Agenda

11:30 AM    Welcome and Introductions
11:35 PM    Open Enrollment
11:50 AM    Advise to Pay (ATP) - Prudential
12:00 PM    Finance Update
12:10 PM    Inclusive Leadership – Dina Levi
12:30 PM    PMP Update
12:35 PM    JCCR Update
12:40 PM    Staff Survey
12:45 PM    HR Assessment/Transformation Adjourn
12:50 PM    Announcements/Reminders
1:00 PM     Adjourn
Open Enrollment
2017-18 Open Enrollment
Health, Life Insurance & Amherst Plan

Open Enrollment: May 8th – June 2nd
2017-18 OPEN ENROLLMENT

• Open Enrollment Period: May 8th through June 2nd

• All Changes will become effective on July 1, 2017

• During open enrollment employees may:
  
  • Enroll in, cancel or modify Medical, Dental or Vision Coverage
  • Transfer between Medical Plans
  • Add or Delete dependents
  • Apply for sliding scale considerations
  • Enroll or Re-enroll in Flexible Spending Plans (All active employees must re-enroll)
  • Increase Supplemental Life Insurance election by 1X salary coverage
2017-18 OPEN ENROLLMENT

- The Benefits Fair and Enrollment Meetings are in the process of being scheduled

- All enrollment or drop/add forms must be submitted by June 2nd

- Sliding Scale applications must be returned by June 30th
2017 MEDICAL RENEWAL HIGHLIGHTS

• The average increase from Blue Cross Blue Shield (BCBS) for the 2017/2018 plan year is 2.8%, or an average weekly/monthly increase of approximately:

<table>
<thead>
<tr>
<th></th>
<th>Individual Coverage Weekly Increase</th>
<th>Family Coverage Weekly Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>HMO Blue</td>
<td>$0.63</td>
<td>$3.40</td>
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<tr>
<td>HMO Blue Deductible</td>
<td>$0.18</td>
<td>$2.23</td>
</tr>
<tr>
<td>Blue Choice</td>
<td>$1.79</td>
<td>$6.44</td>
</tr>
<tr>
<td>PPO</td>
<td>$2.54</td>
<td>$8.29</td>
</tr>
</tbody>
</table>

• The renewal is based on 24 months of claims (10/2014 – 9/2016, paid through 11/2016).
2017 MEDICAL RENEWAL HIGHLIGHTS

• Medical trend is 8.3% (up from 7.4% last year) and pharmacy trend is 18% (up from 14.6% last year).

New Benefit – Effective January 1, 2017!
• BCBC has included 3D Mammogram coverage on all fully-insured plan offerings.

Sliding Scale
• We will continue to provide the sliding scale program of reduced premiums for certain income levels. Income levels have been adjusted upward based on the CPI for 2016 (2.1%).
## Sliding Scale - Family

### July 1, 2017 - June 30, 2018

<table>
<thead>
<tr>
<th>Sliding Scale Level*</th>
<th>Level 6**</th>
<th>Level 5**</th>
<th>Level 4**</th>
<th>Level 3**</th>
<th>Level 2**</th>
<th>Level 1</th>
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<tbody>
<tr>
<td>Household Income</td>
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<td>Household Income</td>
<td>Household Income</td>
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<td>$56,588 - $59,875</td>
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<td>$63,164 - $66,449</td>
<td>Equal to or Greater Than $66,450</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Income Range</th>
<th>College Contribution</th>
<th>HMO BLUE FAMILY COVERAGE</th>
<th>HMO BLUE DEDUCTIBLE FAMILY COVERAGE</th>
<th>BLUE CHOICE FAMILY COVERAGE</th>
<th>BLUE CARE ELECT PPO FAMILY COVERAGE</th>
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<tr>
<td>$53,300 - $56,587</td>
<td>$1,477.23</td>
<td>$1,793.18</td>
<td>$1,654.14</td>
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<td>$56,588 - $59,875</td>
<td>$1,440.30</td>
<td>$1,793.18</td>
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<td>$2,152.55</td>
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<td>$63,164 - $66,449</td>
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<tr>
<td>Equal to or Greater</td>
<td>$1,329.51</td>
<td>$1,793.18</td>
<td>$1,654.14</td>
<td>$2,152.55</td>
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<tr>
<td>Than $66,450</td>
<td>$1,292.58</td>
<td>$1,793.18</td>
<td>$1,654.14</td>
<td>$2,152.55</td>
<td>$2,371.73</td>
</tr>
</tbody>
</table>

