned a lot about other areas of HR, and the many ways of doing things in HR.

3) The importance of giving back to the professional community through service and volunteer leadership.

Most rewarding part of the program:

I feel as though being part of this group has unlocked something in me that motivates me to achieve something great to help the people I serve every day, empowers me to believe that it is possible, and connects me with those who can offer helpful advice and wisdom so that I can make it reality.

Best piece of advice you've received:

A former boss once told me to question everything and to verify everything I possibly can. This continues to remind me that in my work in HR, I always need to look for the reason we do things the way we do and the validity of things that are said and done.

Advice for leaders/managers of early-career professionals:

Take time to explain the big picture and how their work relates to it. Then, do things to stretch these professionals. Challenge them by giving them assignments or projects that are difficult or different from their normal routine, and a little above their level. Teach them accountability by giving them the space and autonomy to make a few mistakes here and there and to correct and learn from them. Share articles or books that you've found interesting or helpful and ask them to read them. Talk to them openly and honestly about growth and advancement. Finally, be intentional about establishing trust and openness.

NEOGOV

HR SOLUTIONS *for* HIGHER EDUCATION
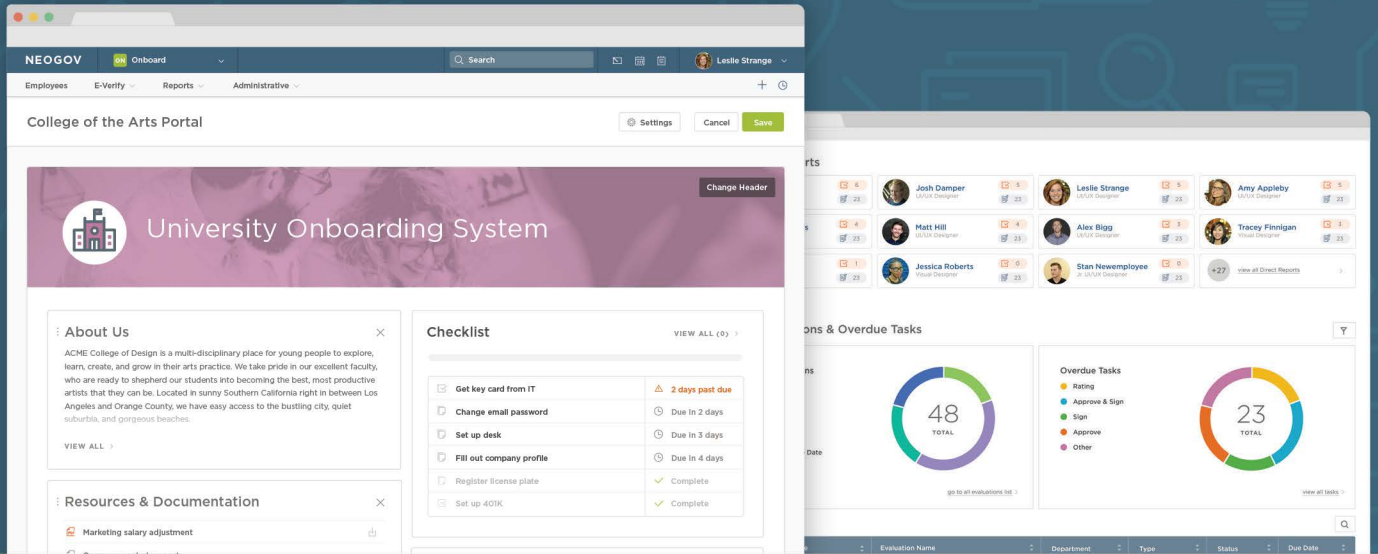
Insight

Applicant tracking software that automates hiring

- Search committee reviews
- Candidate reference letter uploads
- Electronic reference letter requests
- Multi-level requisition approval workflows
- Position control/management integration
- HRIS integrations

Onboard

Onboarding software that stimulates productivity

- Easy transfer of employee files to HRIS
- Onboard portals for multiple colleges
- Welcome video hosting
- Unique checklist and portals for faculty, student workers, staff, and executives
- Ability to use proprietary forms electronically

Perform

Full-featured employee evaluation software

- Department-specific performance goals and evaluation programs
- Faculty 360 reviews
- Executive 360 reviews
- College/University unique evaluation programs

cupa·hr™ Recommended Reading

Payoff: The Hidden Logic That Shapes Our Motivations (by Dan Ariely)
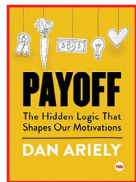
This book investigates the true nature of motivation, our partial blindness to the way it works and how we can bridge this gap. With studies that range from Intel to a kindergarten classroom, the author digs deep to find the root of motivation — how it works and how we can use this knowledge to approach important choices in our own lives.

