



Fall 2011 Conference – OHSU Center for Health and Wellness

“Annual HR Checkup!”

Morning Program

8:30-9:00 Registration

9:00-9:30 Welcome from Oregon Health Science University and Announcements (Room 4)

9:30-10:30 Keynote: “The Aging Workforce—A Challenge or an Opportunity?”– Mimi Henniger, SPHR (Room 4)

A healthy conversation built around the aging workforce. Discussion begins with the question of “Why focus on aging workers?” Supervision and performance management challenges for an aging workforce, creative ideas to attract and retain older workers and building bridges between the generations will also be topics of conversation as well as what younger workers can learn from older workers, how to encourage respect and diversity and avoiding stereotypes.

10:30-10:40 Morning Break

10:40-11:45 Morning Breakout Sessions

A: Workplace Health: Ergonomics for the workplace – Chad Harvey (Room 4)

This presentation will be covering ergonomic risk factors; anatomy and physiology; back injury prevention; controls; examples and practical approach to ergonomics; office ergonomics; and objective and subjective recommendations and approaches to ergonomics.

B: Navigating Disability and Reasonable Accommodation – Michael V. Tom, J.D. (Room 5)

This workshop is designed to create more awareness of HR’s legal obligations in regards to Disability and Reasonable Accommodation, including an overview of the Americans with Disabilities Act and Oregon statute – ORS 659A.139. We will identify “hot topics” and “red flags” related to disability and outline the steps necessary to manage reasonable accommodation requests. This will be an interactive workshop incorporating a case study, video examples and strong encouragement of audience participation. DISCLAIMER: Materials and presentation are not legal advice

11:45–1:00 Mid-Day Break

A: Lunch (Room 4) – Please take time to visit and thank our conference sponsors.

B: Mini Wellness Fair (Room 5)

- Diabetes screening, education and counseling –Compliments of the Harold Schnitzer Diabetes Center: Kari Kohrs & 2 Senior Nursing students: Claire Richards & Kristin Belford
- Diet analysis and Anti-Inflammatory cookbook recipe samples – Compliments of the Oregon Clinical & Translational Research: Kate Haas & Angela Horgan
- Vision screening – Compliments of the Casey Eye Institute: Allison Bock
- Blood pressure and tinnitus scale (measures body fat %) – Compliments of March Wellness: Carl Davison
- March Wellness Massage Therapists (rooms 2&3) – 1min. massages, invitation only – also from March Wellness

1:00-2:00 Featured Presenter: “The Healthy Team Healthy U Program: Bringing Science to Employee Wellness” – Linn Goldberg, M.D., F.A.C.S.M. (Room 4)

Eating a healthy diet and engaging in regular physical activity reduces risk factors for many illnesses. As a leading health and science university striving for excellence in patient care, education, research and community service, OHSU is bringing its own evidence based health promotion programs to its highly valued employees. Learn more about this program and how you can spearhead your own programs to capture the power of employees working together to improve their health.

2:00-2:10 Afternoon Break



Fall 2011 Conference – OHSU Center for Health and Wellness

“Annual HR Checkup!”

2:10-3:10 Afternoon Breakout Sessions

A: “Financial Health: 403(B) Educational opportunities to share with employees” – John McPherson (Room 1A)

The presentation will focus on the concept of long term asset allocation and what individuals nearing retirement can do to make their portfolios more responsive to short term market volatility! We will discuss "defensive" and income strategies and a newer concept called "Liability Driven Investing", a focused designed for more cautious investors!

The above concepts can easily transfer to younger investors also who are concerned with today's market uncertainty! There will be a complete list of all of the educational presentations currently available from the presenter with details and a copy of presentation workbooks for each attendee!

B: Healthy Compensation: Using CUPA-HR's DataOnDemand Analysis Tools – Suzi Bowen (Room 1B)

A detailed discussion and overview (with instruction) of CUPA-HR's Data on Demand Analysis Tools. This session will start with a DOD overview and restrictions, and move onto demonstrations of such things as:

- How to create a comparison group of schools to compare your institution to, either typing them by name or by setting your own selection criteria
- How to choose which DOD report to run for your compensation analysis and weighted vs. unweighted salary data.
- Demonstration of reports with examples : Multi-position report that shows focus on institutions salary compared to comparison group (average, median, min, and max), ordinal rank report that shows anonymous listing of salaries submitted by each institution by position or discipline by rank, faculty multi-discipline report that shows salaries by discipline and rank for 4-digit CIP codes , faculty 2-digit index report that calculates overall salary, salary by rank and salary by discipline and Two Year College Salaries by Level of Education.

3:10-3:30 Wrap-up, Prizes, and Networking Opportunities (Room 4) – Thank you so much for your attendance today!

Our Annual Sponsor	
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The Aging Workforce – A Challenge or an Opportunity?

Mimi Henninger, SPHR
HR Consulting Division Manager
AmeriBen / IEC Group
October 14, 2011

Objectives

- ▶ Why Focus on Aging Workers
- ▶ Supervision and Performance Management Challenges
- ▶ Balancing Value and Cost
- ▶ Creative Ideas to Attract and Retain Older Workers
- ▶ Building Bridges Between the Generations

Who Me?

How old is old anyway?

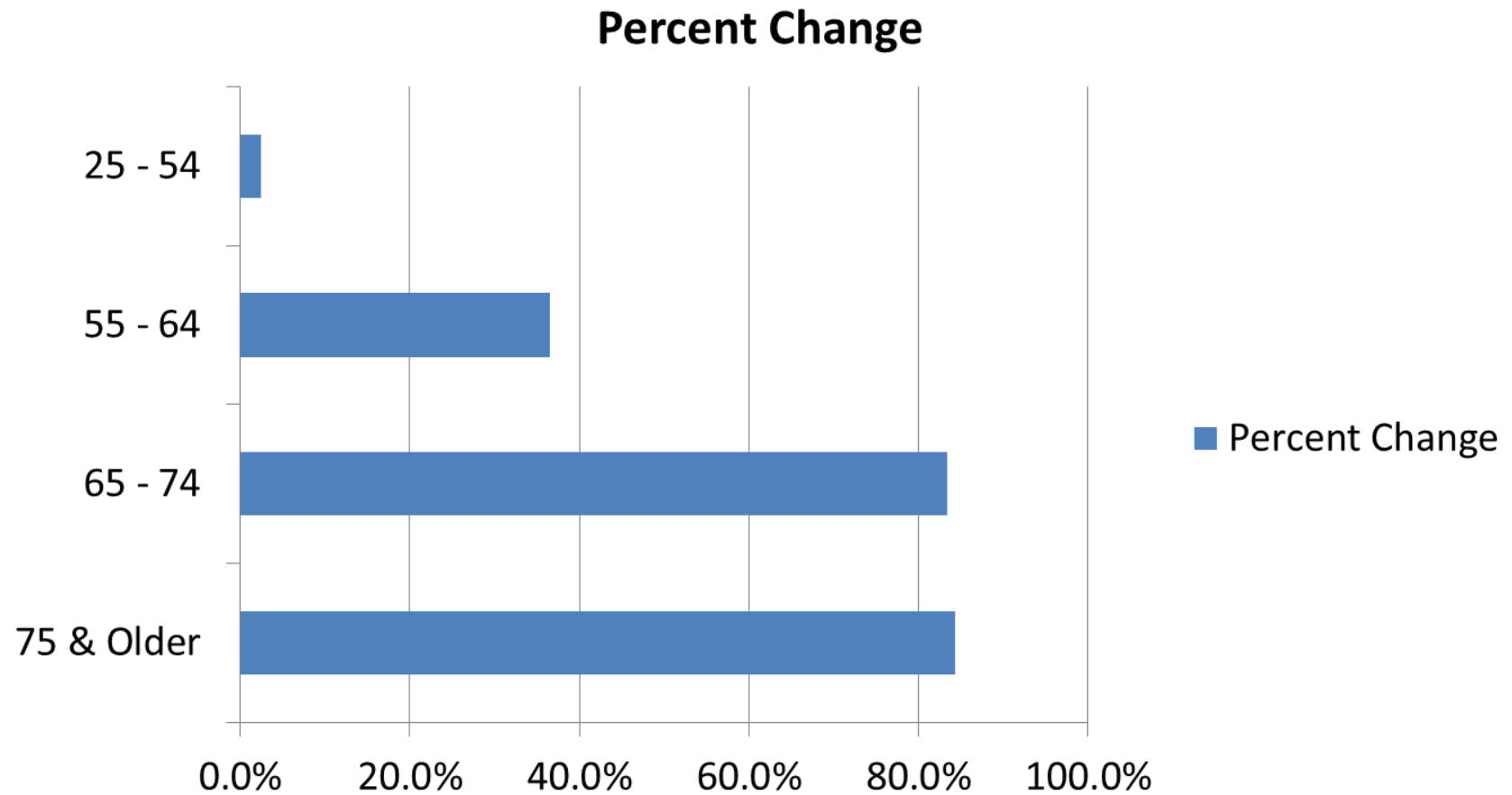


Why Aren't They Golfing?

The notion of retiring at age 65 came in with the Social Security system and employer-based pensions. But full retirement was never what most employees wanted. What older workers want is to keep working in some fashion. They want to change the way they work, but not stop altogether.



BLS Projected Change in Labor Force 2006 - 2016



Maybe They're On To Something...

- ▶ According to Manpower Inc. 13% of US firms said they actively recruited older workers and 20% sought to retain them past the normal retirement age.
- ▶ In Japan, no fewer than 83% of employers sought to retain such workers

SHRM Study Highlights Perceptions

- ▶ 60% of HR managers surveyed said that older workers are more reliable
- ▶ 59% said older workers have a stronger work ethic than younger ones.
- ▶ 49% said that older workers do not keep up with technology
- ▶ 38% said such workers cause health care costs to rise.

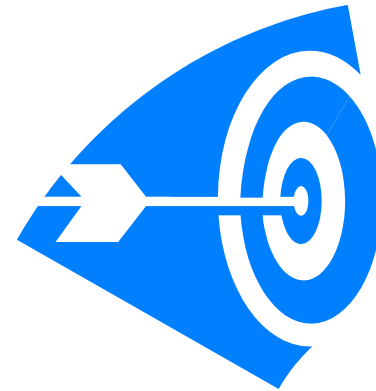
Why Focus on Older Workers?



Engagement

According to Watson Wyatt, organizations with engaged employees:

- Experienced 26% higher employee productivity
- Had lower turnover
- Had lower absenteeism



An Engaged Employee

- ▶ Emphasizes the positive about the organization
- ▶ Volunteers for extra duties
- ▶ Speaks highly of the organization to others
- ▶ Shows interest and concern towards coworkers
- ▶ Is inclusive

Older Workers Are More Engaged

- ▶ According to a recent WorldatWork report, traditionalists (age 63 and older) with between two and five years tenure have an engagement level of 85%—10 percentage points higher than any other generation with comparable tenure.

The Cost of Employee Turnover

33% – 50% of an employee's annual wages

- ▶ Administrative costs for the leaving employee
- ▶ Operational costs for the leaving employee
- ▶ Recruitment costs for the new hire
- ▶ Training costs for the new hire
- ▶ Lost productivity costs for the new hire
- ▶ Administrative costs for the new hire
- ▶ Operational costs for the new hire



Older Workers Are More Loyal

According to the Bureau of Labor Statistics Workers ages 55 to 64 have been with their current employers a median of 9.3 years, while workers ages 25 to 34 have a median tenure of only 2.9 years.

Do Older Workers Use More Health Care?

True or False: Older workers use more health care, which costs companies more money.

Answer: It's not that simple



The Reality

- ▶ Many older workers have coverage already from programs like Medicare.
- ▶ While older workers use more health care, they also have fewer covered dependents, so total employer costs may not be so different.

Do Older Workers Take More Time Off?

- ▶ **True or False:** Older workers take more time off from work than younger workers
- ▶ **Answer:** False



The Reality

- ▶ Workers age 20 – 24 have the highest absenteeism rate.
- ▶ Workers over age 64 have the lowest absenteeism rate

Skill Shortages

As the 76 million baby boomers begin to retire, the stage is set for an acute labor shortage. As the pool of qualified workers dwindles and the race for talent intensifies, employers may come to perceive older workers' loyalty as an irreplaceable asset.

Brain Drain

Retaining older workers, even part-time, gives them the opportunity to teach younger workers what they know.

Mentoring and action-learning teams are techniques that have helped some organizations succeed in transferring knowledge.

Things Have Changed

The new retirement for people 60+ won't involve withdrawing from working life. Instead, older workers want to find a new life balance that includes some form of employment.



Supervision & Performance Management



Generational Differences

- ▶ Traditionalists
- ▶ Baby Boomers
- ▶ Gen X-ers
- ▶ Gen Y / Millennials



What Is A Generation?

A society-wide peer group, born over approximately 20 years, who collectively possess a common persona.



Generations Are Shaped By:

- ▶ History and events
- ▶ Technological Advances
- ▶ Social changes, economic conditions, popular culture



Traditionalists

Loyal to a fault, *Traditionalists* expected to build a lifetime career with one employer, or at least in a single field, and to make a lasting contribution.

Support me in shifting the balance

Baby Boomers

Listening to the tick of the career clock, ***Baby Boomers*** find themselves questioning where they've been and where they're going. Yet the idea of having a stellar career is still utmost in the minds of many.

Help me balance everyone else and find meaning myself

Gen-X

Intent on looking for career security rather than job security, ***GenXers*** believe it is critical to build a repertoire of skills and experiences they can take with them if they need to.

Give me balance now, not when I'm sixty-five

Gen-Y or Millennials

Millennials, who are just beginning to enter the workforce, have grown up multi-tasking, and believe that they will be able to pursue more than one line of work at the same time.

Work isn't everything; flexibility to balance my activities is

Table Talk

How have communications changed from the Traditionalist Generation to now?

Where do you see the most conflict between the different generations at work?

Points of Friction

- ▶ Fun at Work
- ▶ Meetings
- ▶ Policies
- ▶ Dress Code
- ▶ Respect
- ▶ Decision Making

Bias

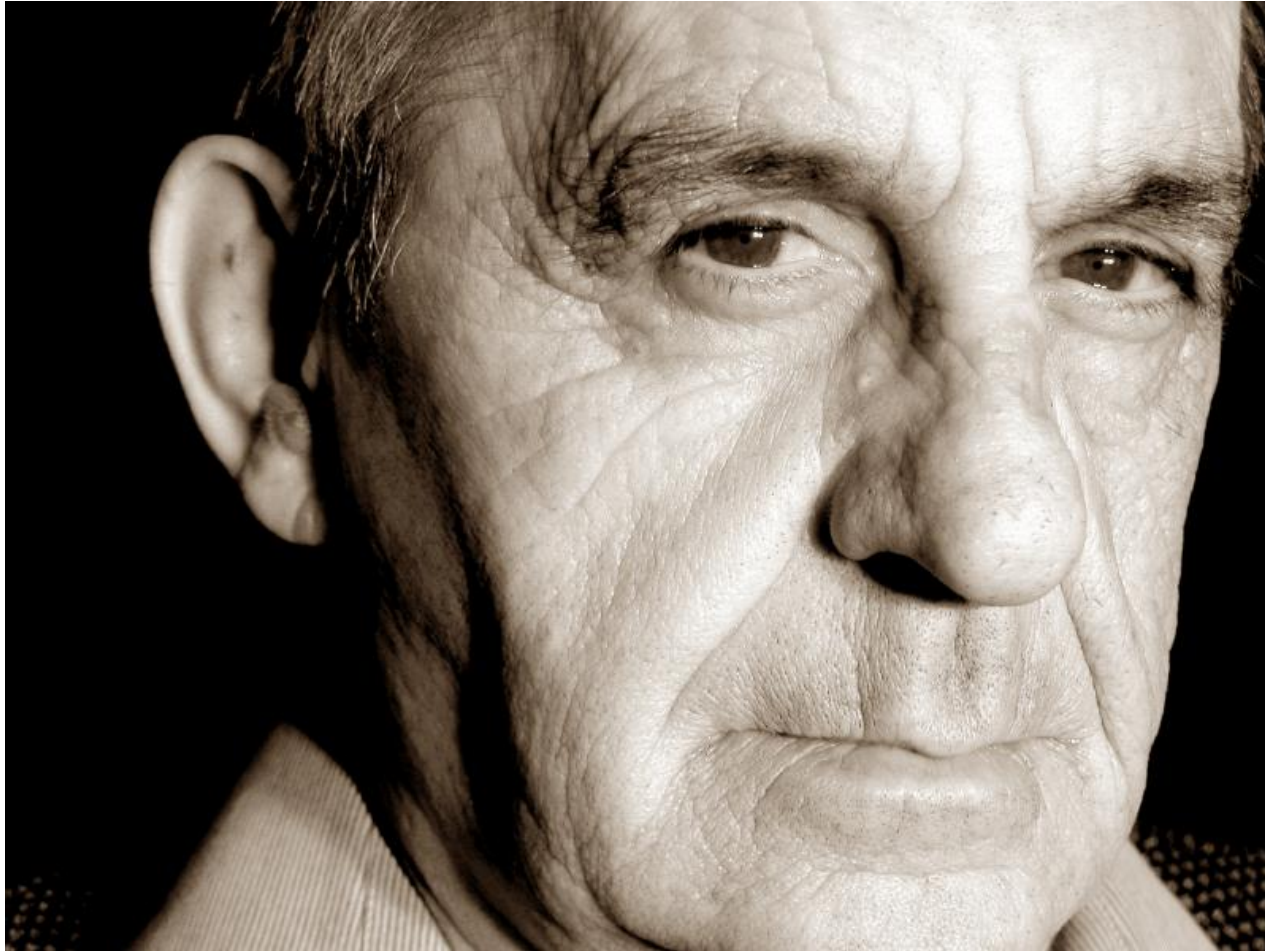
Wanted: somebody who can hit the ground running, who knows how to handle work-based problems, who is not interested in a long-term commitment from the company, and who is self-motivated and self-managing. (But not too old!)

