LASER

Lehigh All-Staff Employment Rewards ISSUE 21 / MARCH 2010 www. lehigh.edu/~ inhro

Benefits Allocation Review…

What's Next?

The Benefits Allocation Review project is well under way and the side bar at right provides a quick synopsis of what's happened so far. This spring we'll be sharing the findings of last year's faculty and staff benefits survey and focus groups through which we collected lots of data about satisfaction levels, usage, and preferences regarding various types of benefit plans. Information will be disseminated in multiple ways including stem and department presentations, brown bag sessions, and a written report.

Of course, data collection and analysis are only preliminary steps in the review process. Beyond the reporting out on the survey findings, there are three components of the *Benefits Allocation Review* yet to be addressed:

- Develop a comprehensive statement of goals and performance expectations for the benefit program
- Evaluate the effectiveness of the current benefit program
- Develop recommendations to improve the effectiveness of the program within current resource parameters.

If you attended the *Learning Your Benefits* series (part of the *Benefits Education Initiative*), you know that benefit programs have been an integral part of the American workplace beginning in the early twentieth century. Since that time, benefit programs have evolved significantly due to internal and external forces – e.g., competition, labor relations, regulatory compliance, as well as rising costs and resulting cost controls. Additionally, the general tax treatment of employee benefit programs has remained relatively consistent over the years… tax deductions to employers and tax exemptions to employees for contributions to health insurance and tax deferrals for contributions to retirement plans. Today, nearly all organizations above a certain size offer a comprehensive benefit plan as part of their standard compensation package.

June 2007	Formal proposal to Senior Leadership Council
May 2008	Final report from Strategic Thinking Faculty & Staff Working Group
June 2008	Review exempt staff sick leave benefit policy
2008-09 Academic Year	Benefits Education Initiative
May 2009	Faculty and staff benefits survey
Fall 2009	Survey follow-up with focus groups
Winter 2009-10	Preliminary presentation of survey results to senior leadership groups

Benefit Plan Packages

A wide array of benefit plan options have developed over the years, enabling benefit packages to be customized to support strategic goals while at the same time responding to employees' needs and preferences. The *Benefits Allocation Review* project is the first critical look we've taken in at least 25 years at evaluating the effectiveness of our overall benefit structure in meeting the needs of today's faculty and staff members. Lehigh's current benefit package was designed to:

- Protect employees and their families from financial hardship
- Provide for financial security in retirement
- Support the pursuit of higher education by employees and their dependents
- Support staff development and training
- Support work/life balance
- Support faculty development
- Provide savings to employees who elect voluntary benefits
- Support the redevelopment of Southside Bethlehem.

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In This Issue

What's Next?

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Are these goals still valid for Lehigh's current and future workforce? The benefits survey and focus groups provided us with information about what is important to staff and faculty members and about what their priorities are. We received requests for a multitude of benefit changes and additions. If we had no limits on our budget for benefits, we'd be able to fulfill all of these requests – but we do have budgetary constraints. We know we can't deliver everything but we must deliver a benefit program that meets the needs of the majority of faculty and staff as effectively as possible.

Ultimately, our benefit package needs to be aligned with the University's *Strategic Plan* which includes "investing in faculty and staff: a strategic expansion" as one of its four components. Foundation or parallel activities in support of this component include an examination of faculty/staff hiring and compensation. Are there benefit issues hindering our efforts to recruit and retain the best and brightest staff and faculty? Do our benefit plans address the needs of an increasingly diverse workforce? Are we doing all we can to ensure that our faculty and staff have the benefit support that will enable them to focus and do their very best work for the University?

Moving Forward

Moving forward with the *Benefits Allocation Review*, we need to clearly define our objectives – i.e., develop a statement of the goals and the performance expectations for Lehigh's benefit program for faculty and staff, from both an institutional perspective as well as an employee perspective. This statement will be based on information to be gathered about how we can support the University's strategic goals and on the data already collected about the priorities and preferences of our workforce.