*Household Income*

**Monthly Premium Cost**

- Level 6: $1,793.18
- Level 5: $1,793.18
- Level 4: $1,793.18
- Level 3: $1,793.18
- Level 2: $1,793.18
- Level 1: $1,793.18

**Monthly Employee Cost**

- Level 6: $315.95
- Level 5: $352.88
- Level 4: $389.81
- Level 3: $426.74
- Level 2: $463.67
- Level 1: $500.60

**Weekly Employee Cost**

- Level 6: $72.91
- Level 5: $81.43
- Level 4: $89.96
- Level 3: $98.48
- Level 2: $107.00
- Level 1: $115.52
## Sliding Scale - Individual

**July 1, 2017 - June 30, 2018**

<table>
<thead>
<tr>
<th>Sliding Scale Level*</th>
<th>Level 6**</th>
<th>Level 5**</th>
<th>Level 4**</th>
<th>Level 3**</th>
<th>Level 2**</th>
<th>Level 1 **</th>
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<tbody>
<tr>
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### HMO BLUE INDIVIDUAL COVERAGE

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### HMO BLUE DEDUCTIBLE INDIVIDUAL COVERAGE

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<tr>
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<td></td>
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<td>$64.27</td>
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### BLUE CHOICE INDIVIDUAL COVERAGE

<table>
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<td>$821.59</td>
<td>$255.25</td>
<td>$58.90</td>
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### BLUE CARE ELECT PPO INDIVIDUAL COVERAGE

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<th>Monthly Employee Cost</th>
<th>Weekly Employee Cost</th>
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<td>$63.00</td>
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<td>$287.18</td>
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<tr>
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<td>$910.15</td>
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<tr>
<td></td>
<td>$910.15</td>
<td>$343.81</td>
<td>$79.34</td>
</tr>
</tbody>
</table>
NEW BENEFITS & INITIATIVES

Care.com is a public corporation headquartered in Waltham Massachusetts, that helps families find child care, senior care, special needs care, tutoring, pet care, housekeeping, etc. The site has 22 million members across 19 countries, and attracts 6.4 million unique visitors a month, with a new job posted every 30 seconds.

Amherst will offer all employees a free premium membership. This will allow all employees the ability to view details and make contact with an unlimited number of caregivers, access background check options and references.
BenefitHub is a portal that allows for discounted pricing on merchandise:

- Over 50,000 local deals including restaurants, spas, gyms, travel and more.
- 7 million discounted tickets to sporting events, concerts, theaters, movies and theme parks.
- 100,000 offers from top brands and stores - with new offers added daily.
- Ability to receive Pet Insurance at a discounted rate.
OTHER BENEFITS & INITIATIVES

• **Dental Renewal:** No increases this year!

• **Vision Renewal:** 2.5% increase, or $0.15 Individual /$0.38 Family (Monthly)

• **Life and Disability:**
  
  • SBA last conducted an Request For Proposal for the Five Colleges group (minus Umass)

  • All groups are up for renewal either July 1, 2017 or January 1, 2018

  • 10 bidders were invited to participate: Liberty Mutual, **Lincoln Financial**, MetLife, Prudential, Reliance Standard, SunLife, **Symetra**, The Hartford, The Standard, **Voya** (incumbents noted in bold).
Experience. Prudential.