HBR Guide to Dealing With Conflict
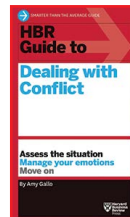
We all struggle with conflict at work. This book can help you understand the most common sources of conflict; explore your options for addressing a disagreement; recognize whether you — and your counterpart — typically seek or avoid conflict; prepare for and engage in a difficult conversation; manage your and your counterpart's emotions; develop a resolution together; and know when to walk away.

Decisive: How to Make Better Choices in Life and Work (by Chip Heath and Dan Heath)

This book introduces a four-step process designed to counteract biases in decision-making, taking readers on an unforgettable journey — from a rock star's ingenious decision-making trick to a CEO's disastrous acquisition to a single question that can often resolve thorny personal decisions. The book also answers questions like: How can we stop the cycle of agonizing over our decisions? How can we make group decisions without destructive politics? And how can we ensure that we don't overlook precious opportunities to change our course?

Chip Heath will be a featured keynote presenter at this year's CUPA-HR Annual Conference and Expo, to be held September 16–18 in San Diego, California.

An Everyone Culture: Becoming a Deliberately Developmental Organization (by Robert Kegan and Lisa Laskow Lahey)
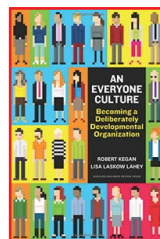
A deliberately developmental organization (DDO) fashions an organizational culture in which support of people's development is woven into the daily fabric of working life and the organization's regular operations, daily routines and conversations. This book takes a look at three leading companies that are using the DDO approach and reveals the design principles, concrete practices and underlying science at the heart of DDOs.

Congratulations to Our Newest Honorary Life Members

As a show of appreciation for their dedication to CUPA-HR over many years and a nod to their professional achievements, two former CUPA-HR volunteer leaders have been granted honorary life membership in the association.

Deborah Benton

Benton served in CUPA-HR leadership roles for 13 years at the chapter, regional and national levels. She began her service to the association in 2003 as secretary-treasurer on the Oklahoma Chapter board of directors and went on to serve as president of the chapter in 2006-07. She sat on the Southern Region board from 2008-16 and served as chair in 2013-14. Benton has also served on several CUPA-HR committees and as a guide in CUPA-HR's Wildfire program for early-career HR professionals. Benton retired in January after 21 years at Tulsa Community College. She held several human resources roles during her time at the college and taught several courses as an adjunct instructor.

Nancy Nelson

Nelson served in CUPA-HR leadership roles for 21 years beginning in 1983, when she joined the Rio Grande Chapter board of directors. From there, she went on to serve on the SouthWestern Region board, including a term as chair, and on the national board of directors, where her work focused on membership and government relations. Nelson has received several CUPA-HR awards and has presented many times at both regional and national CUPA-HR conferences. She retired at the end of 2016 from El Paso Community College.

cupa·hr™ Community

Welcome to CUPA-HR!
We're pleased to welcome our newest members to CUPA-HR.

Institutional Members:
Adventist University of Health Sciences
Allen University
Art Center College of Design
Ashland Community and Technical College
Brevard College
California College of the Arts
California Health Sciences University
College of the Mainland
College of the Siskiyous
Cox College of Nursing and Health Sciences
Germanna Community College
Goldfarb School of Nursing at Barnes-Jewish
    College
Holy Family University
Jefferson College of Health Sciences
Lynn University
Mayville State University
Northern New Mexico College
Prince George's Community College
Rocky Vista University
Southeast Arkansas College
State Technical College of Missouri
State University of New York At Delhi
State University of New York Health Science
    Center at Brooklyn
Treasure Valley Community College
University of Alabama System Office
West Chester University of Pennsylvania
Western Dakota Technical Institute

Corporate Members:
Academic Search, Inc.
ApplicantStack
Barran Liebman LLP
Carolinas Healthcare System
Evergreen Solutions
Harter, Secrest & Emery LLP
Qualified Plan Advisors
United Educators

Affiliate Members:
Associated Students, CSUF, Inc.
Louisiana State University Agricultural Center
National Association of College Stores
University of Arkansas - Division of Agriculture

Student Members:
Aneesa Baboolal
Ashraf Elazazi
Brittany Williams
Christian Lewis
Debbie Silkwood-Sherer
Donna Bowers
Dustin Parker
Emmanuel John
Greg Dedrick
Hannah Van Heukelom
Heidi Church
Jakeim Jackson
James Lynskey
Jasman Christophe
Jennifer Bonarek
Jessica Masters
JJ Mowder-Tinney
John Buford
John Michael Reesman
Karen Gordes
Kelly Musti
Kirk Peck
Kynan Bush
Moriah Rouse
Natasha Opoku
Osvaldo Del
Valle Patricia Pohl
Peter Rundquist
Priscilla Weaver
Rebekah Plemmons
Rowena Cassim-Sims
Sarah Case
Scott Bennie
Sharan Zirges
Tricia Catalino
Vanessa Wilson

Congratulations to this year's CUPA-HR Region Award recipients. These awards honor individuals, teams and HR departments for service to the association and excellence in higher education human resources.