Discussion

Why do younger supervisors unconsciously discriminate against the older worker and what can you do about it?



Feedback & Performance Management



Communicate, Communicate, Communicate

- ▶ Be clear about your expectations with respect to participation.
- ▶ Ask for feedback on a regular basis, and when you use a worker's suggestion, make certain you attribute it to the employee.
- ▶ Model an open, contribution-based environment.

Promote and Support Continuous Learning

- ▶ Build on the natural desire to have continuing challenges. Use job rotation and Cross training to strengthen your skill base and enrich employees' jobs.
- ▶ Insist that ALL employees become technologically literate. Don't allow some workers to "opt out" of learning new software or technology.
- ▶ Require all workers to participate in new and upgrading skill training.

Be Flexible

Changing hours of employment may be key in retention. Consider:

- ▶ Flex-time
- ▶ Part-Time
- ▶ Part Year or Seasonal
- ▶ Telecommuting
- ▶ Phased Retirement
- ▶ Contract Consulting

Re-examine Total Compensation

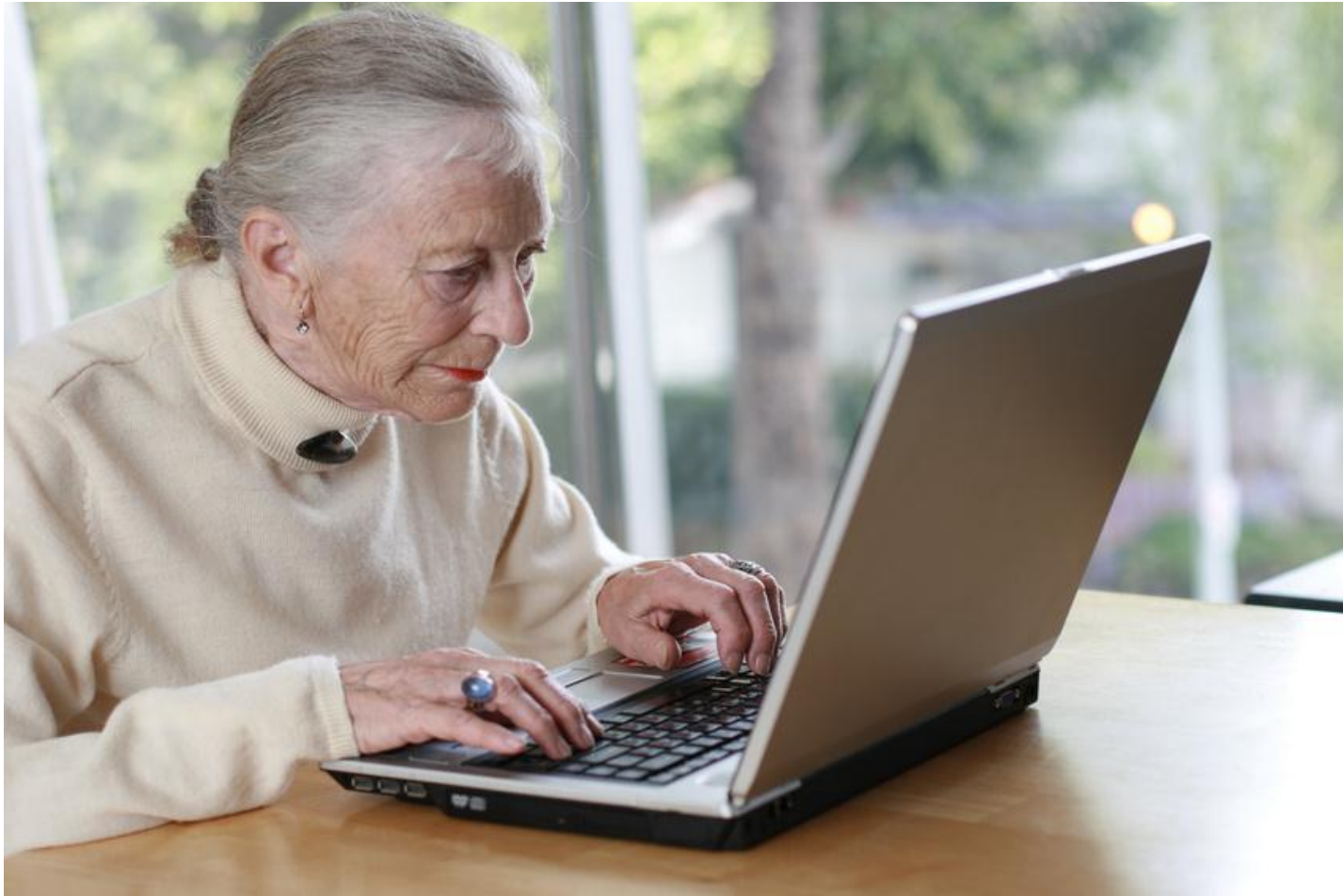
- ▶ Benefits may be more important to older workers than younger workers.
- ▶ Identify what is truly important to your employees.



Handle Conflicts Openly

- ▶ Recognize that older workers were not raised in a corporate environment that promoted openness or confrontation.
- ▶ Conflict stimulates creativity and better solutions in problem solving. Older workers need to understand that some conflict is positive and should not be suppressed.
- ▶ Older workers may need a reorientation about the role of conflict in the organization.

PLACES TO START



Feedback is essential

- ▶ Recognize the contributions of your aging workers.
- ▶ Let all workers know where they stand and what their value to the organization is.



Talk About Choices

- ▶ Let your older employees know that you are willing to discuss job/career changes within your organization, but be clear that they need to be responsible for initiating/directing these discussions.



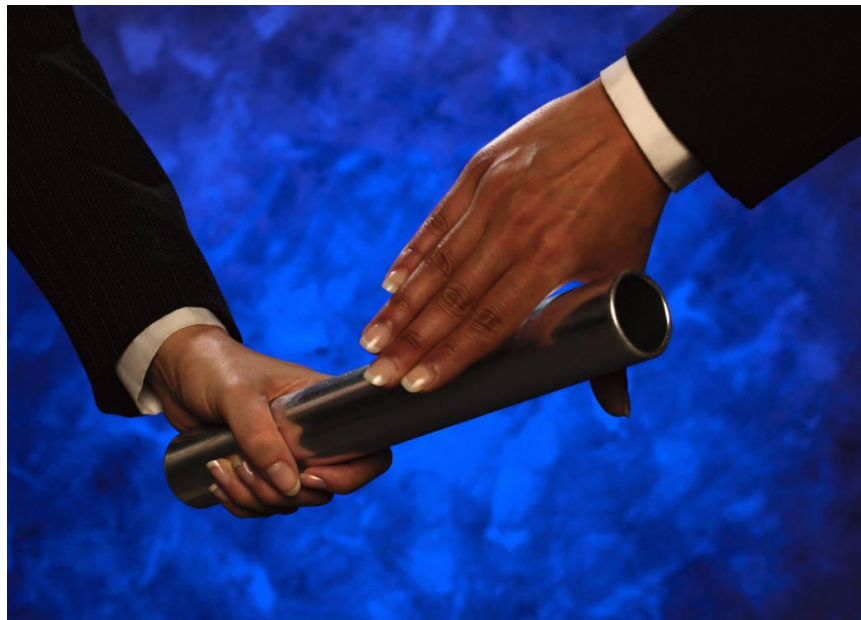
Learning is Key

- ▶ Push a learning environment where all employees are expected to contribute creatively and productively.
- ▶ Sidelining an employee or accepting less than full participation sends the wrong message to all employees.



Mentoring

Create mentoring or liaison positions across departments; this could give you a communications/competitive edge.



Finding and Recruiting Older Workers



How Do You Find and Recruit Older Workers?

- ▶ Encourage current employees to work beyond retirement by offering reduced hours.
- ▶ Stay in touch with your already retired workers.
- ▶ Recruit older workers by using employment services targeted at this group, such as SeniorJobBank.org and Workforce50.com
- ▶ Make sure your marketing materials show older people as staff, volunteers, and as recipients of your services.
- ▶ Collaborate with local organizations that work with older people to create customized job fairs.
- ▶ Let your membership know that you are interested in retired workers.

Are You Ready for the Silver Tsunami?

Aging workers are one of your most valuable resources. Designing programs that attract and retain them will give your organization a competitive advantage. Now is the time to start.



Resources

- ▶ Managing the Older Worker: How to Prepare for the New Organizational Order by Peter Cappelli
- ▶ The Older Worker Advantage: Making the Most of Our Aging Workforce by Gordon F. Shea and Adolf Haasen
- ▶ www.seniorjobbank.org
- ▶ www.workforce50.com

Thank You!



Mimi Henninger

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Navigating Disability and Reasonable Accommodation

**Presenter: Michael Tom, J.D., Interim Director
Affirmative Action & Equal Opportunity Department
October 14, 2011**

Objectives

- Create more awareness of your legal obligations
- Identify “hot topics” and “red flags”
- Understand steps necessary to manage reasonable accommodation requests
- Know when to go to get assistance
- **DISCLAIMER:** Materials and presentation are not legal advice

- Accommodation examples

Disability and Accommodation - Before



Disability and Accommodation - After



Disability and Accommodation - Before



Disability and Accommodation - After



Disability and Accommodations

- Individuals with disabilities are protected under federal, state, and local law as well as any employer policy.

Disability Protections

- Americans with Disabilities Act
- Oregon statute – ORS 659A.139

Prohibits discrimination on the basis of disability or perceived disability. Requires employer to accommodate a known disability of an employee or applicant.

Discrimination & Harassment

Protected Class:

Civil rights and other statutes and regulations protect individuals from discrimination (including harassment) and retaliation on the basis of their membership in a protected class.

Discrimination cont.

- Illegal when decision is based on a category or classification protected by law
- Also be aware of the terms of the employees' collective bargaining contract
- Temporary employees have rights too
- Only rarely can you rely on employment at will, so don't be misled

Harassment

- Harassment on the basis of disability is prohibited
 - Sufficiently severe or pervasive to have the purpose or effect of creating an intimidating, hostile or offensive work environment
 - Submission to conduct is made either explicitly or implicitly a term or condition of employment
 - Submission to or rejection of such conduct is used as the basis for employment decisions affecting that individual

Why managers and HR should care

Managers generally are agents of their employer. Their actions or failure to act can create liability for their employer.

One of your responsibilities as an HR professional or manager is to be aware of these obligations and act accordingly.

Other Protections to Consider-- “The Bermuda Triangle”

- **FMLA/OFLA and Workers’ Comp.**
 - Includes applying for leave (even if not granted)
 - Includes inquiring about leave
 - Includes employee injured or claiming to have been injured on the job

Disability Is...

- Physical or mental impairment (“actual disability”) that substantially limits one or more major life activities; or
 - A record of such impairment; or
 - Being regarded as having such impairment.
- Some examples: cancer, epilepsy, major depression, diabetes, autism
- Some exclusions: temporary conditions, illegal drug use, pyromania

Protected Individual with a disability

- Qualified for the position (skills, education, experience, etc.)
- Can perform essential functions of position
- With or without reasonable accommodation

Key Terms

Substantially limited: unable to perform or is significantly restricted in the ability to perform major life activities compared to average person in general population.

Major life activities, examples: caring for oneself, seeing, hearing, eating, learning, reading, concentrating, lifting, bending, walking, standing, reaching, twisting, working (broad range or class of jobs-all clerical or use of computer).

Key Terms, cont.

Essential functions: are fundamental duties of the position or the reason the position exists; limited number of employees is available to carry out the essential function; or function is highly specialized.

Case Study

- Case Study
- Review
- Discuss in small groups
- Report to group

Triggers for reasonable accommodation

- Employee “request”
- Employee illness
- Employee performance issues
- Workers’ compensation claim
- FMLA/OFLA request
- Known off the job injury – long-term condition

Reasonable Accommodations

- May not be the accommodation the employee requests
- Can include equipment, schedule modification, and/or a facilities change
- Can include reassignment to different position if no accommodation possible in current position

Does Not Include:

- Eliminating essential functions
- Lowering production standards
- Providing personal use items: hearing aids, glasses, prosthetic limb, etc.

What is Reasonable?

- Does not cause undue hardship
 - Employer has burden of proving
 - Larger employers expected to make greater efforts
 - Look at organization-wide resources, e.g., the budget for the entire university.

Accommodation Interactive Process

- Employee initiates process with HR or manager
- Can request and require input from care provider
- May require research regarding cost/impact
- Obligation to engage in meaningful process
- Is ongoing – if change in condition, request for change, or accommodation not working, must engage in process
- Document, document, document

Direct Threat

If:

- Individual is a threat to self or others
- Significant risk of substantial harm
- Risk cannot be eliminated through reasonable accommodation
- Objective, medically supportable evidence

Then:

- Accommodation may not be possible
- Work closely with legal counsel



For Managing Disabilities

- Do not ask applicants for medical information
- Contact legal counsel for assistance with questions
- Refer employees with disabilities/medical concerns for reasonable accommodation assessment
- Document referrals
- Do not “diagnose” employees
- Participate and engage in interactive process with employee
- Maintain confidentiality of medical information

Tips, continued . . .

Avoid absolutes:

- “Must perform 100 percent of duties”
- “Completely released”
- “Full release”

Lunch and Reasonable Accommodation



Questions?

- Questions?
- Evaluation forms
 - Please fill out and hand in

Website Resources

- Oregon state government: www.oregon.gov
- Oregon Bureau of Labor and Industries (BOLI):
www.oregon.gov/BOLI
 - BOLI Technical Assistance, (971) 673-0824
- U.S. Department of Labor: www.dol.gov
- Equal Employment Opportunity Commission (EEOC): www.eeoc.gov

Other Resources

- Job Accommodation Network:
<http://askjan.org/>
- Law firms with training seminars
- NWEEO training
- HR Daily Advisor
- EEO Source