In order to measure anything, there has to be a "yardstick" for comparison. Only after a new set of goals and performance expectations are defined can we identify the metrics to assess the effectiveness of the current benefit program. Are we meeting the highest priority needs of our faculty and staff? What elements of the benefit program contribute the most, or least, to the University's strategic plan?

Once we've evaluated the current program based on the stated goals, we can start to identify opportunities to improve the overall effectiveness of the program. And finally, we need to develop recommendations for appropriate changes that can be accomplished within the current resource and budgetary parameters of the University.

Obviously there is still much work to be done! A small team of campus participants is being assembled, including some members of the original survey design team with representatives from the *Employee Relations Advisory Committee (ERAC), Faculty Compensation Committee (FCC), and Faculty Financial Planning and Operations Committee (FFPOC)* among others. **Gary Lutz,** in his role as Vice Provost for Institutional Research, has also agreed to serve on the benefits allocation review project team. Team members will be asked to engage their constituents in the discussion about each of the remaining components of the *Benefits Allocation Review*.

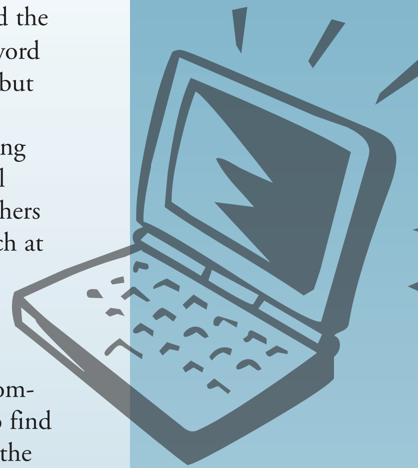
We anticipate that by the end of the current fiscal year, the Benefits Allocation Review Team will be in place and interacting with members of the campus community to define the goals and performance expectations for the benefit program. Once the goals and performance expectations have been established, the team will develop appropriate measures for evaluating the program's effectiveness.

Obviously, this is neither a quick nor a superficial review project. The comprehensive evaluation of the current benefit program against the defined measures will take place in 2011. The results of the evaluation will be the source for recommendations to improve the effectiveness of the program.

If you have questions about the review or future recommendations, you can contact **Toni Lee Febbo**, **Tim Hinkle**, or **Jackie Matthews**.

Are there benefit issues hindering our efforts to recruit and retain the best and brightest staff and faculty? Do our benefit plans address the needs of an increasingly diverse workforce? Are we doing all we can to ensure that our faculty and staff have the benefit support that will enable them to focus and do their very best work for the University?

Performance Management 2010

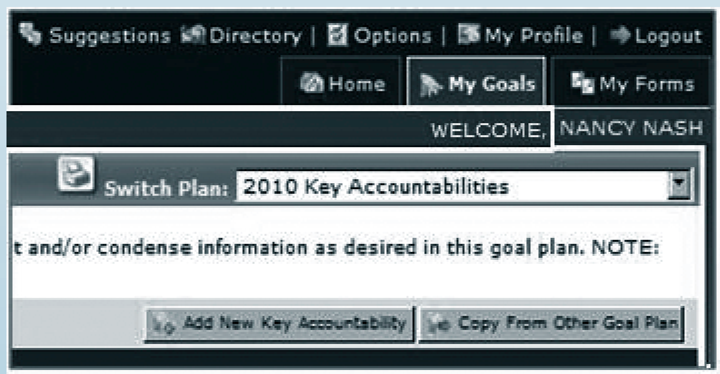


By now, most of the campus community has completed or is in the process of completing the 2009 staff performance evaluations. Whew! Another appraisal period come and gone… or has it? When we introduced the online **Goals→Performance→Success** (*GPS*) tool in 2008, you may recall that we frequently used the word "ongoing" a lot. We may require formal discussion and documentation of performance just once a year, but effective performance management remains an ongoing process.

One of the real benefits of our conversion from the old paper process to an online system is the ongoing access that allows us to enter information throughout the year to avoid the annual performance appraisal crunch time. While some folks have yet to take advantage of the ongoing capability of using the tool, others are already asking about the launch date of the 2010 forms. We won't launch the 2010 forms until March at the earliest. However, you can start entering 2010 information by working in the **My Goals** tab.