The Rock Symbol and the Prudential Name are Among the Most Widely Recognized Brands in the U.S.¹

#1 “World’s Most Admired Companies®” Insurance: Life, Health Category²

100 years in group insurance¹

$1.1 trillion in total assets under management³

A.M. Best: A+ (Superior)⁴

Standard & Poor’s: AA- (Very Strong)⁴

Moody’s: A1 (Good)⁴

Fitch: A+ (Strong)⁴

1 Prudential Brand Image Study, Wave 43, January 2013. 2 FORTUNE® magazine, 2016 World’s Most Admired Companies®, Insurance: Life and Health category, March 1, 2016. 3 2016 PROXY STATEMENT PRUDENTIAL FINANCIAL, INC. 4 Ratings, www.investor.prudential.com, as of February 10, 2016. AAA (Extremely Strong) is the highest of 24 ratings that Standard & Poor’s extends, the lowest being R (has experienced regulatory action), and is a measure of claims-paying ability. Aaa (offers exceptional financial security) is the highest of 21 ratings that Moody’s extends, the lowest being C (having extremely poor prospects of ever offering financial security) and is a measure of financial security. A++ (Superior) is the highest of 15 ratings that A.M. Best extends, the lowest being F (In Liquidation), and is a measure of claims-paying ability. AAA (Exceptionally Strong) is the highest of 21 ratings that Fitch Ratings extends, the lowest being D (Distressed), and is a measure of insurer financial strength. Ratings are not an indication of any variable portfolios’ performance, which fluctuates with market conditions. Ratings are not a guarantee of future financial strength and/or claims-paying ability.
EXPERIENCE AN EASY, EMPLOYEE-FOCUSED APPROACH
Single Claim Management System

Seamless Integration

- Claim Intake
- Rules Engine
- Employee Data
- Plan Data
- Regulations
- Communications
- Two-way Texting
- Real-Time Status
- Reports

Real-time Status

Two-way Texting

Communications
Expert Claims Decisions Made Quickly

Over 88% of STD decisions of approved or denied made within 10 business days of first notice or date of disability¹

¹ Prudential Distribution Service Metrics, 2016.
A True Partnership to Support Amherst College Employees

✓ Prudential’s Telephonic Intake Process
  • Makes filing a claim easy for employees with automatic transition to LTD

✓ Clinical Expertise
  • Prudential’s Clinical resources provide ongoing claim management

✓ Flexibility
  • Advice to Pay arrangement so Amherst College makes the final decision on whether or not someone will be paid Short Term Disability benefits

✓ Streamlined Administration
  • 24/7, 365 real-time access to reports, claimant status, separate filings not required for STD and LTD submissions

✓ Consistency
  • Outsourcing STD ensures that the same parameters are applied consistently for all claims.
Finance Update
AC Data – new functionality
Do NOT Print My Pay Advice

<table>
<thead>
<tr>
<th>Department</th>
<th># of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>European Studies</td>
<td>1</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>10</td>
</tr>
<tr>
<td>Board of Trustees</td>
<td>1</td>
</tr>
<tr>
<td>Institutional Research</td>
<td>3</td>
</tr>
<tr>
<td>Chief Advancement Officer</td>
<td>2</td>
</tr>
<tr>
<td>Seymour Shed</td>
<td>1</td>
</tr>
<tr>
<td>Center Community Engagement</td>
<td>4</td>
</tr>
<tr>
<td>Off Environment! Sustainability</td>
<td>2</td>
</tr>
<tr>
<td>Campus Center</td>
<td>1</td>
</tr>
<tr>
<td>Office of General Counsel</td>
<td>4</td>
</tr>
<tr>
<td>Education Abroad</td>
<td>2</td>
</tr>
<tr>
<td>Registrar</td>
<td>6</td>
</tr>
</tbody>
</table>

Benefits of Direct Deposit & Electronic Pay Advices:

- No lost or damaged checks
- Saves time not having to deposit checks
- Access to earnings on payday
- Pay is deposited even when you are sick or on vacation
- Pay is easily divided into multiple accounts
Self-Service Banking information

For those setting up a ‘Five College’ account, please fill out the ‘UMass / Five College Federal Credit Union Direct Deposit Form’ found [here](#) and submit to the Controllers office.

Banking Information

### Active Accounts

Welcome to Self-Service Banking! If you want to add a new account click on “Add an Account.” If you want to change information on an existing account click on the bank name. You will go to a screen with more detail. Please verify all information before you leaving this screen. Any errors will cause a delay in the activation of your direct deposit. Direct deposit information is pulled every Wednesday afternoon and submitted to the ACH to be verified. If no errors, Your direct deposit should start on the next payroll.