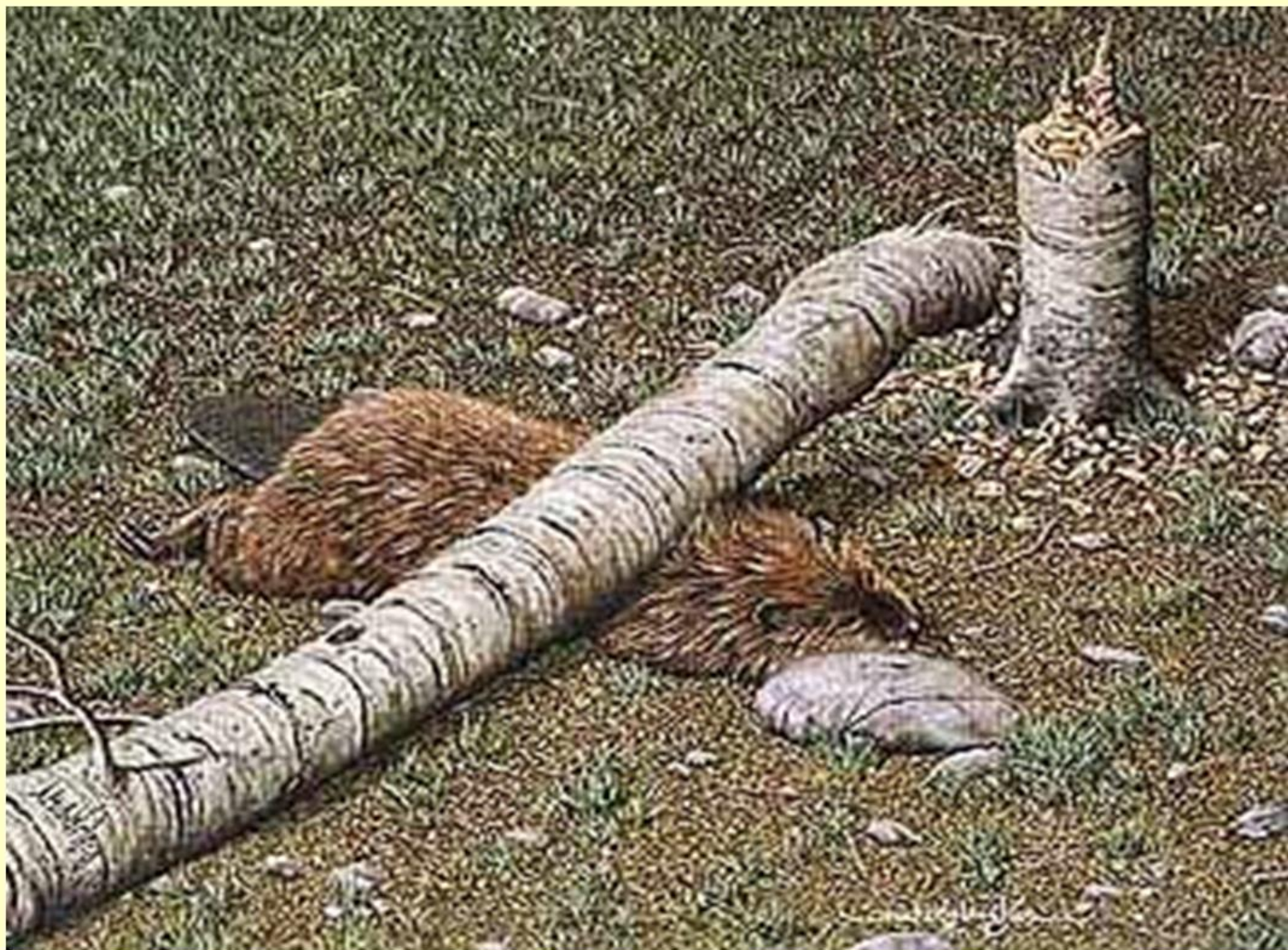
CUPA Presentation

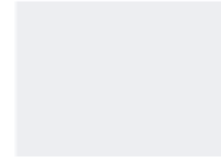
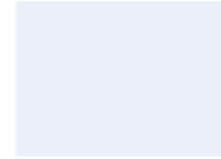
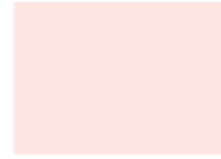
Ergonomics



**Presented by Chad Harvey – Department Manager
Empire Pacific Risk Management**









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- What is Ergonomics
- Risk Factors
- Anatomy and Physiology
- Lifting Zones
- Office Ergonomics

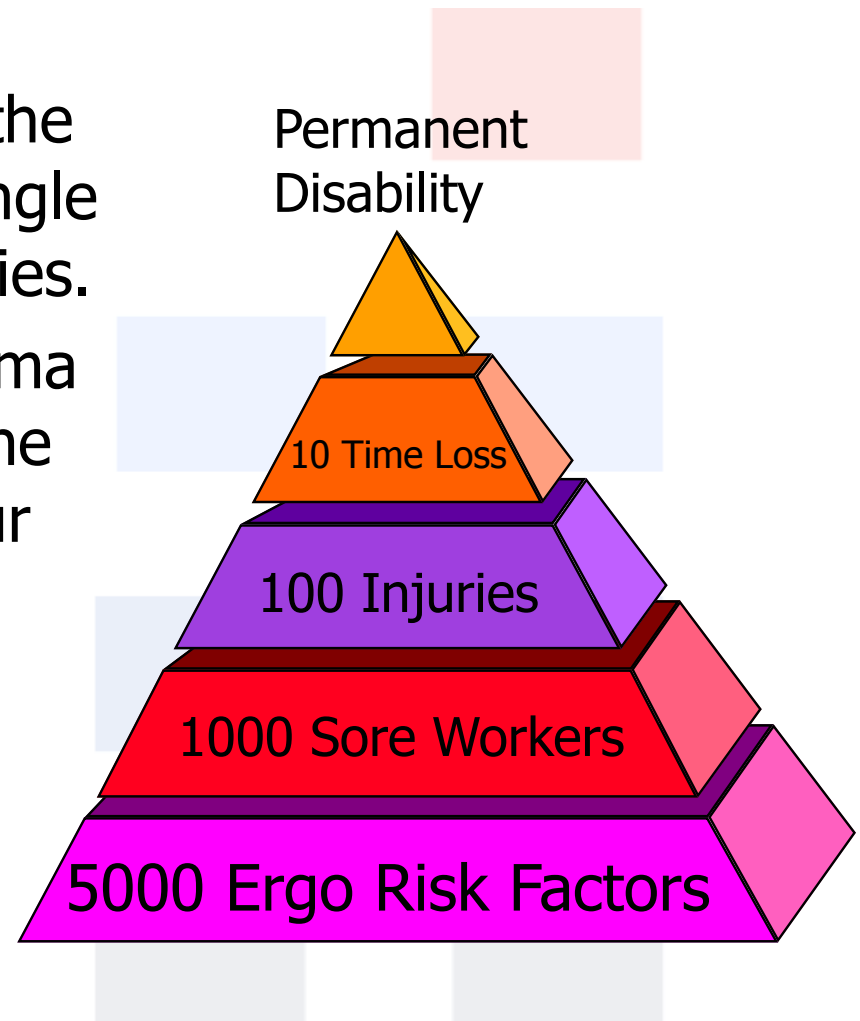
What Is Ergonomics?

- The science of fitting jobs to people.
 - Ergonomics uses knowledge of physical abilities, limitations & human characteristics that apply to job design.



The Accident Triangle for Ergonomic Risk Factors

- Ergonomic risk factors are the bottom of the accident triangle for cumulative trauma injuries.
- To prevent cumulative trauma injuries, you must reduce the number of risk factors in our workplace.



Soft Tissue Injury

- Cumulative trauma, repeated strains and/or tears to:
 - Tendons
 - Ligaments
 - Muscles
 - Nerves
 - Intervertebral disks: the spacers that sit in between the bones of the back, the vertebrae

Ergonomic Risk Factors

- ❧ **Climbing**
- ❧ **Bending**
- ❧ **Crawling**
- ❧ **Reaching**
- ❧ **Repetition**
- ❧ **Vibration**

- ❧ **Twisting**
- ❧ **Exposure to hard and/or abrupt contact points**
- ❧ **Grip size**
- ❧ **Force of grip**
- ❧ **Force/Weight**
- ❧ **Improper body positions**
- ❧ **Heat/Cold**
- ❧ **Lighting**
- ❧ **Stress**

⌚ Risk Factors:

- 1. Repetition**
- 2. Force**
- 3. Grip**
- 4. Deviation/Flexion/Extension**
- 5. Vibration**
- 6. Contact Trauma**
- 7. Heat/Cold**

∞ Solutions:

- 1. Mechanical Advantage**
- 2. Two Person/Assistance**
- 3. Work Practice**
- 4. Material Handling (Distance; layout; frequency; etc.)**
- 5. Behavioral (change)**

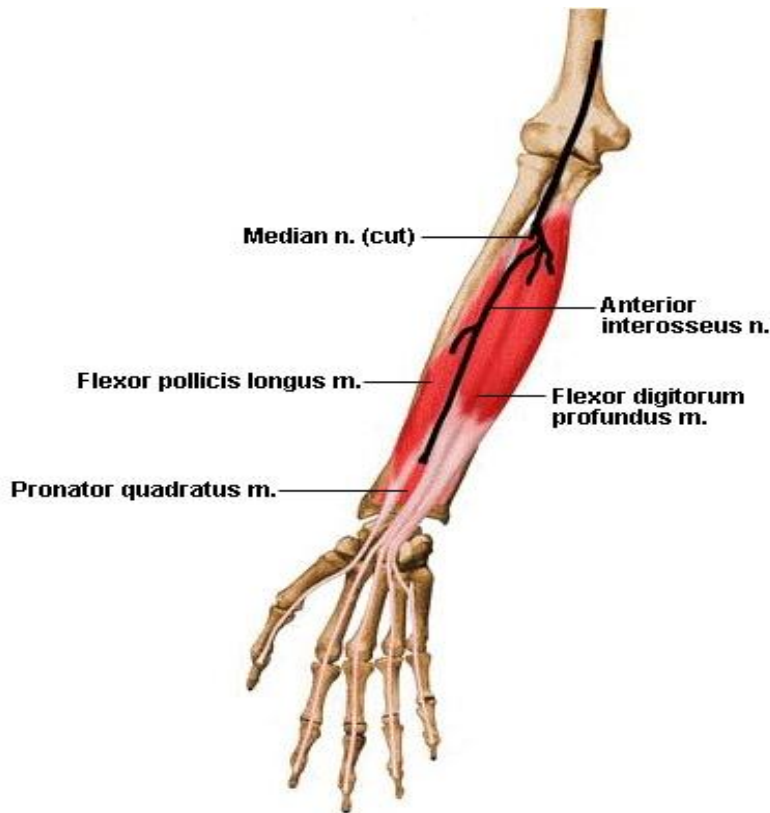
Back Risk Factors

- Distance from body
- Reaching above the shoulder
- Reaching below the knees
- Overexertion – weight
- Twisting
- Non – neutral posture
- Repetition

Shoulder & Neck Risk Factors

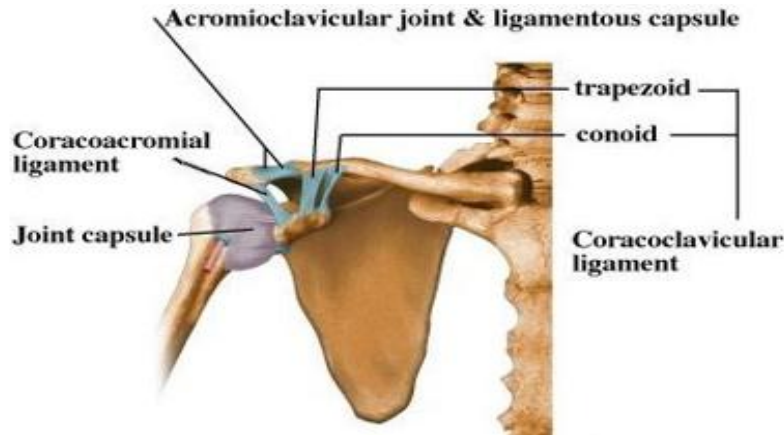
- ⌚ **Above shoulder lifts**
- ⌚ **Repetition**
- ⌚ **Distance from body**
- ⌚ **Static posture - elbows out from body**
- ⌚ **Overexertion – weight**

Tendons



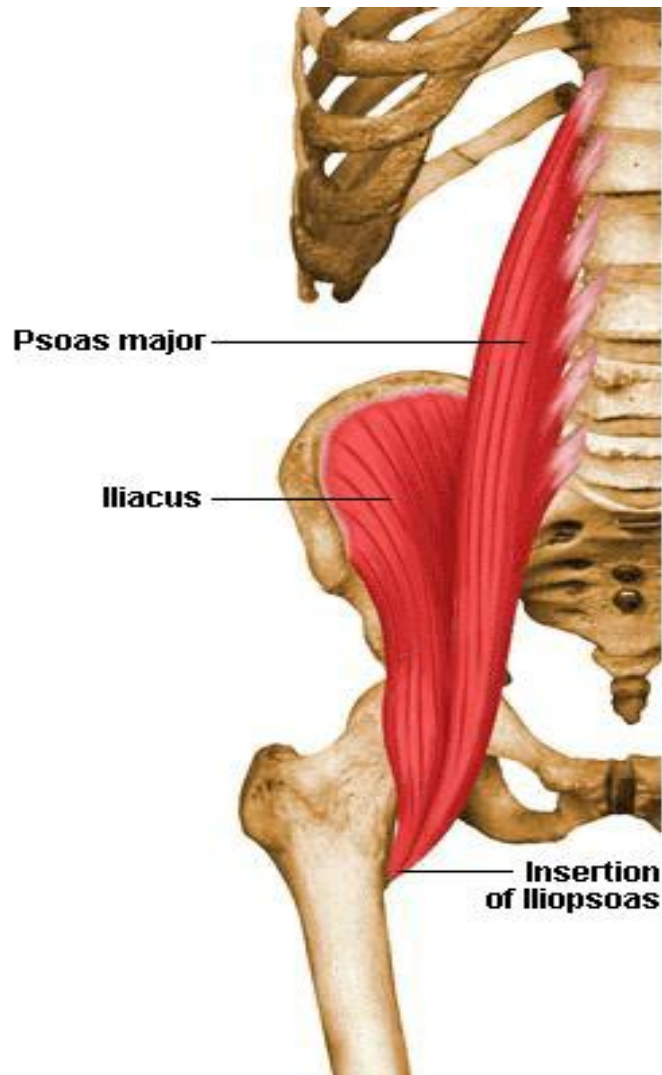
- White tissue that attaches muscle to other tissue/bone
- Tendons have less circulation than muscles or organ tissue, so if injured they have LONG HEALING process
- Injuries are common at the JUNCTION between tendon and muscle

Ligaments



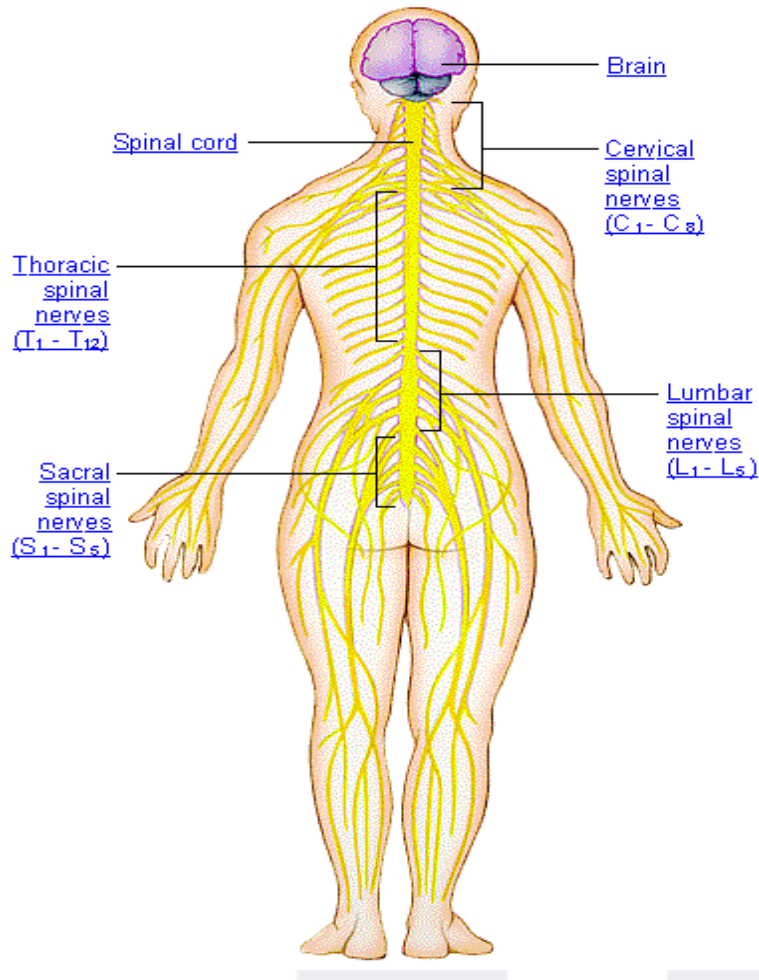
- Attach bone to bone
- This white tissue has little blood supply and high nerve supply
- Injury is immediately felt, but hard to heal from with its low blood supply

Muscles



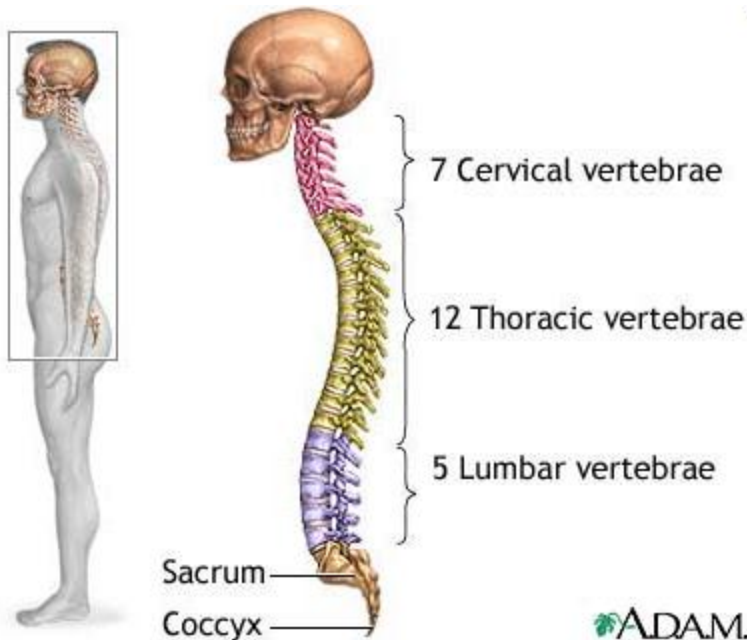
- Muscles move the SKELETON and are the tissues responsible for physiological work
- The cross-sectional size of the muscle indicates its strength
- Increasing muscle strength improves a person's ability for dynamic or static work

