Amherst College
Office of Human Resources (OHR)

Supervisory Forum
May 2, 2019
Agenda

11:30 AM  Welcome and Introductions

11:35 AM  BIG Update

11:45 AM  Ombudsperson

11:50 AM  Recognition and Rewards Update

11:55 AM  CRGs Update
          PMP Update

12:05 PM  Open Enrollment Period 2019

12:20 PM  Goal Setting Training

12:40 PM  Announcements/Reminders

12:45 PM  Adjourn
BIG Update
What do you anticipate will be the biggest challenge for the Amherst College community when it decides to implement a new ERP?

- Change management (20)
- Decision-making/institutional will (13)
- Data access and/or data integration (11)
Which feature or features in Workday do you think will bring the most value/improvement to Amherst College?

- Standardized/electronic workflows:
  - Will create efficiencies
  - Will create accountability
  - Transparency and tracking of processes
  - Less paper
- Better data accessibility, security & reporting
- Cloud-based system
- Ability to better integrate data/share data across campus
- Specific functionality mentioned include:
  - Expense processing and reimbursements
  - Electronic timesheets
  - Academic audit
  - Org charts
  - Grants
Any suggestions for making the ERP implementation as successful as possible?

- LOTS of training & support/resources for implementation
- Take time necessary for well thought out/planned implementation
- Involve the frontlines/SMEs to understand and develop processes also to identify/develop data integrations needed
- Provide sufficient backup to allow staff to participate
- Ongoing communications
- Institutional will to implement best practices, make decisions and move project/workflows forward
- Consider project vis a vis the larger enterprise architecture
Please tell us a little more about yourself:

46 responses

- Faculty
- Staff
- Student
- Casual
- I like long walks on the beach... ha!
Ombudsperson
Office of the Ombudsperson

- Informal resource for faculty, administration and staff
- Sounding board for employees to discuss concerns
- Coaching and assistance in thinking through options
- Key principles for the office:
  - Confidentiality
  - Neutrality
  - Informality
  - Independence
- Services include confidential 1-on-1 counseling, as well as more active involvement where appropriate -- neutral facilitation or mediation.
Examples of Concerns you might discuss with the Ombudsperson

- I’m having a conflict with a colleague, subordinate or supervisor, and am not sure what to do....

- I need to engage in a difficult conversation and need some coaching in how to do it....

- I’m having issues with giving or receiving feedback....

- I have an ethical dilemma and would like to discuss my options....

- I need help with a policy clarification....
Larry Hunt
Contact Info and Schedule

• Office Hours - Tuesday and Wednesday 10:00 a.m. - 4:00 p.m.
• Valentine Hall - #117
  • Available to meet elsewhere if preferred
• 413-542-5156
• lhunt@amherst.edu

https://www.amherst.edu/offices/ombuds
Recognition and Rewards Update
## Recognition and Rewards: Amherst Appreciations Stats

<table>
<thead>
<tr>
<th>Month</th>
<th>Staff Shout-Outs</th>
<th>Spot Awards</th>
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<tbody>
<tr>
<td>November 2018</td>
<td>43</td>
<td>1</td>
</tr>
<tr>
<td>December 2018</td>
<td>106</td>
<td>34</td>
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<tr>
<td>January 2019</td>
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<td>February 2019</td>
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<td>March 2019</td>
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<td>12</td>
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<td>April 2019</td>
<td>56</td>
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<table>
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<tr>
<th>Recognition Award</th>
<th>Nominations</th>
<th>Completed (have two testimonials)</th>
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<tr>
<td>1821</td>
<td>17</td>
<td>7</td>
</tr>
<tr>
<td>Herd of the Year</td>
<td>6</td>
<td>5</td>
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PMP 2019 Update
PMP 2019 Stats

As of today:

**Self Evaluation**

- # of completed and submitted: **301**
- # of completed but not submitted: **24**
- # of unfinished: **400**

**Evaluations**

- # and % of completed: **81 - 11%**
Colleague Resource Groups (CRGs)
### Colleague Resource Groups (CRG) Pilot Groups