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<thead>
<tr>
<th>Payroll Deposits</th>
<th>Verification</th>
<th>Amount</th>
<th>Deposit Priority</th>
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</thead>
<tbody>
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<td>1</td>
</tr>
<tr>
<td>USALLIANCE FEDERAL CU</td>
<td>Verified ✔</td>
<td>[redacted]</td>
<td>2</td>
</tr>
<tr>
<td>USALLIANCE FEDERAL CU</td>
<td>Verified ✔</td>
<td>Balance</td>
<td>Last</td>
</tr>
</tbody>
</table>
AC Dollar Account

### Spending History

Select a date range for which you would like to see your account activity. Then select the account for which you would like to see the history.

**From:** January 01 2017
**To:** January 31 2017
**Accounts:** Monthly Paid Employee

<table>
<thead>
<tr>
<th>Post Date</th>
<th>Location</th>
<th>Account</th>
<th>Amount</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
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</tr>
<tr>
<td>01/10/2017 12:32:43</td>
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<td>Monthly Paid Employee</td>
<td>$3.00</td>
<td>$-11.24</td>
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<tr>
<td>01/18/2017 02:30:03</td>
<td>Payroll Deduction</td>
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<td>01/17/2017 11:56:45</td>
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<td>01/30/2017 12:22:45</td>
<td>Dining Hall</td>
<td>Monthly Paid Employee</td>
<td>$3.00</td>
<td>$-6.00</td>
</tr>
</tbody>
</table>
Online time & leave tracking – Kronos Workforce Ready
Inclusive Leadership
Inclusive Leadership

Prologue
Inclusive Leadership at Amherst College

• What is Inclusive Leadership
• Why Inclusive Leadership
• An Invitation to Collaborate
The What: Inclusive leadership...

- Creates an inclusive culture that leverages diverse talents
- Builds trust through equity, candor, transparency
- Motivates all employees to innovate, excel, grow personally and professionally; clears the path for them to do so
- Champions the value and importance of D&I through equitable practices including hiring, development, promotion & retention
- Empowers change agents
Why: Inclusive Leadership is...

• A necessary component of:
  – Effective leadership
  – An inclusive culture
  – Equitable practices in
    • Hiring
    • Promotions
    • Retention
  – Innovation

• Empowering:
  – Those who may not see themselves as “Leaders”
  – Those eager to be involved but lacking access/authority

• One necessary component of an inclusive community
Inclusive Leadership is a Component of a Greater Goal:

• Culture of intentional inclusion
• Accountability for behavior and organizational norms, steeped in organizational values
• Clear opportunities and paths for personal and professional growth
• Total Employee Engagement
• Parity in hiring, promotions & retention
• Proactive Recruiting and Workforce Planning
• Systems, processes and practices are optimized to support desired outcomes
• Organizational cultural competence
Inclusive Leadership at Amherst College – Year 1

- Work in community to:
- Identify critical competencies
- Develop curricular offerings to support critical competencies
- Create baseline measurements (including workforce analysis & climate survey)
- Consider mechanisms for community engagement, including potentially establishing Employee Resource Groups
Discussion
PMP Update
Performance Management Process Update

- 184 of 677 - 27.18% evaluations completed
- 209 of 677 - 30.87% self-evaluations completed
- Evaluation Period Ends on May 12th

<table>
<thead>
<tr>
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<td><strong>184</strong></td>
<td><strong>677</strong></td>
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</table>
Important deadlines and reminders:

- Performance evaluation period - **April 1, 2016 to March 31, 2017.**
- 2017 Online Evaluation Process - **March 27, 2017 to May 12, 2017.**
- Self-Evaluation Period - **March 27, 2017 to April 7, 2017.**
- Employees interested in submitting a self-evaluation must do so before **April 7, 2017.**
  - Employees who are not interested in submitting the self-evaluation form can create and save it as a “draft”. The form will not be visible to the supervisor.
- Supervisors and employees can start working on their evaluations and self-evaluations prior to the conclusion of the evaluation period, but please save them as a draft and do not submit until **April 1, 2017.**
- All performance evaluations must be completed, discussed and electronically approved no later than **May 12, 2017.** This will provide us with the necessary time to process the salary increases and letters.
PMP Reminders

– All employees, including green deans, employees on term appointments or grant funded positions, must receive an evaluation in order to be eligible for a salary increase. *Salary increases will not be processed without an approved performance evaluation.*

– Compensation changes processed after **March 31, 2017** will include the salary increase. This includes promotions, adjustments, etc.