Nerves



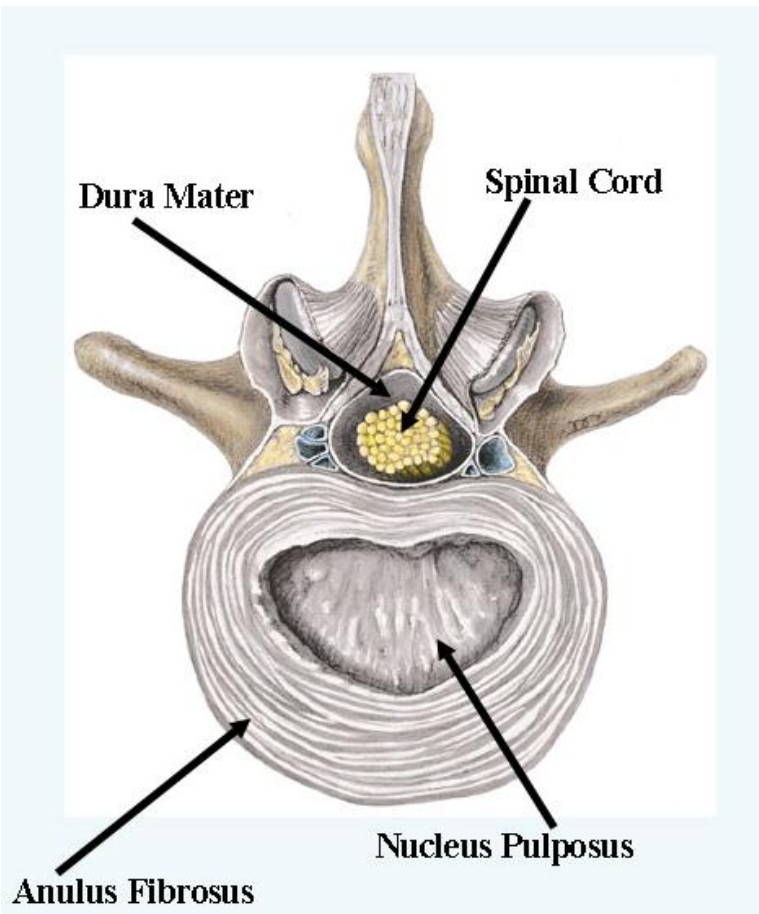
- The brain and spinal cord make up the central nervous system
- It is a multi-level, extremely complex system
- Every part of our body is in constant communication with the other through the ACTIVATION of the central nervous system

Spine



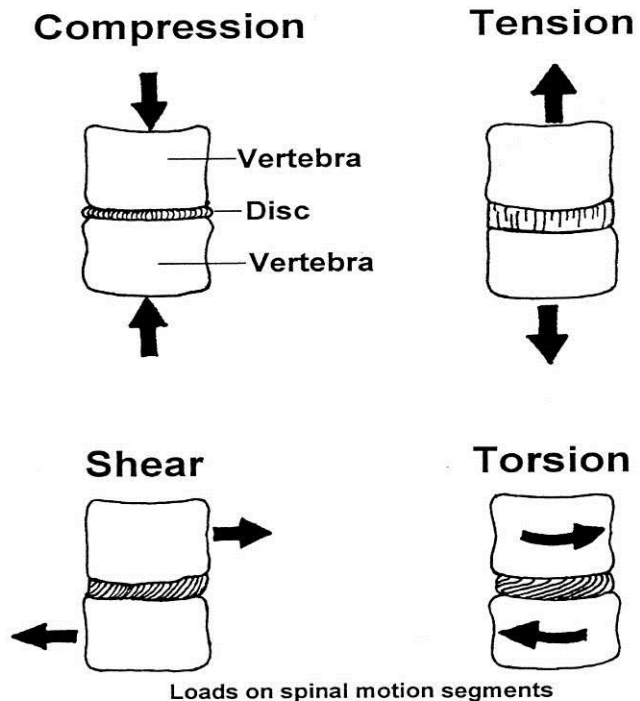
- Made up of vertebrae and depends on supporting muscles for stability
- Three main sections:
 - Cervical (neck)
 - Thoracic (upper back)
 - Lumbar (lower back)
- Where pelvis and sacrum meet is most vulnerable for strain from twisting, bending, or lifting

Vertebrae & Disks



- Discs act like shock absorbers between vertebrae
- Made up of:
 - Outer hard fibrous ring (annulus fibrosus)
 - Inner soft gel-like center (nucleus pulposus)
- Discs are like tires in many ways!

Disk Injury

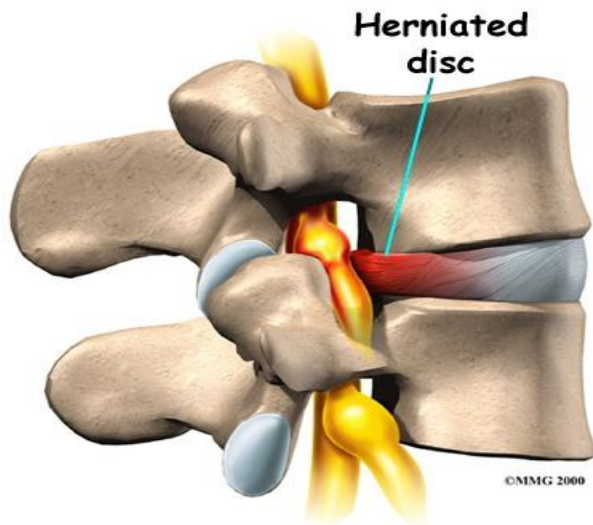


- *Cumulative trauma injuries* can weaken the structures around the disc, leading to disc material escaping
- The result is pain, and it can ultimately lead to nerve damage
- Don't twist while lifting – move your feet!

Disk Injury

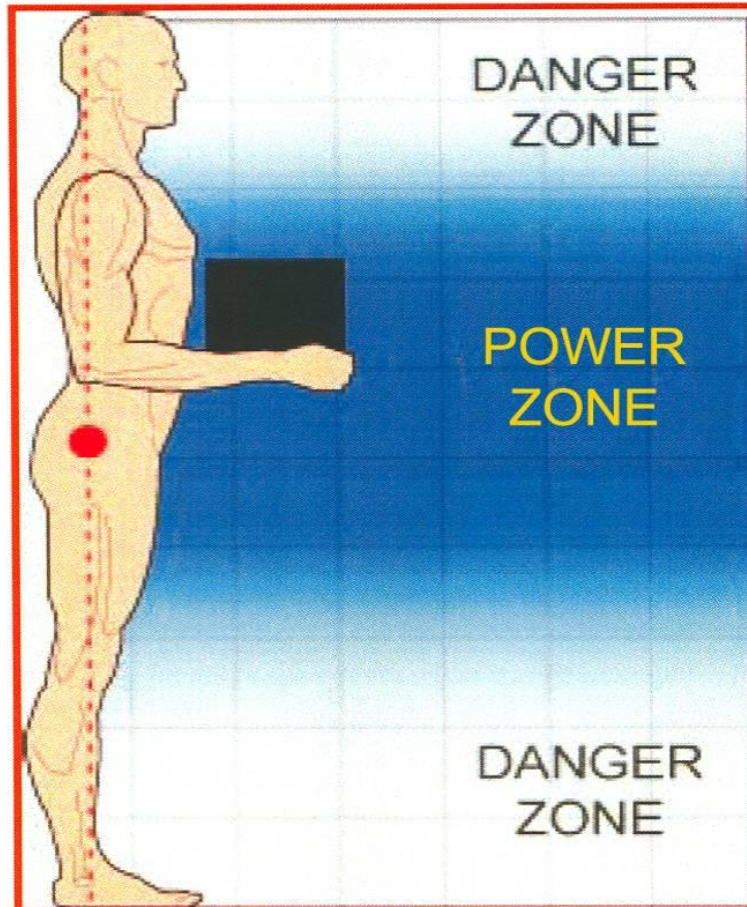


- Herniated discs can occur, causing the disc to bulge (like a tire) and put pressure on the spinal cord



- Pain from a herniated disc can cause referred pain, i.e. muscle weakness, and/or numbness

Power Zone



- Close to the body
- Between mid-thigh and mid-chest height.
- Comparable to the strike zone in baseball,
- This zone is where arms and back can lift the most with the least amount of effort.

- The Green Zone
 - Elbows by your side
 - Pivot point is the elbow
 - Weight is closer to the body
 - provides better leverage
 - requires less force to lift your hands



- The Yellow Zone

- About 6 inches out from your side (about the distance between thumb & little finger)
- The pivot point has moved to the shoulder
- Force on the shoulder can be up to 6 times that of Green Zone



- The Red Zone

- Elbows stretch beyond the 6-inch “string”
- Pivot point changes to the low back
- Force on the low back can be 50:1 in the far red zone



5 Areas of the Red Zone

- Near - Arms straight out
- Far - You are bent at the waist with arms straight out
- High - Over your head
- Low - Below your knees
- Ultra - Behind you (like reaching into the back seat of your car)

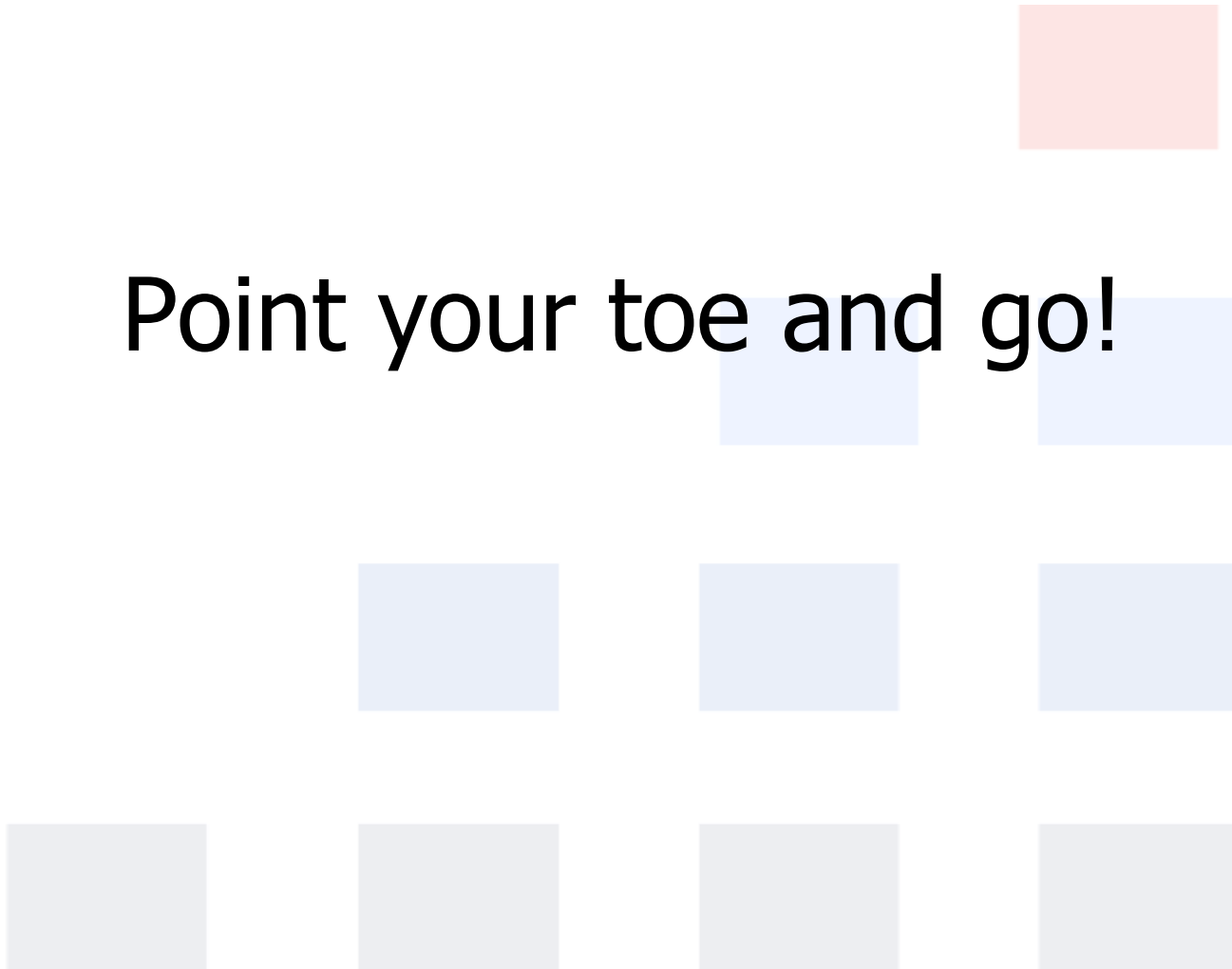
- Whenever possible, set up frequent tasks in your Green Zone
 - Position frequently used tools and equipment in this zone
 - Store heaviest and most frequently used items in this zone
 - Adjust table heights and seats if possible

- When working in the Yellow Zone, use caution.
 - Find ways to get your elbows closer. Just 6 inches closer can cut the force in half.
 - Step closer
 - Slide, tilt, roll or “walk” the load closer
 - Try handling boxes at the corners to get elbows closer (demo)

- When working in the Red Zone, ask yourself: “Is there is a better way to do this?”
- Use all the techniques you use in Yellow Zone.
 - Use mechanical advantages
 - Build a bridge with your free arm
 - Use lifts, carts, ladders, lifting devices
 - Use frequent re-energizers

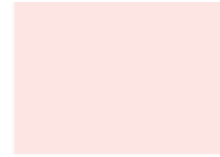
- Twisting the upper body while you lift:
 - increases the force on your low back
 - significantly increases your risk of injury.
- Pivoting on your toe or heel:
 - moves your hips in line with the upper body
 - takes the “twist” out of your move.

Point your toe and go!



The Big Four of Lifting

1. Plan the Lift



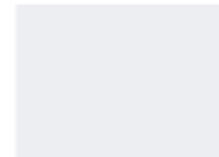
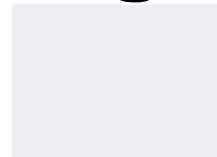
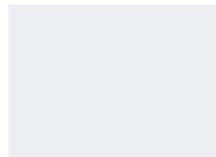
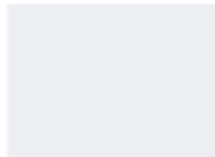
2. Keep the Load Close



3. Bend at the Knees & Use your Legs



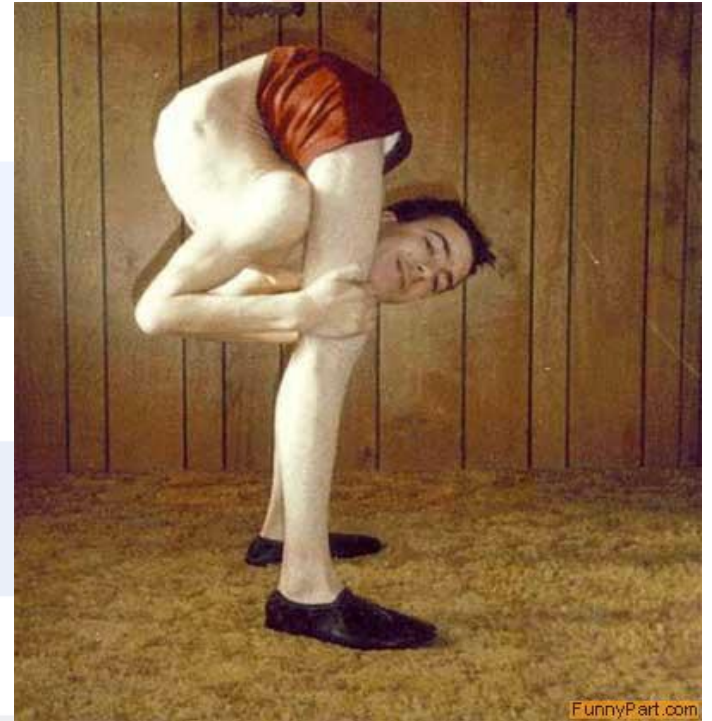
4. Pivot. Avoid Twisting





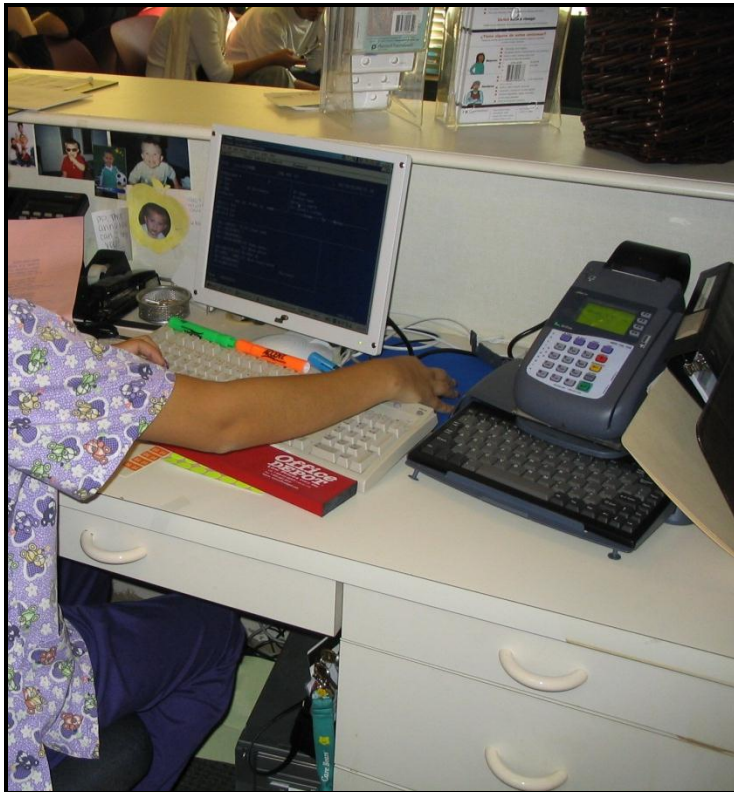
Strength and Flexibility (this is not you)