Eastern Region
Lauren Rubitz of New Jersey Institute of Technology received the **Emerging Leader Award**, which recognizes outstanding leadership and leadership potential for an individual who is new to CUPA-HR or to a leadership role in CUPA-HR.

University of Pittsburgh's Benefits Team received the **Fred C. Ford Award**, which recognizes a significant and innovative idea that serves as a model for other institutions. The benefits team led the charge on the creation of an on-campus health and wellness clinic for university employees.

Pierre Joanis of Bucknell University received the **HR Excellence Award** for his role in guiding the university's HR organization through a difficult transaction between recruitment management system providers.

Midwest Region
Brenan Pergi of Franciscan University of Steubenville received the **HR Excellence Award** for his work in utilizing *The Chronicle of Higher Education's* Great Places to Work survey instrument as a mechanism to assess, develop and achieve enhanced employee engagement at Franciscan University.

University of Wisconsin's Talent Recruitment and Engagement Team received the **Successful Practices Award** for the successful implementation of the Talent Recruitment and Engagement Management System, which has helped the university's academic and administrative units better understand the critical nature of HR functions and resources.

Southern Region
Emory University's Learning and Organizational Development Department received the **HR Excellence Award** for its development of several new and improved leadership development programs.

Deborah Benton, who recently retired from Tulsa Community College, received the **Distinguished Service Award** for her many years of service and leadership to the CUPA-HR Oklahoma Chapter, the Southern Region and the national association.

Frances A.A. Killen of Louisiana Community and Technical College System; **Kim Finne** of University of Arkansas for Medical Sciences; **Daisha Gaines** of Central Carolina Community College; and **Jessica Wilson** of Oklahoma City University received the **Meritorious Service Award**, which recognizes individuals who have made significant contributions to the profession, their institutions and CUPA-HR chapters.

Western Region
Nancy Nelson, who recently retired from El Paso Community College, received the **Regional Lifetime Membership Award** for her contributions and service to the CUPA-HR Western Region and her institution over several years.

Chrissy Harrison of University of Colorado Boulder received the **HR Excellence Award** for her role in CU Boulder's onboarding initiatives.

Kenny Nelson of University of Colorado Boulder received the **Emerging Leader Award**, which recognizes an HR professional who is a positive role model or mentor and who has made significant contributions to the profession, his/her campus and/or CUPA-HR.

CUPA-HR
Annual Conference
and Expo 2017
September 16-18
San Diego

It's Time to Register for the CUPA-HR Annual Conference

Connect with 1,000 of your HR peers from across the country and explore higher ed topics such as performance management, talent planning, the hiring process and campus climate issues. Plus, get the latest updates on regulatory and legislative initiatives impacting your workplace.

Inspirational Keynotes

Kai Kight, a classical violinist turned composer and storyteller, uses music as a metaphor to inspire those listening to compose paths of personal fulfillment. Kight will present a memorable session on how to become more innovative in the workplace and in life.

Chip Heath is a *New York Times* bestselling author and professor at Stanford Graduate School of Business, focusing on business strategy and organizational development. Heath will deliver an impactful session based on this latest book: *Decisive: How to Make Better Decisions in Life and Work.*

Register Now! | www.cupahr.org/annual2017

⟨cupa·hr⟩ Featured Events

june

1 Eastern Pennsylvania/Delaware Chapter Meeting – New Castle, Delaware

1 Wisconsin Chapter Meeting – Milwaukee, Wisconsin

2 Maryland Chapter Meeting – Rockville, Maryland

11-13 Florida Chapter Conference – Sarasota, Florida

15 Minnesota Chapter Conference – Brooklyn Park, Minnesota

15-16 Southern California Chapter Meeting – San Marcos, California

16 Northern and Central California Chapter Meeting – San Rafael, California

july

13-15 CUPA-HR Association Leadership Program – Tempe, Arizona

28 Washington Chapter Conference – Seattle, Washington

august

23 Webinar – Delivering Engaging, Informative and Impactful Sexual Harassment Training

*We're constantly adding to our calendar of events – chapter meetings, region conferences, just-in-time webinars, virtual workshops and more. Visit **www.cupahr.org/events/calendar.aspx** for a full listing.*

WHEN YOUR EMPLOYEES RETIRE,

THEY MIGHT NOT NOTICE.

Discover how we can work together to help your employees replace over 90% of their income in retirement.

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BUILT TO PERFORM.

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