<table>
<thead>
<tr>
<th>CRG</th>
<th>Upcoming Meeting Time</th>
<th>Facilitator(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Generation</strong></td>
<td><strong>TBD</strong></td>
<td>Tenzin Kunor <a href="mailto:tkunor@amherst.edu">tkunor@amherst.edu</a></td>
</tr>
<tr>
<td><strong>Gaming</strong></td>
<td>Monday, April 29th, 12:00 - 1:00 p.m., Science Center Classroom E208</td>
<td>David Hamilton <a href="mailto:dhamilton@amherst.edu">dhamilton@amherst.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Marisa Parham <a href="mailto:mparham@amherst.edu">mparham@amherst.edu</a></td>
</tr>
<tr>
<td><strong>Latinx</strong></td>
<td><strong>Staff and Faculty Domino Tournament</strong>, Thursday, May 2nd, 12:00 - 1:30pm, Valentine Quad</td>
<td>Eva Díaz <a href="mailto:ediaz@amherst.edu">ediaz@amherst.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ed Maldonado <a href="mailto:emaldonado@amherst.edu">emaldonado@amherst.edu</a></td>
</tr>
<tr>
<td><strong>LGBTIQ+</strong></td>
<td>Thursday, May 2nd, 4:00 - 5:00p.m., Terrace Room B, Valentine Hall</td>
<td>Jxhn Martin <a href="mailto:jsmartin@amherst.edu">jsmartin@amherst.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sebastian Merrill <a href="mailto:smerrill@amherst.edu">smerrill@amherst.edu</a></td>
</tr>
<tr>
<td><strong>Outdoors</strong></td>
<td><strong>Bike Repair Clinic</strong>, Tuesday, May 7th, 3:00 p.m. - 4:00 p.m., Limited enrollment so please register early.</td>
<td>Hayley Singleton <a href="mailto:hsingleton@amherst.edu">hsingleton@amherst.edu</a></td>
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<tr>
<td></td>
<td></td>
<td>Stephen Butler <a href="mailto:sdbutler@amherst.edu">sdbutler@amherst.edu</a></td>
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<tr>
<td></td>
<td></td>
<td>Matt Hart <a href="mailto:marhart@amherst.edu">marhart@amherst.edu</a></td>
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<td><strong>People of Color</strong></td>
<td><strong>TBD</strong></td>
<td>Chris Campbell <a href="mailto:cgcampbell@amherst.edu">cgcampbell@amherst.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Min Cheng <a href="mailto:mcheng@amherst.edu">mcheng@amherst.edu</a></td>
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Open Enrollment Period 2019
2019-20 Open Enrollment

2019-2020 Amherst College Benefits Overview
A Guide to Your Benefit Programs
2019 RENEWAL HIGHLIGHTS

• **No Premium Increase for:**
  • Medical
  • Dental
  • Vision
  • Life Insurance

• **High Deductible Health Plan:**

  • For the past few years, Amherst has been considering offering a High Deductible Health Plan, based on feedback from current, new and prospective staff and faculty.

  • Effective July 1, 2019, Amherst will introduce Blue Care Elect Saver with Coinsurance, a High Deductible Health Plan (HDHP) with a Health Savings Account (HSA).
2019 RENEWAL HIGHLIGHTS

• **High Deductible Health Plan Continued**

  The HDHP costs less per pay period but has higher deductibles than other plans; it also has a deductible that applies to all medical services (except preventive) and prescription drugs before the plan pays:

  • **Individual:** $1,500  
  • **Family:** $3,000

  Once the plan begins to pay, you will pay coinsurance (a percentage of the cost) until the out-of-pocket maximum is met. With this plan, you will pay less out of your paycheck but more out of pocket when you receive care:

  • **Individual:** $3,000  
  • **Family:** $6,000
2019 MEDICAL RENEWAL HIGHLIGHTS

*High Deductible Health Plan/Health Savings Account:*

- You will also have access to an HSA, a tax-advantaged account that allows you to save for qualified expenses on a pre-tax basis.

- The calendar year 2019 HSA contribution limits: $3,500 for individual coverage or $7,000 for family coverage.

- Amherst College will contribute $500/$1,000 to your HSA.

- The HDHP with HSA will be offered alongside our three current plans: HMO Blue, HMO Blue with Deductible and Blue Choice POS (plus a PPO option for those living outside Massachusetts). There will be no changes to the existing plans.
High Deductible Health Plan/Health Savings Account:

According to the IRS regulations, to be eligible to make and receive contributions to an HSA, you must be enrolled in a HDHP. In addition:

• You can not be enrolled in another HDHP
• You cannot be enrolled in a FSA in the same year. Starting on 7-1-2019
• You cannot be enrolled in Medicare or Medicaid
• You cannot be claimed as a dependent on someone else’s tax return
• **If you currently are enrolled in a FSA, you must have a zero balance on 6-30-2019**
NEW! Plan Selection Tool: alex®

Picking the right benefit plans can be a challenge. Which medical plan is best for me? Is my current medical plan still right for me, or should I consider the new HDHP? How much should I save in my Flexible Spending Account? Does a Health Savings Account make sense for me? These decisions are important, and a lot goes into making these choices for you and your family.

