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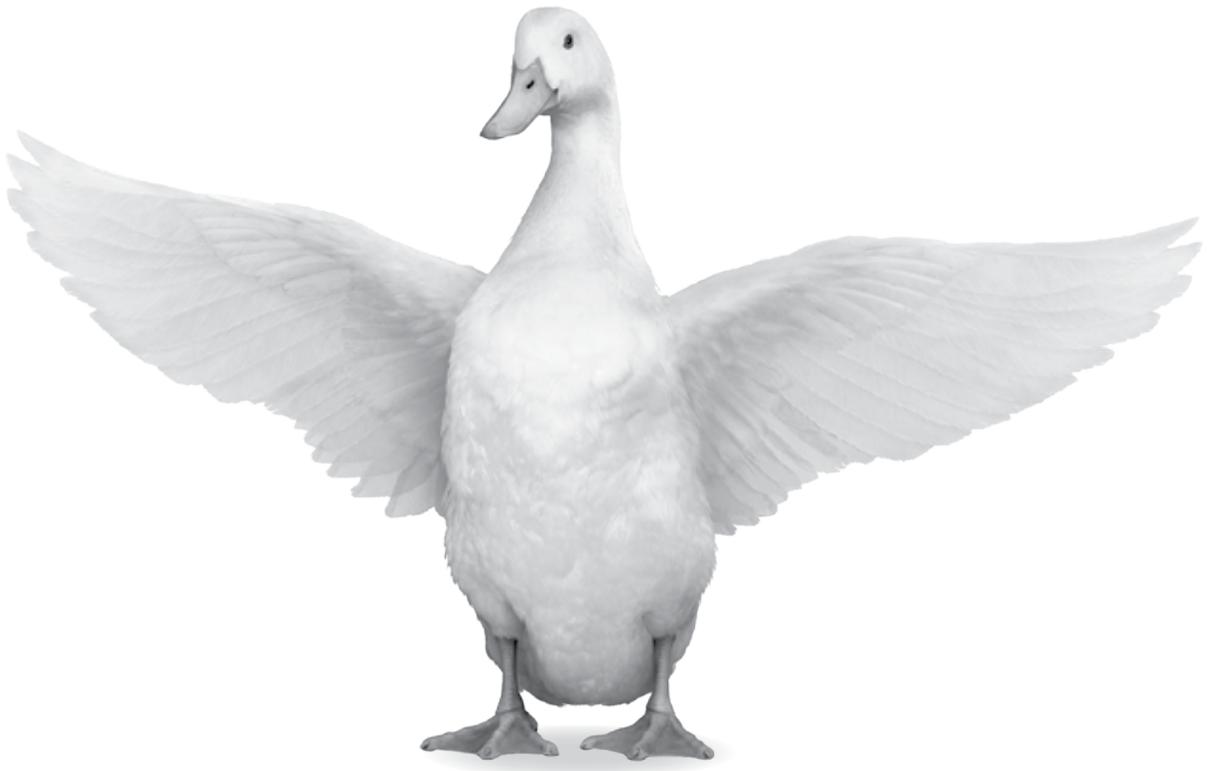
Volume 4 ♦ May, 2014



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SHRM ALABAMA STATE COUNCIL

Greetings Alabama HR Professionals and Supporters,

It is my pleasure to serve as your 2014 Alabama SHRM State Council Director. We're off to a fantastic start this year!!!

We began the Council year with a simple, yet strategic goal of advancing and supporting our state HR professionals. Annually, we hold a Leadership Conference in January to discuss the vision and direction of the Council and the chapters that we support. We use this as an opportunity to properly align all initiatives (State and local chapter) in a manner to ensure remarkable and measurable results. Our Council Leadership, CLA Directors, and Chapter Presidents presented a detailed plan to support the chapters in various focus areas. I am proud to report that we are making notable progress in meeting our goals.

One key initiative added this year was a statewide focus on improving wellness through workplace initiatives. As we all know, employee wellness is an important topic, but one this is especially relevant to us in the state of Alabama based on the most recent statistical results. I am proud to announce that certified wellness expert, Elisabeth Doehring, has joined the State Council to lead this program. She is working directly with the local chapters, through appointed Wellness Ambassadors, to roll-out this transformational program. The chapters are in full support of this initiative and we ALL are excited to hear the final results at the end of this year.

The entire Council is hard at work. Established state initiatives such as Certification and the SHRM Foundation, continue to see notable progress. We are continuing a robust College Relations program in 2014 and are quite fortunate to be viewed as national leaders in Governmental Affairs thanks to Juanita Phillips and Pam Werstler, Co-Directors in this area. Juanita and Pam consistently provide feedback to local, state, and national legislators regarding the human resource perspective on proposed workplace related legislation.