Start Entering Information Now

We encourage everyone to try using the **My Goals** tab to track progress on projects, to document accomplishments, or at the very least to note workplace learning programs as they happen. Don't know how to find the **My Goals** tab? When you enter the *GPS* tool, you'll see a "Welcome" greeting with your name near the top right of your screen. Above that, you have at least three tabs… **Home**, **My Goals**, and **My Forms**. Supervisors also have **My Team**, **Dashboards**, and **Reports**.



Once you select the **My Goals** tab, you also want to be sure that you are working in the correct "goal plan." Within the *GPS* tool, everything is called a "goal" and there are separate goal plans for key accountabilities, goals & objectives, and workplace learning. Just below the "Welcome" greeting, look for the drop-down field that is labeled "Switch Plan" (see screen shot). Use the drop-down button [▾] to change from one goal plan to another.

- Go ahead and copy forward your key accountabilities from 2009 to 2010. * Start by switching to the 2010 Key Accountabilities goal plan. Then use the "Copy From Other Goal Plan" button and follow the directions on the subsequent windows that open. Once your key accountabilities have copied forward, you can use the icons to the right of each key accountability to edit or rearrange the order.
- Do you have any large projects or goals that began in 2009 (or earlier) and will continue into 2010? You can copy these forward in the same manner as you copied forward your key accountabilities. Just be sure to switch to the 2010 *GPS* Goals & Objectives goal plan first. You'll probably need to update the support actions to reflect the project steps or milestones planned for 2010. And don't forget to adjust your start and end dates as appropriate.
- Have you entered any new goals for 2010 yet? Use the "Add New Goal" button to enter each goal. When you select this button, a window opens with fields to enter the goal statement and objective. The first field in this window lets you can designate the goal as "performance" (the default setting), "special project," or "developmental" from a drop-down menu. If you aren't sure how to construct a comprehensive goal statement and objective, try the SMART Goal Wizard. You'll find this button to the left of the "Add New Goal" button.

Any 2010 information entered into the *GPS* tool through the My Goals tab will automatically populate into your 2010 *GPS* form when it is launched. If you get interrupted, remember to save what you've been working on to avoid any loss of information. Finally, a reminder that Internet Explorer is still the recommended browser for working in the *GPS* tool. Although Mozilla Firefox has largely replaced Internet Explorer on our campus PCs, we did have a few folks reporting various types of copying and pasting glitches when working in the tool using browsers other than Internet Explorer.

* If you have significant changes in your key accountabilities for 2010, we recommend updating your position description in the PD Tool first. Contact Human Resources at extension 83900 to open your PD for editing. Once your position description in the PD Tool has been updated and approved by your supervisor, contact **Linda Parks**, extension 85195, to do a fresh import of your key accountabilities from the PD Tool to the *GPS Tool* for you.

Can We Talk?

Providing Feedback to Multiple Generations

It's performance appraisal time and questions and requests for assistance have been coming in fast and furious from staff and supervisors utilizing the *Goals→Performance→Success* (*GPS*) online tool. Although the *GPS* tool is available year-round, it appears that some folks haven't been in the tool since last year's appraisal period. If you fall into this group — DON'T PANIC! **Linda Parks** (extension 85195; linda.parks@lehigh.edu) and **Alice Sikorski** (extension 82789; ams404@lehigh.edu) in Human Resources (HR) are always happy to help callers navigate through the process.

In the rush to get the formal annual appraisal completed, it's easy to forget that the goal of the appraisal process is to provide a framework and preparation for a meaningful performance discussion between supervisor and staff member. Ideally, there should be an ongoing dialogue of frequent input and feedback. The *GPS* tool merely provides a means to achieving this ideal. While we strive for consistency in our performance appraisal process, we must also be aware that the diversity of our workforce requires a varied approach to providing input and giving feedback. Generational differences, for example, should be taken into consideration.