Know your Limitations



OFFICE ERGONOMICS

Elbow Risk Factors



- Contact points
- Distance from body
- Repetition
- Overexertion – weight
- Grip type
- Static posture

Wrist & Hand Risk Factors

- Force
- Non-neutral posture
- Contact points
- Repetition
- Static posture
- Vibration
- Cold



Glare & Lighting



Computer Workstation Risk Factors



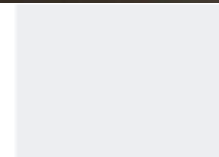
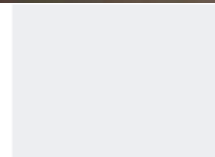
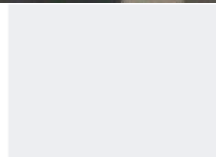
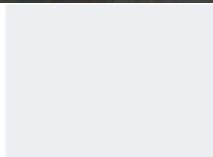
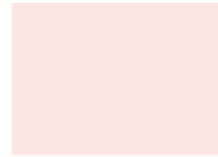
- Wrist flexion
- Wrist extension
- Elbow abduction
- Neck twist/incline
- Back twist/slump
- Static posture
- Repetition
- Non-neutral posture

VDT Workstation Risk Factors



- Contact surfaces
- Glare
- Desk height
- Monitor height
- Keyboard height
- Chair adjustments
- Housekeeping
- Climate

What do you identify here?

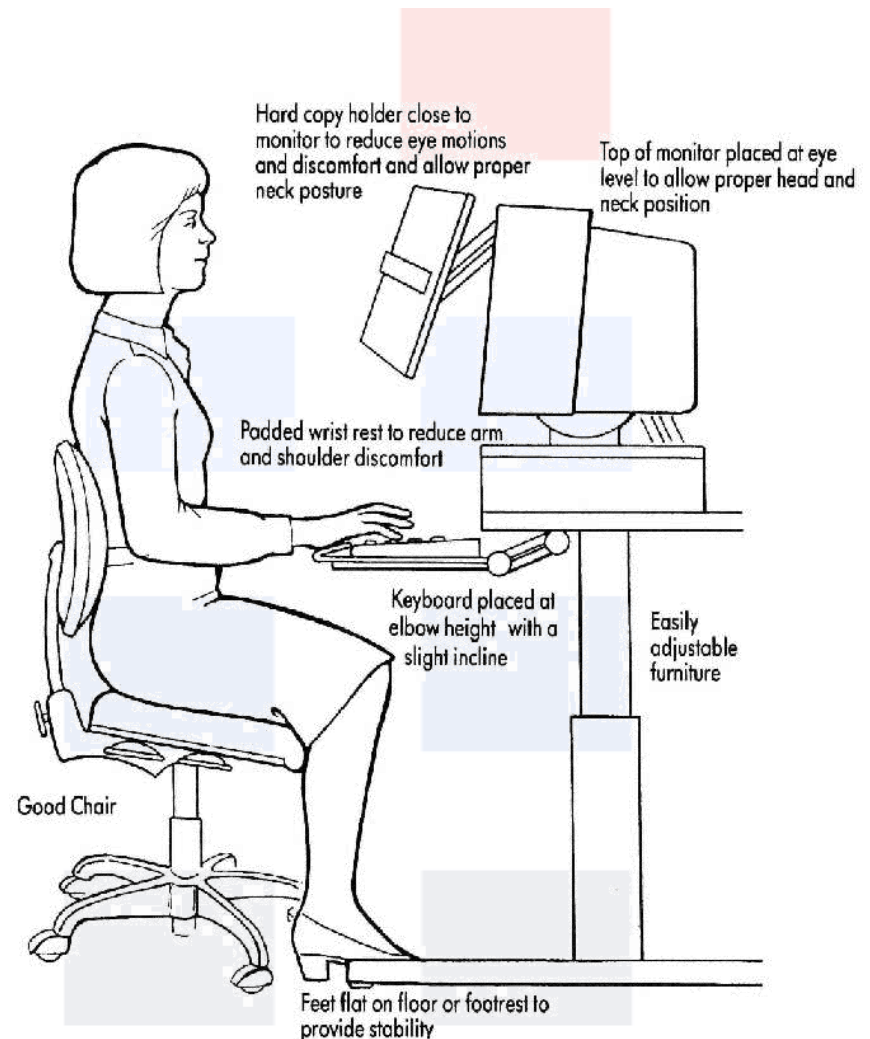


What Do You Identify Here?

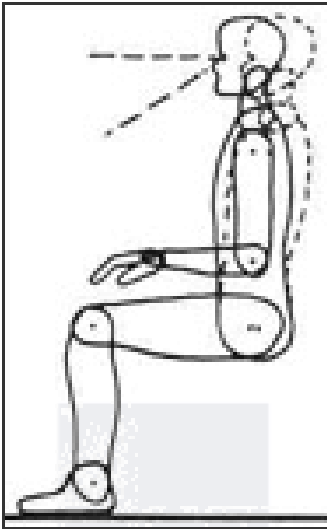


Neutral/ "Home Base"

- 90-105 degrees @ Elbow
- 90-105 degrees @ Knee
- 90-105 degrees @ Ankle
- 90-105 degrees @ Hips
- 180 degrees @ Neck



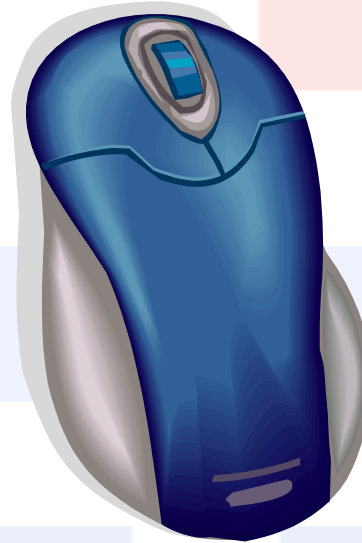
Adjustment Controls



- Desk height
- Keyboard height/angle
- Monitor height/angle
- Chair adjustments
 - Height/tilt/lumbar
- Foot & leg space
- Other

Softeners & Ergo Devices

- Keyboard drawer
- Wrist rest
- Mouse wrist rest
- Alternative mouse
- Lumbar cushion
- Seat pan extender
- Monitor stand
- Document holders
- Task lighting
- Other



Administrative Controls

- Body part rotation
- Employee rotation
- Job task enlargement
- Adjustment of work pace
- Redesign of work methods
- Alternative tasks
- Rest breaks



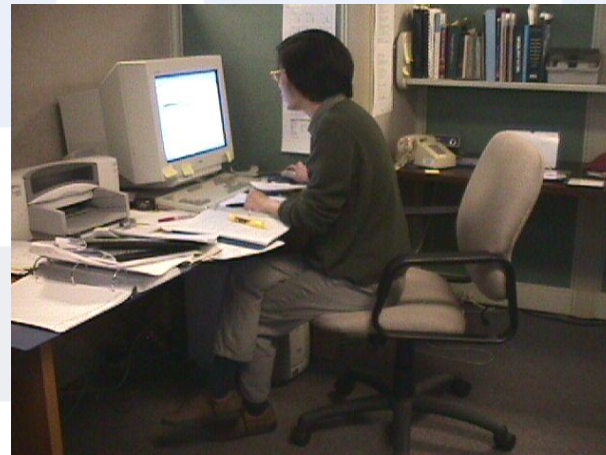
Stretching Exercises...

We do throughout the day



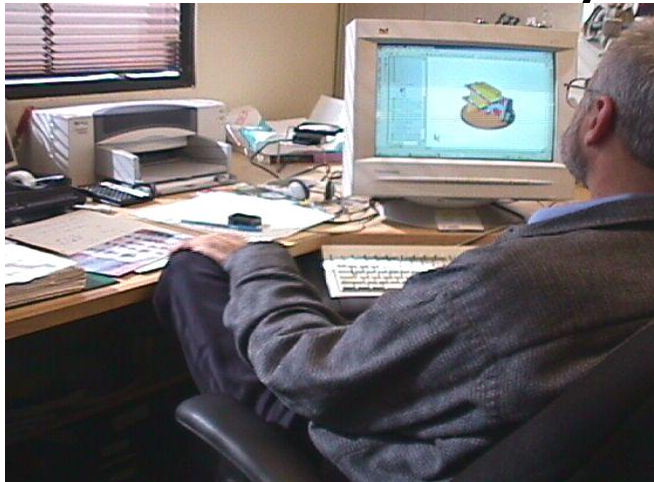
Team Evaluations...

Identify the risk factors



Team Evaluations...

Identify the risk factors





Questions?



WELCOME

Planning for Financial Security Financial
Financial Wellness in Turbulent Times

SAVING : INVESTING : PLANNING

VALIC

It's not what you make, it's
what you keep...

Steps to Financial Wellness In Times of Market Turmoil

1. Financial management. Back to basics.
2. Retirement in the NEW Economic Realities.
3. Investing Today.
4. Next steps and resources to help.

1

Budgeting

Cash management process

- 1 Establish a budget

- 2 Determine fixed and variable expenses

- 3 Reduce expenses and put savings to work for you

Establish a budget

The basics:

- > Assess your current situation
- > Look for ways to reduce expenses
- > Look for ways to reduce debt
- > Build in a savings component
- > Monitor on a monthly basis

Budgeting worksheet

Category	Monthly Expense	Annual Expense	Year(s) Beginning & End
Federal income taxes			
State income taxes			
Real estate taxes			
Municipal taxes			
Life insurance premiums			
Mortgage pmts./Rental pmts.			
Homeowners association dues			
Auto loans			
Auto lease pmts.			
Home insurance			
Auto insurance			
Medical/LTC insurance			
Property maintenance			
Utilities			
Cable/Internet			
Trash			
Water			
Energy			
Gas			
Telephone/Internet			
Landscaping			
Other debt service			
Food: groceries			
Food: dining out			
Auto: gas			
Auto: maintenance			
Clothing			
Charitable contributions			
Prescription drugs			
Other installment loans			
Medical/dental expenses			
Other expenses			
Other expenses			
Total basic living expenses			

Category	Monthly Expense	Annual Expense	Year(s) Beginning & End
Federal income taxes			
State income taxes			
Real estate taxes			
Municipal taxes			
Life insurance premiums			
Mortgage pmts./Rental pmts.			
Homeowners association dues			
Auto loans			
Auto lease pmts.			

2

Establish a cash reserve

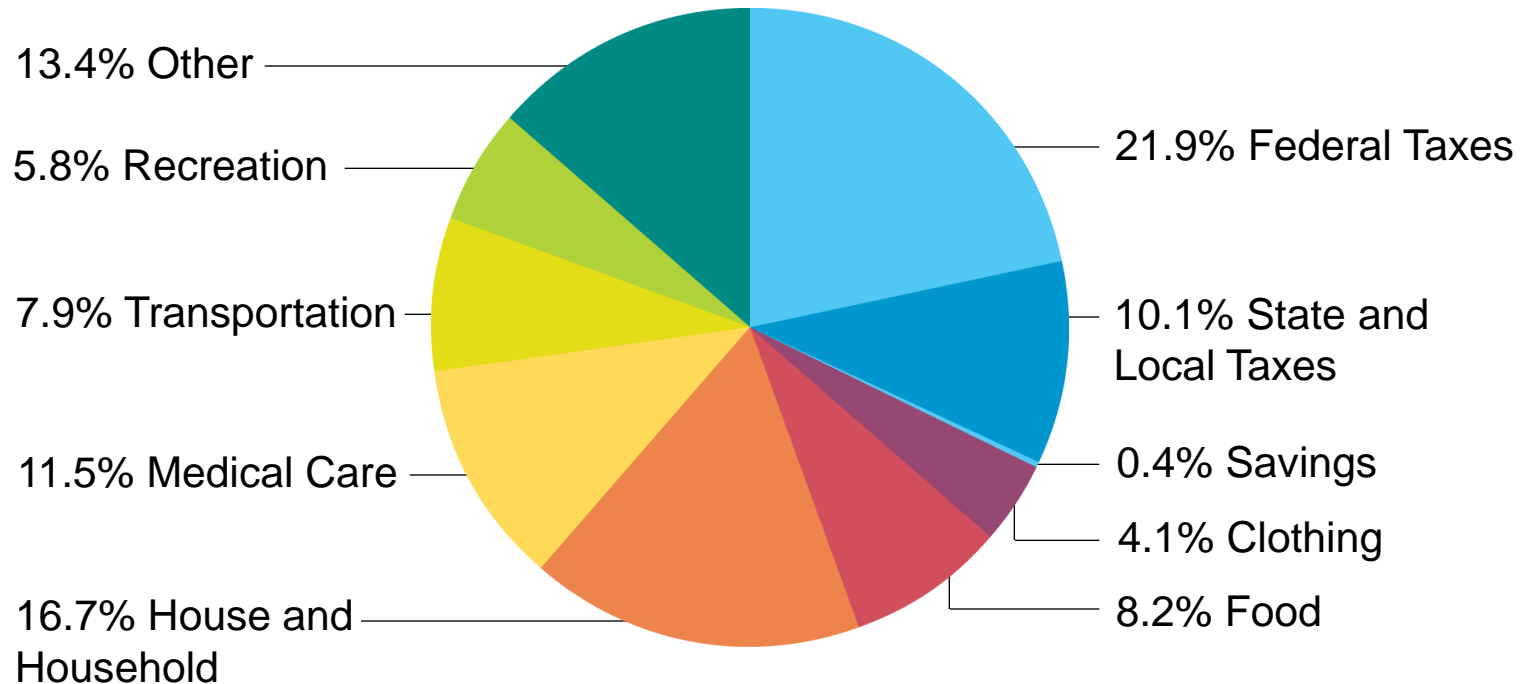
Plan for the unexpected

- > Establish a cash reserve
- > Three to six months of living expenses
- > Consider individual circumstances



3 Spending tips

How we spend our dollars



Source: The Tax Foundation.

Cut back on spending

- > Postpone one big expense this year
- > Find ways to reduce taxes
- > Compare prices before purchasing

BALANCE SHEET

Form: ☐ Business ☐ Consolidated ☒ Personal

	A Beginning Balance	B Ending Balance	C Net Change (B - A)
CURRENT ASSETS			
1. Cash & Checking	6,388	2,000	(4,388)
2. Marketable Securities	2,200	2,375	175
3. Accounts Receivable	0	0	0
4. Prepaid Expenses	0	31,080	31,080
5. Cash Investment, Growing Crops	21,080	22,893	1,813
6. Inventories	120,584	2,980	(117,604)
7. Marketable Livestock	2,810	200	(2,610)
8. Stored Crops and Feed	50	443	393
9. Purchased Feed	181,777	151,307	(30,470)
10. Supplies	22,427	24,566	2,139
11. Other Current Assets	0	0	0
12. TOTAL CURRENT FARM ASSETS	184,204	113,872	(70,332)
13. Non-Farm Current Assets	0	0	0
14. TOTAL CURRENT ASSETS	184,204	113,872	(70,332)
NON-CURRENT ASSETS			
15. Breeding Livestock	53,985	51,575	(2,410)
16. Machinery, Equipment	145,950	119,700	(26,250)
17. Capital Leases	31,000	81,303	50,303
18. Other Non-Farm Assets	0	0	0
19. TOTAL NON-CURRENT ASSETS	130,935	152,578	21,643
20. TOTAL ASSETS	315,139	266,450	(48,689)
21. Liabilities	15,102	3,740	(11,362)
22. TOTAL LIABILITIES	15,102	3,740	(11,362)
23. EQUITY	300,037	262,710	(37,327)
24. TOTAL EQUITY	300,037	262,710	(37,327)
25. TOTAL LIABILITIES & EQUITY	315,139	266,450	(48,689)

4

Reducing debt

Credit card guidelines

- > Avoid unnecessary purchases
- > Pay more than the minimum
- > Transfer balance to a lower interest card
- > Pay off the credit card with the highest interest first



5 Saving tips

Savings tips

- > Pay yourself first
 - Disguise savings as a regular monthly bill
 - Arrange a monthly debit from checking to savings
 - Enroll in your employer's retirement plan
- > Put your money to work for you
- > Distinguish between wants and needs
- > Spend less than you earn
- > Create savings and investment goals



Periodically check your credit report

- > Identity theft
- > Inaccuracies
- > Payment history
- > Inquiries
- > Credit fraud



Credit reporting agencies

Equifax	Experian	Trans Union
1-800-685-1111	1-888-397-3742	1-800-916-8800
www.equifax.com	www.experian.com	www.transunion.com

Financial warning signs

- > No savings
- > Making minimum payments on credit cards
- > Using cash advances on credit cards to pay other bills
- > Using increasing amounts of total income to pay off debts
- > Being at or near your credit limit
- > Not knowing the total amount you owe

Investment planning

How are today's Markets different?