To make the process easier for you, Amherst College will offer an easy-to-use online tool called ALEX. All you have to do is log on from any computer or mobile device and respond to ALEX’s questions. ALEX will prompt you for some basic information about you and your family. Your responses will remain completely confidential and will be used only to help you with your decision-making process. You can print out your selections and plan details, and use them to complete your enrollment form.

Scan this code on your phone or visit https://www.myalex.com/amherst/2019 to give ALEX a try.
**Blue Choice POS**

- **View/compare details**
- **In-network**
- **Premium**: $859.97 every month
- **Family deductible**: No deductible
- **Family out-of-pocket maximum**: $4,000

**I'm ready to choose this plan**

**HMO Blue**

- **View/compare details**
- **In-network**
- **Premium**: $500.60 every month
- **Family deductible**: No deductible
- **Family out-of-pocket maximum**: $4,000

**I'm ready to choose this plan**

**HMO Blue Deductible**

- **View/compare details**
- **In-network**
- **Premium**: $361.56 every month
- **Family deductible**: $1,000
- **Family out-of-pocket maximum**: $4,000

**I'm ready to choose this plan**

**Blue Care Elect Saver with Coinsurance (High Deductible Health Plan)**

- **View/compare details**
- **In-network**
- **Premium**: $245.97 every month
- **Family deductible**: $3,000
- **Family out-of-pocket maximum**: $6,000

**I'm ready to choose this plan**
2019 MEDICAL RENEWAL HIGHLIGHTS

Plan Comparison Cost and Savings:

• Blue Choice (70 ee’s) to HMO Blue (650 ee’s): **$4,288 Savings**
• Blue Choice to HMO Blue Deductible (180 ee’s): **$5,981 Savings**
• HMO Blue to HDHP with HSA: **$3,060 Savings**
• HMO Blue Deductible to HDHP with HSA: **$1,382 Savings**
• Blue Choice to HDHP with HSA: **$7,368 Savings**
  • Both plans offer the nationwide BCBS network
2019 ADDITIONAL BENEFITS

**BenefitHub:** [https://benefithub.wistia.com/medias/mo6lxk95m5](https://benefithub.wistia.com/medias/mo6lxk95m5)

- Nationwide Pet Insurance: Fix premium and no age limits

**Care.com:**

- Provides local service for child care, senior care, tutoring, pet care and house-keeping.
- Amherst College covers the monthly access fee for all employees.
- Visit amherstcollege.care.com and enter your Amherst Employee ID to validate.
- [https://www.youtube.com/watch?v=1eCm331iEXA](https://www.youtube.com/watch?v=1eCm331iEXA)
2019-20 OPEN ENROLLMENT

• Benefits Fair:
  • Thursday May 23rd
  • 10:00-2:00 p.m.

• Enrollment Meetings:
  • Wednesday, May 15;
    3:00-4:00 p.m.
    Keefe Campus Center Theatre
  • Tuesday, May 21;
    3:00-4:00 p.m.
    Keefe Campus Center Theatre

• All enrollment or drop/add forms must be submitted by June 28th
• Sliding Scale applications must be returned by June 28th
Goal Setting

1. All staff members are expected to execute against their core job duties and responsibilities to the best of their abilities.

2. Identify department goals and/or objectives (1-5 items) for the coming year using the **SMART** criteria (**Specific**, **Measurable**, **Achievable**, **Relevant**, **Trackable**). Employees can also identify additional goals they would like to include, as well as opportunities for growth and development.
OPM Enhancements/Reminders

- We continue to enhance the ability to update employees and supervisors. The turn around time will be the same day.

- The data will be frozen as of April 1, 2019, with the exception of employees that terminate throughout the evaluation process.

- Employees are provided with two weeks to submit their self-evaluation.

- Supervisors can start working on their evaluations and save them as DRAFT until the self-evaluation period is completed.