Multi-Generational Workforce

Much has been written recently about the current reality of a multi-generational workforce and its impact on communication, teamwork, and style of supervision. Currently, we see four different generations within the workforce with some unique characteristics:

	Traditionalists Born prior to 1946	**Baby Boomers Born 1946 to 1964**	**Generation X Born 1965 to 1980**	**Millennials/Gen Y Born after 1980**
Work Value	Hard work Sacrifice Loyal to employer Respect authority	Workaholics Collaborative Career ladder Question authority	Results-driven Independent Skeptical Non-traditional	Multi-tasking Diversity-focused Respect competency Need structure
Leadership Style	Directive	Collegial	Entrepreneurial	Yet to be determined
Interactive Style	Individual	Team Meetings	Informal	Participative
Communications	Formal Written	In person	Direct Immediate	E-mail Voice mail Texting
Feedback	No news is good news.	Annually. How does this affect my raise?	How am I doing? And make it timely.	Lots and lots of positive feedback.
Rewards	Satisfaction from a job well done	Rewards = money and title recognition	Rewards = freedom, more independence	Rewards = meaningful work
Messages that motivate	Your experience is respected.	You are valued. You are needed.	Do it your way. Flexible "rules."	There aren't a lot of rules here.
Work/Life Balance	Separate lives	Live to work	Work to live	Live, then work
Lehigh's Workforce	5.8%	58.1%	27.8%	8.3%

Can We Talk?

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The given date ranges for each generation may vary slightly depending on the information source. Obviously not everyone fits neatly into these categories. The ranges are fairly wide and each generation is influenced by the generation that preceded it (e.g., our parents, teachers, etc.). Still, the differences between the generations are significant enough that supervisors and employees should take them into account when interacting with each other.

So how do generational differences impact the performance appraisal and discussion process?

- Traditionalists generally appreciate acknowledgement that their contributions are important but tend to shun too much attention. They may be reluctant to share their views within a group but may feel flattered if others privately seek their advice and counsel.
- In contrast, Boomers may see themselves as "stars." They generally place high value on seniority and look for opportunities to work in teams, especially with others who might help them get ahead.
- Boomers and Gen Xers often clash because Generation Xers tend to be skeptical of management and their motives.
- On the other hand, Gen Xers want honest and timely feedback on a frequent basis to assure them that they are on the right track. They like to work independently and to be assigned projects with limited controls.
- While many Gen Xers grew up as "latchkey kids," most Millennials grew up with lots of parental attention.They are used to hearing praise and may mistake silence for disapproval. They want lots of guidance to know what they're doing right and/or wrong. They value a collaborative, team environment and seek mentoring opportunities. They tend to look for work that is meaningful and which serves a "higher purpose."

It's important when documenting performance and participating in performance discussions to recognize the generation differences that may impact working relationships. Being able to identify the different work values and motivating factors helps both supervisors and employees bridge the communication gaps that can occur within the workplace with respect to leadership style, feedback, and recognition.

References for this article include: *"Advice for Leading Multiple Generations," UNH T2 Center, Road Business, Summer 2007, Vol. 22, No. 2*

"Cross Generational Communication: Implications in the Work Environment" presentation (.ppt), Office of Institutional Equity, Duke University, downloaded 12/11/2009: http://www.duke.edu/web/equity/Diversity.htm

Hammill, Greg. "Mixing and Managing Four Generations of Employees," FDU Magazine, downloaded 11/19/2009: http://www.fdu.edu/newspubs/magazine/05ws/generations.htm

"Speaker Shares Advice for Leading Multiple Generations," University of Minnesota, CTS Report, July 2006, downloaded 12/11/2009: http://www.cts.umn.edu/Publications/CTSReport/2006/07/Speaker SharesAdvice.html

The 2010 *GPS* Appraisal Forms Will Have Some Changes!