How do YOU avoid trouble?

The need for financial education

Workers are not maintaining a diversified portfolio.

> Year End 2008

- Stock market was down 38%¹ (S&P 500)
- 73% of 401(k) participants made no changes to their asset allocations²

> Year End 2009

- Stock market was up nearly 24%¹ (S&P 500)
- 80% of 401(k) participants made no changes to their asset allocations²

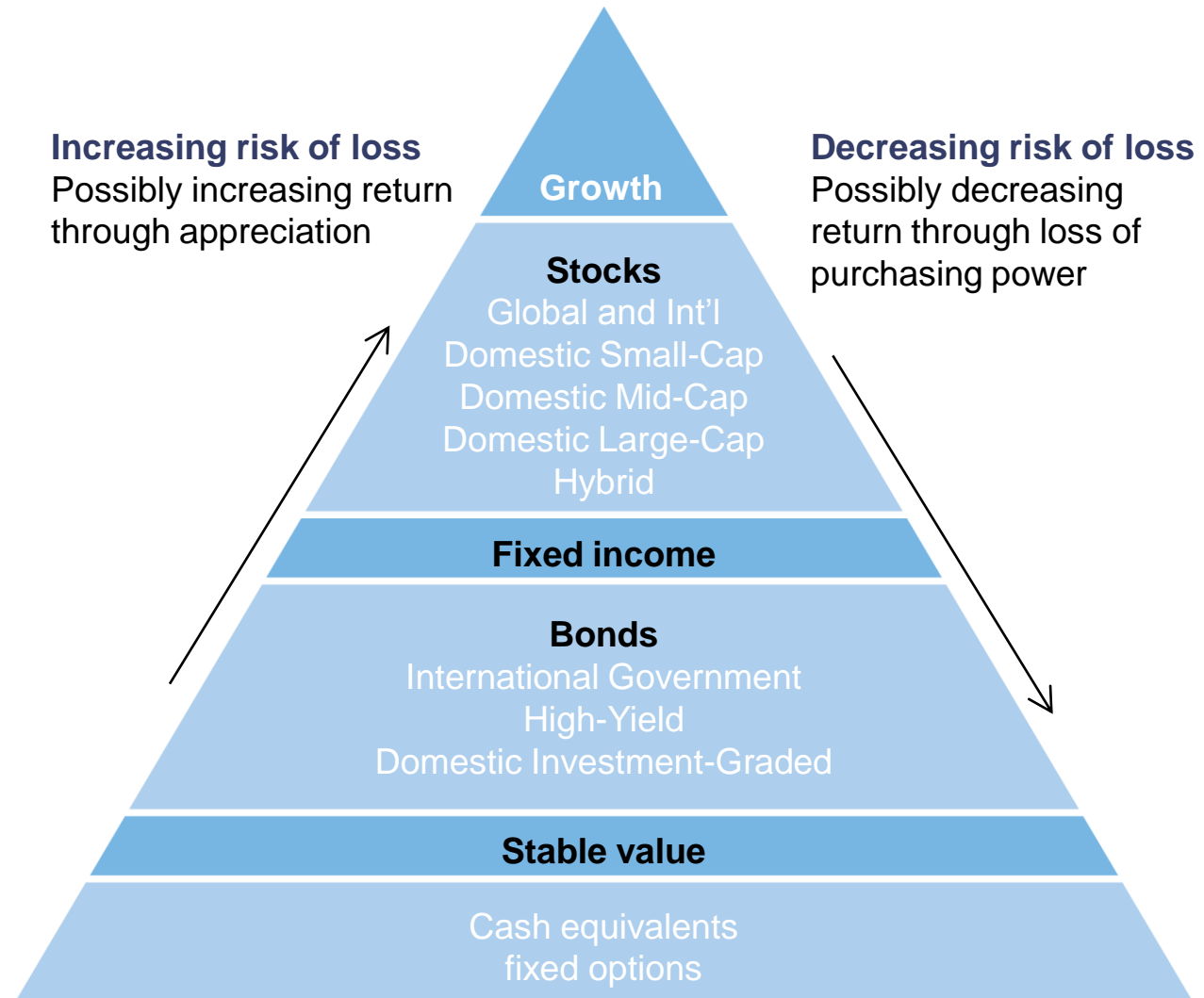
¹ *Wall St. Closes Out '09 with Best Gains Since 2003*. Reuters. December 31, 2009.

² *Enduring Confidence in the 401(k) System*. Investment Company Institute. January 2010.

³ *The 2009 Retirement Confidence Survey: Economy Drives Confidence to Record Lows; Many Looking to Work Longer*. Issue Brief No 328. Executive Summary, EBRI. April 2009.

Asset classes

- > Cash
- > Bonds
- > Stocks



Investment considerations

> Time horizon

> Risk tolerance

Estimate your risk tolerance

By answering these eight questions and adding their point total, you can get a rough estimate of your risk tolerance, which is one criterion in making an investment decision.

1 In how many years do you expect to begin making withdrawals from your investment account(s)?

	Score
Fewer than 5 years	0
5 years	4
10 years	8
15 years	12
more than 15 years	16

2 Once you begin making withdrawals, how many years do you expect to continue making withdrawals?

	Score
Lump-sum payment or full withdrawal over fewer than 5 years	0
5 years	6
10 years	10
15 years	14
more than 15 years	18

3 The graph below shows a one-year range of returns for five hypothetical investment mixes. In which of these mixes would you prefer to invest?

	Score
Sample 1	0
Sample 2	3
Sample 3	6
Sample 4	9
Sample 5	13



4 The five hypothetical samples shown in the table below represent a best-case and a worst-case result for an investment of \$100,000 after one year. Which range of possible results would you prefer?

	Potential best case	Potential worst case
Sample 1	\$115,590	\$94,430
Sample 2	\$121,250	\$91,690
Sample 3	\$133,520	\$84,040
Sample 4	\$139,540	\$80,180
Sample 5	\$151,740	\$72,100

	Score
Sample 1	0
Sample 2	3
Sample 3	6
Sample 4	9
Sample 5	13

5 How would you respond to the following statement? I am comfortable with investments that may frequently experience large declines in value if there is a potential for high returns.

	Score
Strongly disagree	0
Disagree	2
Somewhat agree	4
Agree	7
Strongly agree	10

6 If the value of a hypothetical investment increases by 15% over four months while similar investments increase by 5%, which of these strategies are you most likely to follow?

	Score
Sell the entire investment now to realize the gain and move to a more conservative investment to protect the gain.	0
Sell some of the investment now and move the proceeds to a more conservative investment to lock in a portion of the gain.	4
Continue holding the investment.	9

7 Suppose you invested \$30,000 with the intention of holding the investment for 10 years. If this investment lost value during the first year, at what value of your initial \$30,000 investment would you sell and move to a more stable investment?

	Score
\$28,500	0
\$27,000	2
\$25,500	4
\$24,000 or less	7
I would not sell	10

8 The following table shows the average return and probability of experiencing a loss in five different hypothetical investments over a two-year holding period. Which of the following investments would you prefer?

	Likely return	Odds of loss	Score
Investment 1	5%	9 out of 100	0
Investment 2	6%	11 out of 100	3
Investment 3	9%	17 out of 100	6
Investment 4	10%	19 out of 100	9
Investment 5	12%	22 out of 100	13

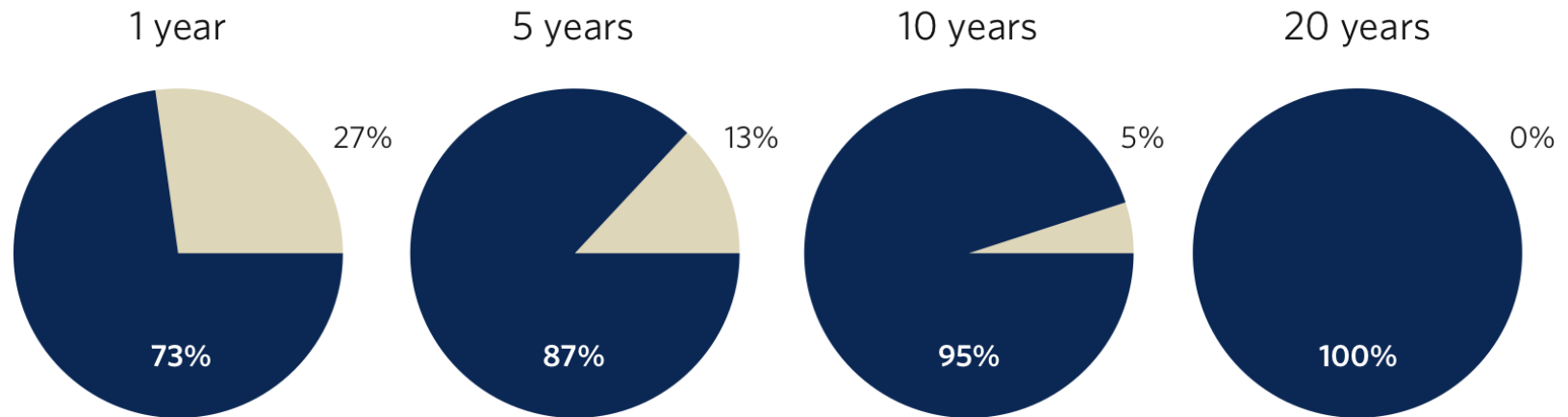
Total score for questions 1 & 2 only: _____

Total score for questions 1 through 8 only: _____

Put time on your side

■ Negative

■ Positive



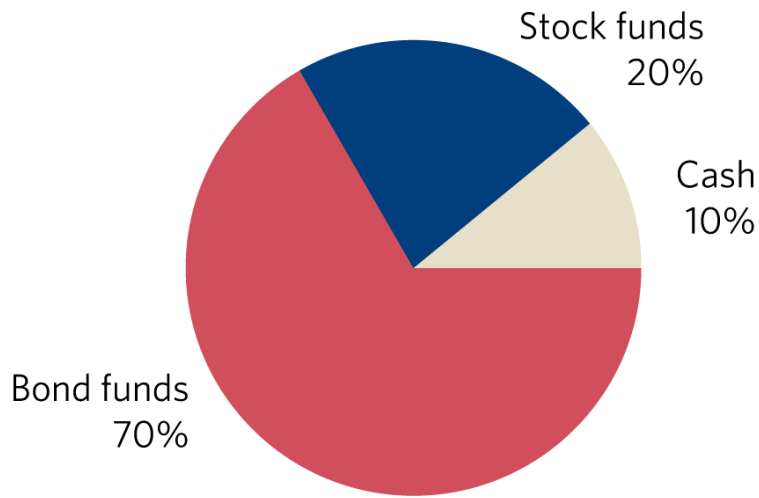
Historical positive returns from stocks as measured by the S&P 500 Index 1-, 5-, 10- and 20-year rolling periods January 1, 1926 – October 31, 2009.

Total return of the unmanaged S&P 500 assumes reinvestment of dividends. This chart is for illustrative purposes only and does not reflect the past or future performance of any specific investment. One cannot invest directly in an index. Past performance does not guarantee future results.

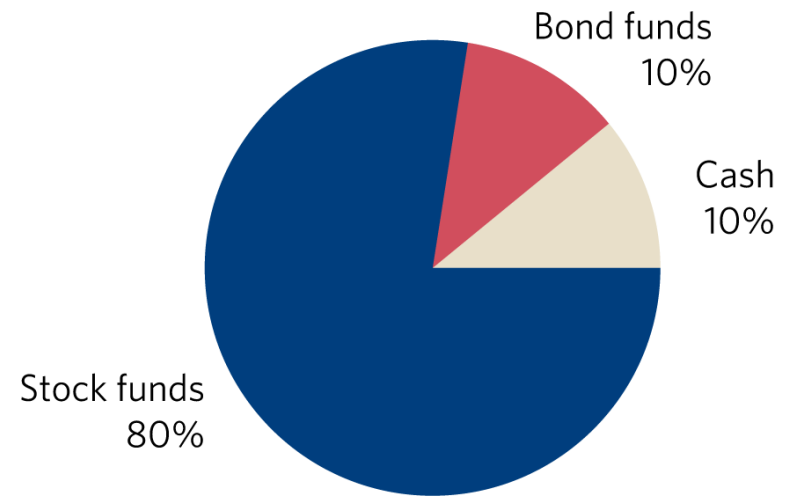
Source: *Stocks, Bonds, Bills and Inflation*. Yearbook, Ibbotson Associates, Inc.

Sample mixes

Conservative



Aggressive

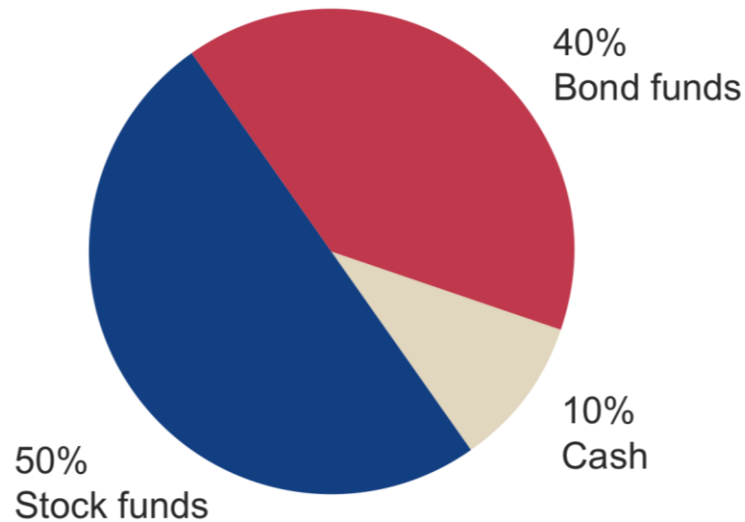


Higher potential returns generally involve greater risk and short-term volatility is not uncommon when investing in various types of funds, including but not limited to sector funds, emerging market funds and small- and mid-cap funds. Risks for emerging markets include, for instance, risks relating to the relatively smaller size and reduced liquidity of these markets, high inflation rates and adverse political developments. Risks for smaller companies include business risks, significant stock price fluctuations and reduced liquidity. Investing in higher yielding, lower rated bonds has a greater risk of price fluctuation and loss of principal and income than U.S. government securities such as U.S. Treasury bonds and bills. Treasuries are guaranteed by the government for repayment of principal and interest if held to maturity. Investors should carefully assess the risks associated with an investment in the fund. Government securities are guaranteed by the timely payment of principal and interest if held to maturity. Fund shares are not insured and are not backed by the U.S. government and their value and yield will vary with market conditions.

Rebalancing:

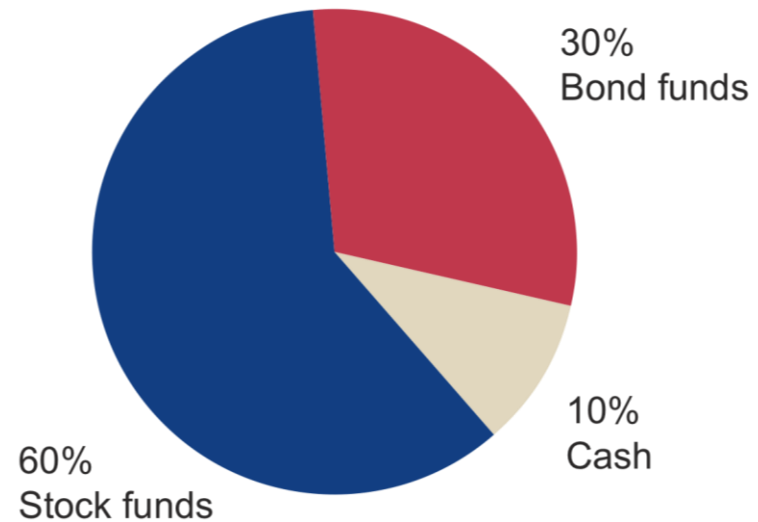
beginning of year one

Ideal allocation



end of year one

Too volatile



Rebalance
funds

8 Action steps

Retirement spending.