– Employees who have completed six months of service between **January 6 - June 30, 2017**, and who have demonstrated acceptable performance will be eligible for a salary increase.

– Supervisors must complete an evaluation with an overall rating for employees who have completed or are expected to complete their probationary periods before **June 30, 2017**. Please contact the Office of Human Resources (OHR) to receive specific instructions.
PMP Reminders

Merit Program

• We will follow the same methodology for merit implemented last year:
  A ‘base raise’ will be provided in an equal percentage for all employees
  performing at the “Effective” level and above. In addition, an extra pool of
  funds will be available for supervisors to distribute at their discretion,
  following certain parameters, to recognize and reward strong performance.
  ➢ Such parameters include: the impact the performance has on the
    department’s operation, achievement of department goals, team
    effectiveness, productivity, etc.
  ➢ The base percentage increase and percentage available for additional
    rewards will be decided during our budget review process in the spring,
    and communicated at that time.
  ➢ Please note that there is no “intended distribution” or “quota” for salary
    increases.
JCCR Update
JCCR Next Steps

- HR finalizes the review of the slotting with Senior Staff
- Senior Staff shares the slotting with Department Heads/Chairs and Supervisors
- HR provides orientations and attend department meetings to explain the new job groups and levels
- Supervisors meet with employees and confirm placement in the job structure
- Sullivan-Cutter updates slotting, reviews Census Data, prepares costing and confirms Compensation Philosophy
- HR shares final slotting and placement in the new compensation structure with Senior Staff
- Senior Staff shares the final placement in the compensation structure with Department Heads/Chairs and Supervisors
- HR provides orientations and attend department meetings to explain the new job groups and levels
- Supervisors meet with employees who are receiving compensation adjustments
- Final implementation on July 1, 2017
Staff Survey
Staff Survey

• Managed by Sibson Consulting

• Input from Employee Council and Managers Council

• Focus Groups in May
  o May 1st and 2nd – 63 participants
  o Six sessions scheduled for May 11th

• Implementation in early fall

• Staff Survey Advisory Committee
  o Jesse Barba, Director of Institutional Research
  o Jim Brassord, Chief Campus Operations
  o David Hamilton, Chief Information Officer
  o Lisa Rutherford, General Counsel & Policy Officer
  o Maria-Judith Rodriguez, Chief Human Resources Officer
  o Norm Jones, Chief Diversity & Inclusion Officer
  o Sandy Genelius, Chief Communications Officer
HR Assessment and Transformation
HR Assessment

Key Findings:

• Strong Leadership
• Committed HR Staff
• Lean Structure
• Need for Technology
• Cultural Implications
• Move from Transactional to Transformational
## HR Transformation

### Work Timeline

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
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</thead>
<tbody>
<tr>
<td>Establish the HR Vision and Mission</td>
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<td>Map, Streamline, and Simplify Core HR Processes</td>
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<td>Design the Future HR Organization and HR Strategic Plan</td>
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<td>Provide Strategic Support for CHRO</td>
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<td>Communication and Change Management Support</td>
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2017
Save the Date!

- Amherst & You - A Welcome Event for New Employees
  June 22, 8:30 AM to 3:00 PM

- Upcoming Supervisory Forum dates
  - August 10
  - November 9
  - February 8, 2018
  - May 10, 2018
Summer Sessions to look forward to

• **Smoking Cessation** – June 15 – August 3 (8 weeks), 1:00 – 2:00 PM each week

• **Hitting Your Targets / Archery at Work** – July

• **Wellness Webinar** – TBD

• **Wellness Walking Challenge** – TBD

• And more...
Friend us on Facebook
Staff Events

• Employee Picnic and Recognition Award: Wednesday, May 31
• Milestone Anniversary Luncheon: Wednesday, June 7
• Retirement and 25+ Club Dinner: Monday, June 12
Future Meetings

Let us know what you want to know!
Questions?
Thank you for your participation! 😊