The 2010 *GPS* forms aren't scheduled for launching until March (or as soon as most of the campus has completed their 2009 staff performance appraisals). Based on user feedback, we are pleased to announce several changes for the 2010 *GPS* forms:

- The "associated goal" fields that currently appear below each key accountability and likewise, the "associated key accountability" field below each goal will be removed. Most folks found these fields confusing and for the most part, just added an unnecessary layer of complexity.
- The numeric overall performance rating will disappear – just the performance descriptor will remain. This change was already implemented so depending on when your form was launched, the numeric overall rating may or may not appear on your 2009 appraisal form. Supervisors and managers will still have access to numeric ratings through use of the Dashboards and Reports tabs.
- We'll be updating some of the introductory language for the various sections of the form.
- When forwarding the form through the workflow steps, the spell check default will be changed to "off" rather than "on" as it is currently. Most folks prefer to use the spell check icon at the top of the form.
- We are planning to request the removal of the overall comment field at the bottom of the Workplace Learning section of the form. Very few people use this comment field and many of those who did confused it with the overall comment field that appears in the performance summary section below it.

As mentioned previously, these changes are the result of accumulated feedback from employees and supervisors using the *GPS* tool. Just as effective performance management relies on timely, constructive feedback, so does the ongoing improvement of the *GPS* tool!

To ask questions or make suggestions, please contact **Linda Parks** at linda.parks@lehigh.edu or extension 85195.

Career Management

Supporting Career Management

Managers are expected to wear many hats. They manage processes and operations within their department. They allocate resources and assign work. They provide the necessary support so that their staff members successfully carry out assignments. To achieve optimum work performance from their team, supervisors must simultaneously coach, mentor, and develop the knowledge and talents of the staff within their area. Staff development is a continuous process of planning, recruiting, evaluating, and building expertise.

Focusing on staff professional development is one example of Lehigh's strategic focus on investing in our staff members to promote their personal as well as the University's success. The final report of the faculty and staff working group of the *Strategic Planning Initiative* identified a number of key goals. The second goal is defined as:

Nurturing Leadership: Develop future leadership in both the academic and administrative arenas to ensure inspired and sustained direction for Lehigh now and the years ahead.

For managers, staff development equates to retention of talent, succession planning for retirements, cross-training for depth, and strategic planning to meet forecasted departmental needs. In most cases, it is more cost effective to build talent from within than to recruit talent from the external labor market. Over 65 percent of Lehigh staff members are in the Baby Boomer (born between 1946 and 1964) or Traditionalists (born between 1925 and 1946) generations. Managers need to be planning for the inevitable knowledge transfer that we will face as staff retire or leave the Lehigh workplace.

Does your team have the right skills and competencies to achieve departmental objectives? As the University's strategic plan continues to be implemented, there will be new goals and challenges at the stem and department levels. Is your team prepared to take on new challenges to accomplish the strategic goals?

The strategies identified for achieving goal success include:

- *Institute leadership transition strategies for academic and administrative arenas, including formal succession plans*
- *Provide for faculty and staff development at all levels and make this a criterion for choosing, educating, and evaluating future leaders.*

Career Management at Lehigh

Managing staff development on an individual basis can be daunting and supervisors might not know where to start. The *Career Management* program at Lehigh University is designed to promote opportunities for staff members to explore and to encourage professional and career growth. This framework creates a foundation for mapping professional development. The message of the *Career Management* program is the cultivation of career planning and continuous opportunities for learning through:

- Understanding what is changing in the world of higher education, at Lehigh University, and within departments and specific jobs
- Enriching and expanding current skills
- Exploring and assessing work interests, skills, values, and preferences
- Realigning career opportunities through individual career development plans
- Evaluating professional development and career mobility options.

However, staff members can't do this effectively without the cooperation and assistance of their supervisors and department/stem leadership. And yet, some staff members experience a lack of support within their departments. Some managers may be hesitant to develop their team members out of fear that individuals may leave for other opportunities. Supervisors need to be open and supportive when an employee's career management goals include changing jobs and making career changes. However, taking an active role in the professional development and career management of staff members helps supervisors to build stronger work relationships and those relationships play a key role in staff retention. The fact is, individuals are just as likely (and sometimes more likely) to leave because of a lack of learning and development opportunities. This is especially the case with Generation Xers (born between 1965 and 1980) as well as the Millennials (born between 1981 and the late 1990's) just entering the workforce.