1. Putting it all together.
2. Sources of income.
3. Which accounts to draw from and when.
4. The critical balancing act.

The need for financial education

Workers may be guessing about how much income they will need in retirement.

- > 54% do not know what they'll need
- > They are unaware and fail to act
- > They are missing the mark of the actual cost of retirement



What to do NOW and where to get help.

1. Knowledge is power. Books that help.

1. “Money and the Meaning of Life”, Jacob Needleman
2. “Your Money or Your Life”. Joe Dominguez
3. “The Number”, Lee Eisenberg

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VC 17963 (05/2009) J71351 EE



THANKYOU

Planning for Financial Security
Financial Wellness

SAVING : INVESTING : PLANNING

VALIC



CUPA-HR'S DataOnDemand Analysis Tool

Suzi Bowen, M.A.
Research Coordinator

Today's Objectives

- Provide overview of CUPA-HR's DataOnDemand (DOD)
- Demonstrate how to use our real-time data analysis tool – DOD - to obtain custom cuts of data for salary comparison
- Answer your questions
- One-on-one DOD tutorials after session if requested

CUPA-HR Conducts Eight Surveys

- | | Begun |
|---|-------|
| • Staff Salary Surveys (annual) | |
| - Administrative Compensation Survey (AdComp) | 1967 |
| - Mid-Level Admin & Prof Salary Survey (Mid-Level) | 1998 |
| - Executive Total Compensation Survey (ETC) NEW | 2011 |
| • Faculty Salary Surveys (annual) | |
| - National Faculty Salary Survey by Discipline & Rank in Four Year Colleges & Universities (NFSS) | 1982 |
| - Two-Year College Faculty Salary Survey (TYFSS) | 2003 |
| - Contingent Faculty Salary Survey (CFSS) NEW | 2012 |
| • Benefits Survey (health care annual, other bi-annual) | |
| - Comprehensive Survey of College & University Benefits Programs (Benefits) | 2002 |
| • Benchmarking Survey (bi-annual) | |
| - HR Benchmarking & Workforce Planning Survey | 2009 |

Why Survey Participation Important

- Provides critical benchmarking data needed by all institutions
- Helps your institution:
 - Get the most out of DOD tools by including your salaries
 - Keep salaries and benefits competitive
 - Recruit/retain the most qualified staff & faculty
 - Assess its HR processes
- Enables your institution to compare itself directly to groups of peer and aspiration institutions
- Discounted pricing for results – discount greatest for CUPA-HR member participants

DataOnDemand (DOD)

- Allows users to conduct own analyses while protecting confidentiality of data – available for all surveys
- Current and prior nine years of data always available
- Provides comprehensive set of pre-defined salary reports in Excel, HTML, or PDF; other analytical tools also available
- Requires annual institutional subscription; no charge for multiple users. Can set security level per user to see institutional salary data or block this information
- 2011 DOD opened Feb 1. Subscription good from date of purchase until Jan 31 of the following year

HOW TO USE DATA-ON-DEMAND (DOD)

DOD – Five Restrictions

- No salary data are linked to a given institution (other than where a user has permission to see his or her own institution's data).
- No salary data are reported for positions with fewer than five responding institutions.
- A comparison group must include a minimum of eight institutions that participated in the survey.
- Each comparison group created and used must differ by at least three institutions from all other existing and deleted comparison groups.
- The weighted data option provides salary data only for positions with five or more responding institutions and in which all responding institutions comprise 25.0% or less of position incumbents. If a position has at least five responding institutions but one institution represents more than 25% of the incumbents, salary data is not reported. (Safe Harbor Law)

DOD - Seven Step Process

1. Login to SurveysOnline (SOL) with your UN and PW
2. Locate the DataOnDemand Menu
3. Click on "Comparison Groups"
4. Select from Public Groups or create Personal Groups
5. Check box next to each group you want to use and save – must be checked to show in report drop-down window
6. Click on "All Survey Reports" in DOD menu
7. Select the report you want, enter required information and select "Go to Report" to run

Output can be Excel, HTML or PDF

Create Your Comparison Group

1. Create your comparison group from scratch
 - Enter each school by name
2. Create your comparison group using the wizard
 - Specify selection criteria for DOD to search on such as: state, Faculty FTE, Student FTE, union vs. non-union, Carnegie Classification, Affiliation, level of instruction, region, Metropolitan Statistical Area, and NCAA Division.

It's that easy!

Create New Group From Scratch: Step 1

- Click on New Group from Scratch button








Comparison Groups

New Group Wizard New Group from Scratch

Important

Once you use a new Comparison Group, any other Comparison Groups you create must differ from it by at least 3 institutions. If you have not already done so, read the Help for this page by clicking the Help link in the upper right corner of this window. It contains critical information about creating and managing Comparison Groups.

NOTE: The **check box** next to a Comparison Group allows you to specify whether it will appear in drop-down Comparison Group selection lists while you are in DataOnDemand. Checked Groups will appear in the lists. **You must press the "Save Changes" button** to save any changes to checkboxes.

	Click this icon to rename or annotate this Group.
	Click this icon to delete a Group.
	Click to make a copy of a Group and save it in your Personal folder. You can then edit this copy.
	Click to move a Group from your Personal folder to the folder you share with others at your institution.
	Click to move a Group from your Shared folder to your Personal folder, so that others at your institution cannot make use of it.
	The + sign indicates that the Group does not include your own institution. Click this icon to make a copy that DOES include your own institution.
	The - sign indicates that the Group already includes your own institution. Click this icon to make a copy that DOES NOT include your own institution.

Create New Group From Scratch: Step 2

- Enter partial name of first school in group
- List of possible institutions will appear
- Select one wanted by checking box
- Search for each remaining school in group

Comparison Group

Search for Institutions to add

(search by name):

Institutions

Use the **Include in Group** column below to select institutions, then click **Save Comparison Group** or search again. The **Survey Participation** column shows the most recent time a institution marked a survey as "DONE"

Include in Group All None	11 Institutions				Survey Participation			
	Member Type	Institution Name	HEDunitID	unitID	Administrative Compensation	Mid-Level Admin & Prof Salaries	National Faculty Salaries	Two-Year College Faculty Salaries
<input checked="" type="checkbox"/>	M	Indiana University at Bloomington (Bloomington, IN)	151351	23663	Dec 2007	Dec 2007	Jan 2003	
<input type="checkbox"/>	NM	Indiana University East (Richmond, IN)	151388	23664	Dec 2007	Jan 2008	Jan 2003	
<input type="checkbox"/>	M	Indiana University-Purdue University Indianapolis (Indianapolis, IN)	151111	23665	Dec 2007	Dec 2002	Jan 2003	
<input type="checkbox"/>	M	Indiana University Kokomo (Kokomo, IN)	151333	23666	Dec 2007	Dec 2007	Nov 2007	
<input type="checkbox"/>	M	Indiana University Northwest (Gary, IN)	151360	23667	Dec 2007	Nov 2003	Jan 2003	

Save Comparison Group

Comp Group Name:

Comp Group Selection Criteria Description:

Create New Group From Scratch: Step 3

Comparison Group

- When done name, save
- Minimum group size 8 schools
- Each group must differ by 3 from all other groups created by your users; even deleted groups
- Until used a group can be modified without restriction

Search for Institutions to add

(search by name):

Search

Remove Unchecked Institutions

Institutions

Use the **Include in Group** column below to select institutions, then click **Save Comparison Group** or search again. The **Survey Participation** column shows the most recent time a institution marked a survey as "DONE"

Include in Group <small>All None</small>	Member Type	Institution Name	HEDunitID	unitID	Survey Participation			
					Administrative Compensation	Mid-Level Admin & Prof Salaries	National Faculty Salaries	Two-Year College Faculty Salaries
<input checked="" type="checkbox"/>	M	Indiana University at Bloomington (Bloomington, IN)	151351	23663	Dec 2007	Dec 2007	Jan 2003	
<input checked="" type="checkbox"/>	M	Johns Hopkins University (Baltimore, MD)	162928	23857	Jan 2008	Jan 2008	Dec 2002	
<input checked="" type="checkbox"/>	M	University of Michigan-Ann Arbor (Ann Arbor, MI)	170976	24015	Nov 2007	Nov 2007	Nov 2007	
<input checked="" type="checkbox"/>	M	Washington University in St. Louis (Saint Louis, MO)	179867	24139	Jan 2008	Jan 2008	Dec 2002	
<input checked="" type="checkbox"/>	M	Davidson College (Davidson, NC)	198385	24400	Dec 2007	Dec 2007	Jan 2008	
<input checked="" type="checkbox"/>	M	Duke University (Durham, NC)	198419	24402	Dec 2007	Dec 2007	Dec 2002	
<input checked="" type="checkbox"/>	M	University of Oregon (Eugene, OR)	209551	24601	Dec 2007	Dec 2007	Dec 2002	
<input checked="" type="checkbox"/>	M	Lehigh University (Bethlehem, PA)	213543	24650	Oct 2007	Oct 2007	Jan 2008	
<input checked="" type="checkbox"/>	M	Vanderbilt University (Nashville, TN)	221999	24810	Nov 2005	Dec 2004	Dec 2002	
<input checked="" type="checkbox"/>	M	Texas A & M University (College Station, TX)	228723	24883	Nov 2007	Dec 2007	Jan 2004	

Save Comparison Group

Comp Group Name:

Demonstration University Peer Group

Comp Group Selection Criteria Description:

Print

Save Comparison Group

Create New Group From Scratch: Step 4

- New group saved under “Your Personal Groups”
- Press down arrow to share group with other DOD users at your school
- To add your school to a group press + sign; to remove press – sign
- Public Groups – created by CUPA-HR National Office

Comparison Groups

New Group Wizard

New Group from Scratch

Important

Once you use a new Comparison Group, any other Comparison Groups you create must differ from it by at least 3 institutions. If you have not already done so, read the Help for this page by clicking the Help link in the upper right corner of this window. It contains critical information about creating and managing Comparison Groups.

NOTE: The **check box** next to a Comparison Group allows you to specify whether it will appear in drop-down Comparison Group selection lists while you are in DataOnDemand. Checked Groups will appear in the lists. **You must press the “Save Changes” button** to save any changes to checkboxes.

	Click this icon to rename or annotate this Group.
	Click this icon to delete a Group.
	Click to make a copy of a Group and save it in your Personal folder. You can then edit this copy.
	Click to move a Group from your Personal folder to the folder you share with others at your institution.
	Click to move a Group from your Shared folder to your Personal folder, so that others at your institution cannot make use of it.
	The + sign indicates that the Group does not include your own institution. Click this icon to make a copy that DOES include your own institution.
	The - sign indicates that the Group already includes your own institution. Click this icon to make a copy that DOES NOT include your own institution.

Delete Flagged

Save Changes

Your Personal Groups

[10 Doctoral Extensive Institutions](#)

Shared Groups (with owners)

Public Groups

[2005-06 AdComp Budget Q1: < \\$28,655,650](#)

[2005-06 AdComp Budget Q2: \\$28,655,650 - \\$57,320,857](#)

Create New Group With Wizard: Step 1

- Click on New Group Wizard

Comparison Groups








New Group Wizard

New Group from Scratch

Important

Once you use a new Comparison Group, any other Comparison Groups you create must differ from it by at least 3 institutions. If you have not already done so, read the Help for this page by clicking the Help link in the upper right corner of this window. It contains critical information about creating and managing Comparison Groups.

NOTE: The **check box** next to a Comparison Group allows you to specify whether it will appear in drop-down Comparison Group selection lists while you are in DataOnDemand. Checked Groups will appear in the lists. **You must press the "Save Changes" button** to save any changes to checkboxes.

	Click this icon to rename or annotate this Group.
	Click this icon to delete a Group.
	Click to make a copy of a Group and save it in your Personal folder. You can then edit this copy.
	Click to move a Group from your Personal folder to the folder you share with others at your institution.
	Click to move a Group from your Shared folder to your Personal folder, so that others at your institution cannot make use of it.
	The + sign indicates that the Group does not include your own institution. Click this icon to make a copy that DOES include your own institution.
	The - sign indicates that the Group already includes your own institution. Click this icon to make a copy that DOES NOT include your own institution.

Create New Group With Wizard: Step 2

Specify selection criteria, search, name and save –
Both basic and expanded Carnegie classes available

New Group Wizard

Instructions

- Select from one or more fields below. To make multiple selections from a field, hold down the Control key (Command key on a Mac) while clicking each desired option.
- Click Search button. Results will display in browser's main window. Leave this pop-up window open to adjust search criteria until satisfied with results, then close.
- Name group and click "Save List" button at top of main browser window. New group will appear under "Your Personal Groups."

Systems and States

You **must** select one or more systems:

All Systems
Alamo Community College District
Alfred University System
All Colleges & Universities Not in Systems
Antioch University System
Argosy University System
Arizona Board of Regents System
Arkansas State University System
Auburn University System
Baker College System

Select State/Province:
(optional)

AB
AK
AL
AR
AS
AZ
BC
CA
CO
CT

Other Variables (optional)

Faculty Unionized? Yes No

Total Faculty FTE is between and

Total Operating Budget is between and

Total Student FTE is between and

Participation (optional)

☒ Only include institutions that have participated in
Administrative Compensation
every year for the last 1 years
☐ in the following years:
2008-09
2007-08
2006-07
2005-06

Classifications (optional)

2005 Carnegie Class:
Unspecified
Not Classified
Associates: Public Rural-serving Small
Associates: Public Rural-serving Medium

2000 Carnegie Class:
Unspecified
Doctoral-Extensive
Doctoral-Intensive
Master's I

Affiliation:
Unspecified
Public
Private Independent
Private Religious

Level of Instruction:
Unspecified
Offers Undergraduate Only
Offers Graduate Only
Offers Both Undergraduate and Graduate

CUPA-HR Region:
Unspecified
Eastern
Southern
Midwestern

Metropolitan Statistical Area:
Unspecified
AK-Anchorage
AL-Anniston
AL-Auburn-Opelika

NCAA Div:
Unspecified
1A
1AA
1AAA

Search



Run DOD Reports

- Click DataOnDemand in menu bar; select option

Welcome, Maria Rodriguez Calcano

Personal Info

Maria Rodriguez Calcano
Senior Research Associate
Phone: (865) 862-2840
Fax: (865) 637-7674
mcalcano@cupahr.org

DataOnDemand Menu:

- Comparison Groups
- All Survey Reports** (indicated by a red arrow)
- Slide Shows
- Tables & Graphs
- Report Writer
- Sorted Lists
- Crosstabs & Frequencies
- Custom Variables
- Set Focus Institution
- About DataOnDemand

Upcoming Deadlines

Survey	Deadline
Benefits I: Health Care	Jun 7 (20 days)
Salary Surveys DOD	Expiration
Subscriptions expire	Jan 31 (258 days)

DOD Reports - Salary Surveys

<u>Report Name</u>	<u>AdComp</u>	<u>Mid-Level</u>	<u>4-Yr Faculty**</u>
Multi-Position/-Discipline*	X	X	X
Single-Position/-Discipline*	X	X	X
Ordinal Rank	X	X	X
Trend (Multi-position)	X	X	
Multi-Position Demographic	X		
Pay Scale		X	
Aggregate			X
2-Digit Index/4-Digit Index			X
6-Digit Multi-Position			X
Researchers			X

* Aging option available

** 2-Year Faculty uses fixed set of reports



Choosing Which DOD Report to Run

- **Multi-Position:** salaries for all positions or disciplines
- **Single-Position:** salary for one position or discipline
- **Ordinal Rank:** anonymous listing of salaries entered by each institution for all positions/disciplines
- **Aging:** ages salaries based on elapsed time since Oct 15 (**New**)
- **Trend:** % change in staff salaries over time (AC, ML)
- **Multi-Position Demographic:** salaries by gender, minority status or hiring source (AC only)
- **Pay Scale:** rate structure data for Mid-Level positions only
- **Aggregate:** rollup of 4-digit CIP salaries to 2-digit level
- **Index:** overall salary by rank and overall salary by discipline (2- or 4-digit) – calculation for comparison group uses a faculty distribution that is the same as your own institution

Select Report

Salary & Benefit Reports

- Can access only if report underlined
- Many reports have the option of using unweighted or weighted data

See Descriptions of the Reports

Administrative Compensation Survey

[Multi-Position Report](#)

[Trend Report \(Multi-Position\)](#)

[Single Position Report](#)

[Ordinal Rank Report](#)

[Multi-Position Demographic Report](#)

Mid-Level Salary Survey

[Multi-Position Report](#)

[Trend Report \(Multi-Position\)](#)

[Single Position Report](#)

[Ordinal Rank Report](#)

[Pay Scale Report](#)

National Faculty Salary Survey

Multi-Discipline Report

Single Discipline Report

Ordinal Rank Report

Aggregate Report

2-Digit Index Report

4-Digit Index Report

Researchers Report

Benefits 2008 - Health Care Programs

[Benefits Health Care Basics 1](#)