- Department Heads and Senior Managers now have the ability to add comments to the evaluations.
Goal Setting Training – Part II
PMP 2019 Steps

- **Self-Evaluation**: Staff member completes self-evaluation form including identifying initial goals for the coming evaluation period.
- **Performance Evaluation**: Supervisor completes evaluation and identifies staff member’s goals for the coming year.
- **Mid-Year Check-In**: Staff member and supervisor have a conversation about progress toward goals and performance to date.
- **Evaluation Discussion and Goal Setting**: Supervisor and staff member meet to discuss the evaluation and finalize goals for the coming year.
Goal Setting

What happened in your goal setting conversations with staff this year?

– What worked well?
– What would you want to do differently?
Goal Setting

What best practices would you want to share with your colleagues about the goal setting process?
Goal Setting

**Performance Planning**
- Dialogue between a supervisor and employee
- Establish clear, specific, performance goals and expectations
- At the beginning of the performance cycle

**Performance Review, Evaluation and Development**
- Summative two-way discussion and written documentation focusing on employee performance
- Reviews areas of excellence; progress on workplace priorities; goals for improvement; and development needs

**Performance Coaching, Feedback, and Documentation**
- Regular two-way discussions focusing on work progress and quality
- Regularly observing, monitoring, and documenting performance throughout the year
Goal Setting Conversations

Purpose

• Have a dialogue that focuses the employee on exactly what needs to be done and by when
• Start the process by setting the person up for success, growth and development
• The goal becomes the center of future check-in meetings and conversations

Goal Setting – *What am I supposed to be doing*

• creates clear and compelling goals (both people agree to the goal)
• written down
• goals provide opportunity to successfully achieve the tasks
• focus the employee on exactly what needs to be done by when
• done at the beginning of a project or goal
• reviewed regularly

Adapted from *First Time Manager* by the Ken Blanchard Company.
To set effective goals, it is important to identify **SMART** goals …

- **S** Specific … one goal at a time
- **M** Measurable … in time and quantity
- **A** Achievable … reasonable, but also a stretch
- **R** Relevant … makes a positive difference
- **T** Trackable … allows monitoring of progress

*A goal is a dream with a deadline.*

Napoleon Hill

Adapted from *First Time Manager* by the Ken Blanchard Company.
Goal Setting Questions

Two types of questions are helpful when setting goals:

• Clear – defines the goal and the expected outcomes (the results)

• Compelling – explores how committed the person is (motivation)

Adapted from *First Time Manager* by the Ken Blanchard Company.
Goal Setting Questions

Clear

1. What exactly is the goal or task?
2. What does a good job look like?
3. When does the goal or task need to be accomplished?
4. How will progress and results be measured and tracked?
5. Have we written down the goal so we can review it?

Compelling

1. Have we discussed the goal?
2. Does the employee know I want to help them succeed?
3. Is the goal or task meaningful to the employee?
4. Will working on this goal add or drain energy?
5. Is the goal within the employee’s control?
6. Have I listened to the employee’s response?
7. Do I understand any concerns the employee has?

Adapted from First Time Manager by the Ken Blanchard Company.
Goal Setting Practices

- 43% successfully achieve their goals if they think about them and nothing more

- 64% successfully achieve their goals by writing them down and sharing them

- 76% successfully achieve their goals by writing them down, sharing them, and checking in weekly

Adapted from *First Time Manager* by the Ken Blanchard Company.
Announcements/Reminders
Upcoming OHR Training Sessions

- Introduction to 7 Habits of Highly Effective People – May 7 & 14
- Leadership Conversations for Supervisors – May 15
- Budget and Procurement Processes – May 17
- Sanctuary Tour – May 17
- Speak Up – May 29-31 & June 3

Please contact Stephen Butler at x2521 or sdbutler@Amherst.edu to schedule any of these trainings for your team or department.
Topics for Leadership Conversations

What topics or questions would you want to discuss with your colleagues at future Leadership Conversations?

Please contact Stephen Butler at x2521 or sdbutler@Amherst.edu to schedule any of these trainings for your team or department.
Recent and Upcoming OD Sessions

- **Admissions** – PMP Review and Discussion of the Ratings
- **Custodial Department** – Review the new Self-Evaluation and *Make a Difference* Behaviors
- **Facilities Operations** – Performance Management and Conducting Effective Performance Evaluations
- **Residential Life** – Managing Change and Transitions
- **Spanish Department** – Planning Curriculum Reform

Please contact Stephen Butler at x2521 or sdbutler@Amherst.edu to schedule any of these trainings for your team or department.
Save the Date!

Amherst & You – A Welcome Event for New Employees

• Thursday, June 13
• Wednesday, August 14

Next Supervisory Forums

August 1, 2019
December 5, 2019
Future Meetings

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