It is important to remember that the term "career management" is often misunderstood to solely mean job changes such as promotions and transfers. Depending on an employee's interest, a job change may be a desirable aspect of managing one's career, but keeping job skills up-to-date is important with or without a job change. Career management is also about increasing job satisfaction through growth (i.e., gaining knowledge and building expertise) in an existing role. Managers actively support career management by planning and encouraging staff development within their own teams.

The *Career Management* program at Lehigh University provides individual coaching as well as workshops and other programming for both managers and staff members. Here are two of our most popular offerings:

CareerCoaching for Managers™

Coming on **June 8, 2010**, the Human Resources workplace learning team will be facilitating our third *Career Coaching for Managers* workshop. This workshop is a fast-paced, interactive program that provides managers with a menu of ways to develop and grow talent and retain the capable staff in which Lehigh has made such an investment. Supervisors will learn to support a staff team and address current and future staff skill needs by mastering the *Talent Development Model*:

Listen:	Have staff members talking about their skills, interests, and values.
Level:	Have members of your team reflect about their strengths and development needs.
Look Ahead:	Have your team looking at trends, department needs, and the higher education culture.
Leverage:	Have your team analyze multiple career options and develop contingency plans.
Link:	Have your team move to support specific development plans and department staffing needs.

Supervisors, managers, department heads, and division leaders will all benefit from this comprehensive program. Attendees will deepen their understanding of the professional/career development process and how it relates to Lehigh's staff retention objectives as well as long range staff planning.

CareerPower for Staff™

The *Career Management* program at Lehigh encourages individuals to take charge of their own careers. The *CareerPower for Staff* workshop gives employees an opportunity to think introspectively about their current position and to learn more about how their personal goals fit in with their career goals. Through a series of learning exercises attendees answered a series of career-planning questions that will help them map out their next move. The workshop teaches participants how to manage their careers over a lifetime and introduces easy-to-use tools for professional development and career management.

Anyone interested in managing his or her professional development/career, establishing job strengths, exploring and recognizing new opportunities at work, and setting professional development and career goals would benefit by attending. We hope managers encourage their staff members to attend. Our fifth workshop was held in January and will be offered again in the Fall.

To register for either of these workshops, go to www.lehigh.edu/HRtraining. If you are interested in individual coaching or have questions about the programs themselves, you can contact **Linda Parks** at linda.parks@lehigh.edu or extension 85195 or **Judy Zavalydriga** at jaz308@lehigh.edu, extension 83897.

Lehigh University
Human Resources
428 Brodhead Avenue
Bethlehem, PA 18015-1687

Q&As

Q: What are the changes to *GPS*?

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Glossary

Baby Boomers
Name given to the generation of employees born between 1946 and 1964. These employees make up the majority of today's work-force but are beginning to retire.

Benefits Allocation
The distribution of a fixed budget across an array of individual benefit plans.

Career Management
A combination of structured planning and the active management choice of one's own professional career.

Development
The acquisition of skills and knowledge through a planned process of building expertise through structured programs, mentoring, job-shadowing, cross-training, and other experiential activities.

Generation X or Gen Xers
Name given to the generation of employees born between 1965 and 1980. These employees are the second largest group in today's workforce.

Generation Y or Millennials
Name given to employees born after 1980. Millennials are a growing segment of today's workforce.

Goal
A projected state of affairs that a person plans or intends to achieve.

Success Factors
A set of actions or behaviors that define how work and results should be achieved for each job family.

Traditionalist
Name given to the generation of employees born before 1946, sometimes called "Veterans," the "Silent Generation," or "Radio Babies."

Where to go for more information...

- Contact Human Resources at extension **83900** (inhro@lehigh.edu)
- Visit HR's Website at www.lehigh.edu/inhro
- Visit the HR channel on the Campus Portal