[Benefits Health Care Basics 2](#)

[Benefits PPO 1](#)

[Benefits PPO 2](#)

[Benefits HMO 1](#)

[Benefits HMO 2](#)

[Benefits POS 1](#)

[Benefits POS 2](#)

[Benefits CDH 1](#)

[Benefits CDH 2](#)

[Benefits Drugs](#)

[Benefits Dental](#)

Benefits 2008 - Non-Health Care Programs

[Non-Health Care Basics](#)

[Life Insurance](#)

[Short & Long Term Disability](#)

[Paid Time-Off](#)

[Tuition Benefits](#)

[Retirement Plans](#)

Unweighted versus Weighted Data

- Most DOD reports have un-weighted / weighted option
- Unweighted data gives equal weight to each **institution**
 - Use if you want to know what other institutions are paying for a given position.
- Weighted data gives equal weight to each **incumbent**
 - Use if you want to know what incumbents are earning in a given position
 - Can be overly influenced by a few institutions with large numbers of incumbents paying high or low
 - If using weighted data, also look at results unweighted

Note: To comply with DOJ Safe Harbor, weighted data not reported if one institution represents more than 25% of a position's incumbents

Unweighted versus Weighted Data

	Salary	# of incumbents	Total of salaries
School 1	\$ 10,000.00	10	\$ 100,000.00
School 2	\$ 15,000.00	2	\$ 30,000.00
School 3	\$ 25,000.00	3	\$ 75,000.00
Totals	\$ 50,000.00	15	\$ 205,000.00
Weighted Average			\$ 13,667.00
Unweighted Average			\$ 16,667.00
Weighted Average takes into account each and every incumbent			
(\$205,000/15 = \$13,667)			
Unweighted Average - each school carries same weight regardless of #			
(\$50,000/3 = \$16,667)			

Multi-Position Report

- AdComp and Mid-Level Surveys
- HTML output - can select positions; default are those your institution reported
- Excel output - get all positions, no choice
- Output can be un-weighted or weighted;
- Option to select Add'l Percentiles
- Report highlights large salary differences; can change parameters

Mid-Level Salary Survey: Multi-Position Report

Report Parameters

Focus Institution No Focus Institution

Comparison Group ML08 Participants (1125)

Year 2007-08

Weighted Statistics? Unweighted (See Help for explanation)

Output Format HTML (Standard Web Page)

Add'l Percentiles None

Positions to Highlight 20, 25, 33, 40, 60, 67, 75, 80
10, 20, 30, 40, 60, 70, 80, 90

Highlight positions where the Focus Institution's average salary is

More than 150 percent of the Comparison Group median

Less than 75 percent of the Comparison Group median

Positions to Include

Include Positions reported by focus institution in selected year [Update selection](#)

2501-2578 Academic Affairs

- ☐ 2501 Conf/Wrkshp Ed Coordinator (Cont Ed)
- ☐ 2502 Continuing Education Specialist
- ☐ 2503 Museum Curator
- ☐ 2550 Reference and Instruction Librarian
- ☐ 2551 Reference Specialist
- ☐ 2552 Catalog Librarian
- ☐ 2553 Cataloging Specialist
- ☐ 2576 Admissions Counselor
- ☐ 2577 Financial Aid Counselor
- ☐ 2578 Academic Evaluator

3501-3606 Business & Administrative Affairs

- ☐ 3501 Administrative Specialist
- ☐ 3502 Staff Attorney
- ☐ 3503 Buyer

[Go to Report](#)

AdComp Multi-Position Report Table - Excel

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Administrative Compensation Survey: Multi-Position Report														
2	Focus Institution	Demonstration University													
3	Comparison Group	ALL INSTITUTIONS (3800)													
4	Year	2005-06													
5	Statistics	Weighted													
6	Key														
7	NP - Number of Incumbents.														
8	NI - Number of Institutions. Statistics will not display when the Number of Institutions is less than 4.														
9	More than 150% of the group median														
10	Less than 75% of the group median														
11															
12	Code/Title	A. Focus Salary		B. Comparison Group Statistics (Based on Reported Average Salaries)						A's Avg. as % of B's					
13	Executive	NP	Average	Average	Median	Minimum	Maximum	NP	NI	Average	Median	20th	25th		
14	101.00 CEO of System or District			270,516	243,000	125,625	600,000	87	87			179,572	186,000		
15	101.10 Assistant to CEO of System or District			113,517	109,668	50,000	253,993	57	49			86,890	91,500		
16	102.00 CEO of Single Institution	1	254,991	214,639	192,155	53,490	850,000	1,208	1,172	118.8	132.7	142,864	150,000		
17	102.10 Assistant to CEO of Single Institution			90,556	85,748	27,467	238,317	525	494			62,568	65,949		
18	103.00 Executive Vice President			167,658	141,908	53,160	551,250	227	204			102,136	109,125		
19	Academic I														
20	201.00 Chief Academic Officer or Provost	1	254,202	148,979	133,204	53,160	594,000	1,207	1,171	143.8	160.8	98,961	103,457		
21	201.10 Associate Chief Academic Officer			107,539	99,938	23,500	309,000	786	630			79,794	83,132		
22	202.00 Chief Health Professions Officer			265,792	210,225	57,794	905,000	63	62			92,774	96,115		
23	203.00 Director, Library Services	1	62,422	85,475	77,532	27,810	295,325	1,047	1,009	73.0	80.5	57,785	60,734		
24	203.20 Acquisitions Librarian			54,327	52,510	20,600	112,767	400	377			39,782	43,701		
25	203.30 Chief Technical Services Librarian			57,776	53,802	18,537	147,168	521	495			41,649	43,667		
26	203.40 Chief Public Services Librarian			59,369	54,975	21,029	159,577	520	450			42,428	44,488		
27	204.00 Director, Institutional Research	1	76,499	77,187	75,000	27,005	225,000	815	801	99.1	102.0	56,811	59,653		
28	204.10 Associate Director, Institl Research			61,004	58,250	26,988	141,606	267	246			45,612	46,719		
29	205.00 Director, Educational Media Services			62,852	59,237	19,768	133,347	394	384			46,185	48,765		
30	206.00 Director, Learning Resources Center			59,487	56,359	22,050	167,718	252	236			44,311	45,968		
31	207.00 Director, International Education	1	70,019	82,669	73,641	31,512	185,000	272	265	84.7	95.1	57,422	60,850		

Ordinal Rank Report

Mid-Level Salary Survey: Ordinal Rank Report

- AdComp, Mid-Level and Faculty Surveys
- Anonymous listing of salaries submitted by each institution by position or discipline by rank; average also provided
- Output can be unweighted or weighted

Report Parameters

Focus Institution Demonstration University

Comparison Group AC08 Participants (1307)

Year 2007-08

Weighted Statistics? Unweighted (See Help for explanation)

Output Format HTML (Standard Web Page)

Positions to Include

Include Positions reported by focus institution in selected year [Update selection](#)

2501-2578 Academic Affairs

- ☒ 2501 Conf/Wrkshp Ed Coordinator (Cont Ed)
- ☒ 2502 Continuing Education Specialist
- ☐ 2503 Museum Curator
- ☒ 2550 Reference and Instruction Librarian
- ☐ 2551 Reference Specialist
- ☐ 2552 Catalog Librarian
- ☐ 2553 Cataloging Specialist
- ☐ 2576 Admissions Counselor
- ☐ 2577 Financial Aid Counselor
- ☐ 2578 Academic Evaluator

3501-3606 Business & Administrative Affairs

- ☐ 3501 Administrative Specialist
- ☒ 3502 Staff Attorney
- ☐ 3503 Buyer
- ☐ 3504 Buyer, Senior
- ☒ 3505 Buyer, Supervisory
- ☐ 3506 Contract and Grants Specialist
- ☐ 3526 Accountant
- ☐ 3527 Accountant, Senior

[Go to Report](#)

Ordinal Rank Report Table

- Highlighted salary is that of the focus institution
- Can use "Sorted List" analytical tool to obtain same data for one position

Mid-Level Salary Survey: Ordinal Rank Report

Focus Institution **Demonstration University**
Comparison Group ASU 15 Peers
Year 2005-06
Statistics Weighted

Code/Title	Average Salary	N
General Administration		
111 Buyer, Journey	61,007	7
111 Buyer, Journey	51,362	5
111 Buyer, Journey (focus)	43,143	8
111 Buyer, Journey	36,437	2
111 Buyer, Journey	35,786	4
111 Buyer, Journey	35,318	4
111 Buyer, Journey	34,198	5
111 Buyer, Journey	26,123	7
111 Buyer, Journey (avg)	41,432	
112 Buyer, Senior	85,709	7
112 Buyer, Senior	62,085	1
112 Buyer, Senior	55,678	6
112 Buyer, Senior	53,636	4
112 Buyer, Senior	47,656	4
112 Buyer, Senior (focus)	47,136	3
112 Buyer, Senior	40,789	4
112 Buyer, Senior	40,194	2
112 Buyer, Senior	37,215	6
112 Buyer, Senior	35,700	2
112 Buyer, Senior	33,968	6
112 Buyer, Senior (avg)	50,772	

Faculty Multi-Discipline Report

National Faculty Salary Survey: Multi-Discipline Report

- Salaries by discipline and rank for 4-digit CIP codes
- Output can be unweighted or weighted
- Option to select Add'l Percentiles

Report Parameters

Focus Institution	Demonstration University
Comparison Group	NFS08 Participants (838)
Rank	All (This may be slow)
Year	2008-09
Weighted Statistics?	Weighted (See Help for explanation)
Output Format	HTML (Standard Web Page)
Add'l Percentiles	None

Positions to Highlight

Highlight positions where the Focus Institution's average salary is

More than percent of the Comparison Group median

Less than percent of the Comparison Group median

Positions to Include

Include

[01.] AGRICULTURE, AGRICULTURE OPERATIONS, AND RELATED SCIENCES

☒ 01.00 General
☐ 01.01 Business & Mgt
☐ 01.02 Mechanization
☐ 01.03 Production Operations
☒ 01.04 Food Products Processing Mgt
☐ 01.05 Domestic Animal Svcs
☐ 01.06 Applied Horticulture/Hort Business Svcs
☒ 01.07 International
☐ 01.08 Public Svcs
☐ 01.09 Animal Sciences
☐ 01.10 Food Science & Technology
☐ 01.11 Plant Sciences
☐ 01.12 Soil Sciences
☐ 01.99 Other

[03.] NATURAL RESOURCES AND CONSERVATION

☐ 03.01 Conservation & Research
☒ 03.02 Mgt & Policy
☒ 03.03 Fishing & Fisheries Sci & Mgt
☐ 03.05 Forestry

Faculty Multi-Discipline Report Table

National Faculty Salary Survey: Multi-Discipline Report

Focus Institution Demonstration University
Comparison Group 2005-06 NFSS Participants
Year 2005-06
Statistics Weighted

Key

NP - Number of Incumbents.

NI - Number of Institutions. Statistics will not display when the Number of Institutions is less than 4.

● - More than 150% of the group median

● - Less than 75% of the group median

Code/Title	A. Focus Salary		B. Comparison Group Statistics (Based on Reported Average Salaries*)						A's Avg. as % of B's	
	NP	Average	Average	Median	Minimum	Maximum	NP	NI	Average	Median
[04.] ARCHITECTURE AND RELATED SERVICES										
04.02 Architecture										
Professor	6	102,564	85,955	83,080	48,231	126,569	289	57	119.3	123.5
Associate Professor	13	76,506	67,156	66,058	41,321	106,359	332	63	113.9	115.8
Assistant Professor	12	57,259	53,122	53,695	35,010	78,525	287	58	107.8	106.6
New Assistant Professor	2	57,500	55,295	57,100	38,251	70,000	35	27	104.0	100.7
Instructor			45,076	47,309	36,000	60,970	58	17		
04.03 City/Urban, Community & Regional Planning										

Faculty 2-Digit Index Report

- Calculates overall salary, salary by rank and salary by discipline
- Comparison group numbers based on faculty distribution of focus institution
- Allows apples-to-apples comparison
- 4-digit index report also available

National Faculty Salary Survey: 2-Digit Index Report

Report Parameters

Focus Institution	Demonstration University
Comparison Group	NFS08 Participants (838) ▼
Year	2007-08 ▼
Weighted Statistics?	Unweighted ▼ (See Help for explanation)

Positions to Highlight

Highlight positions where the Focus Institution's average salary is

More than	115	percent of the Comparison Group median
Less than	90	percent of the Comparison Group median

Go to Report

Faculty 2-Digit Index Report Table

- Overall Index: salary for all ranks and disciplines combined
- Salary by rank, all disciplines combined
- Salary by discipline, all ranks combined

National Faculty Salary Survey: 2-Digit Index Report

Focus Institution Demonstration University
Comparison Group 2005-06 NFSS Participants
Year 2005-06
Statistics Unweighted

Key

N - Number of Incumbents.

● - More than 115% of the group median

● - Less than 90% of the group median

Note: Per DOJ Safe Harbor Guidelines, statistics will not display when the Number of Institutions is less than 5 (Too few data) or, if requesting weighted statistics, when one institution's data comprises more than 25% of the total (Unbal data).

Code/Title	A. Focus Salary		B. Comparison Group Statistics (Based on Reported Average Salaries*)			A's Avg. as % of B's	
	N	Average	Average	Median	N	Average	Median
ALL 2-DIGIT DISCIPLINES REPORTED BY FOCUS UNIT COMBINED							
OVERALL INDEX	1,642	77,261	66,831	61,278	195,201	115.6	126.1
Professor	691	95,013	79,916	75,420	64,616	118.9	126.0
Associate Professor	520	67,716	61,337	57,978	57,783	110.4	116.8
Assistant Professor	391	61,957	53,249	49,072	59,872	116.4	126.3
New Assistant Professor	106	63,541	53,884	49,327	9,339	117.9	128.8
Instructor	40	44,265	44,967	42,352	12,930	98.4	104.5
[01.] AGRICULTURE, AGRICULTURE OPERATIONS, AND RELATED SCIENCES							
Index	180	70,580	70,200	76,870	2,335	100.5	91.8
[03.] NATURAL RESOURCES AND CONSERVATION							
Index	42	70,763	68,334	61,278	1,032	103.6	115.5
[04.] ARCHITECTURE AND RELATED SERVICES							
Index	23	59,667	61,995	65,041	1,316	96.2	91.7
[05.] AREA, ETHNIC, CULTURAL, AND GENDER STUDIES							
Index	2	72,652	63,988	61,045	319	113.5	119.0

TYFSS - Salaries by Level of Education

Two Year Faculty Salary Survey: Salary by Level of Education

Selection Criteria

Comparison Group TYFS07
Group Size 193 Institutions
Year 2006-07

Note: Per Department of Justice Safe Harbor Guidelines, statistics will not display when the Number of Institutions is less than 5 (too few data) or, for weighted statistics, when one institution's data comprise more than 25% of the total (unbalanced data).

Table 1. Salary by Education Level - Not Weighted

	Comparison Group Statistics							Number of
	Mean	Median	Minimum	Maximum	25%	50%	75%	Colleges
Averages								
PhD or PhD & Masters 30+	56,968	57,769	33,750	80,639	53,300	57,769	61,130	101
Master's+60	59,167	55,741	42,000	101,974	53,439	55,741	62,735	22
Master's+45	54,517	52,704	41,852	75,867	50,208	52,704	58,389	35
Master's+30	52,404	50,404	33,039	82,718	46,549	50,404	56,790	51
Master's+15	51,844	51,465	38,796	78,155	46,840	51,465	55,269	32
Master's	50,151	49,468	32,317	74,094	43,606	49,468	55,978	105
< than Masters	44,775	42,157	34,775	73,208	38,509	42,157	46,817	15
Bachelor's	49,157	48,790	28,214	69,070	41,916	48,790	57,006	92
Associate's	45,438	46,522	21,954	62,750	39,948	46,522	51,594	71
Lows								
PhD or PhD & Masters 30+	45,738	46,164	31,399	66,810	41,998	46,164	49,118	97
Master's+60	46,080	45,604	35,190	58,979	42,763	45,604	49,610	21

Additional DOD Tools Not Covered

- **Slide Shows** – provides an efficient way to explore and share survey data with others.
- **Tables & Graphs** – allows you to see multiple years of data for a single variable
- **Report Writer** – allows you to see multiple variables at once for a single year
- **Sorted Lists** – allows you to rank order Institutions in a comparison group according to values on a variable that you select. Institution name is confidential.
- **Crosstabs & Frequencies** – Used for categorical (Yes/No) variables
 - Crosstabs provide count and percentage data by cell for two variables
 - Frequencies can be used to produce a single report for one or two years and for one or multiple variables.

DOD User's Guide

- Online User's Guide available on CUPA-HR website at:

<http://www.cupahr.org/surveys/dod.asp>

Questions