The signature event for the State Council annually is the Alabama SHRM State Conference. This event serves as our main revenue generating project - the funds received greatly support many of the aforementioned HR programs and initiatives at the State and local chapter level. The conference team has planned a stellar event this year - this conference has a special wellness theme. Special thanks to the entire conference

team led by Melissa DeVore and Mike Bean.

The last Council initiative that I want to discuss is actually the one you are currently reading - the HR Magazine. Three years ago, we wanted to create a vehicle to share relevant, thought-provoking human resources related information with every HR professional in the state of Alabama. This publication gets better and better each year with special thanks to several people: the sponsors and advertisers, The Anniston Star (our printer), this year's editor - Steven Smith, our advertising executive - Rosie Herdt, and the magazine advisor - Paula Watkins. Thanks to you all for your hard work and dedication to this initiative.

As you can see, the Alabama SHRM State Council is quite busy - we are dedicated to our profession and to all of you. To learn more about the Alabama SHRM State Council, please visit our website at <http://al.shrm.org>. I look forward to meeting many of you at our annual state conference.

Andrea S. Goolsby, PHR
2014 Alabama SHRM State Council Director



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We are a not-for-profit professional organization for Human Resource practitioners in and around the Decatur area. Founded in 1971, the organization serves its membership by providing professional development opportunities and information relevant to the ever changing environment of human resource management. We include individuals who are full-time HR professionals and other individuals who have HR responsibilities as an integral part of their job. We serve the community through public service activities and support in the areas of education and workforce development.

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Meet the Writers

Mary Ila Ward, SPHR, GDCF is the owner of Horizon Point Consulting, Inc. whose vision is to take people “Beyond Work” by meeting the mission to provide talent management and career coaching and consulting that leads to a passionate and productive workforce. This purpose includes helping companies develop and implement talent management systems that are grounded in organizational strategy and results. In addition, the company provides career and college coaching and career transition services to individuals as well as Career Development Facilitator Training to career development practitioners through NCDA. Mary Ila received her B.S. in Commerce and Business Administration from the University of Alabama and her Master’s in Industrial and Organizational Psychology from Middle Tennessee State University. For more information about how the company helps take individuals and companies “Beyond Work,” visit www.horizonpointconsulting.com or contact Mary Ila at miw@horizonpointconsulting.com



P. Andrew (“Andy”) Laird, Jr., is a partner at Starnes Davis Florie LLP in Birmingham, Alabama. Andy’s practice is devoted to civil litigation and regulatory compliance. He enjoys a diverse practice including workers’ compensation, commercial disputes, mining liability, and construction defect litigation. Andy is an active member of the Alabama State Bar, The Mississippi Bar, Birmingham Bar Association and Defense Research Institute. He is admitted in all state and federal courts in Alabama and Mississippi, as well as the U. S. Court of Appeals for the Fifth and Eleventh Circuits.



Ben Eubanks is an HR professional, speaker, and author living in Huntsville, AL. During the day he works as the HR Manager for a government contracting firm providing training services to the U.S. military and other commercial organizations. Ben is a regular volunteer with the North Alabama SHRM chapter. Ben also provides regular insight and information on HR, recruiting, and leadership topics at his website, upstartHR.com.



Elisabeth A. Doehring, CWWPM, WELCOA Faculty, GPHR, PHR is President/Principal North American Center for Worksite Wellness (NACWW)[™]. In addition she serves as Wellness Director for the Alabama State SHRM Council. Elisabeth is team-leading “Wellness Alabama”.



Carin Burford is a Shareholder in the Birmingham office of Ogletree, Deakins, Nash, Smoak & Stewart, P.C. Ms. Burford practices employment law with a focus on leave issues involving worker’s compensation, the ADA, and the FMLA.



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Paula Watkins, SPHR Paula is V.P. of Corporate Human Resources for Lyons HR and over 8,500 employees. She received her B.A. from UCLA and M.A. from the University of Missouri-St. Louis. Paula is past Director of the Alabama SHRM State Council and served on a national Board of Governors for SHRM. She continues to support her local chapter and the State Council by holding a variety of positions. She is Chairman of the Board for the Anniston Museum Complex; is a graduate of Leadership Calhoun County; served six years on the Chamber of Commerce Board; and is an active Rotarian. Paula has been honored by the Girl Scouts of America as Business Woman of the Year and three times by the Calhoun County SHRM as Human Resources Professional of the Year and with a Human Resources Lifetime Achievement Award.



Jennifer Minto, SPHR A graduate of the University of South Alabama with a Bachelors of Business Administration. Certified as a Senior Professional in Human Resources (SPHR) 2009-present. Fifteen years of comprehensive HR experience and expertise in industries including county government, professional engineering, medical staffing and office management, mental health and manufacturing. Served as President for Baldwin Co SHRM in 2012 and currently serves as District Director 4 for the Alabama SHRM State Council.



Kristina H. Minyard, PHR is an HR professional with a specific passion for recruiting. Her experience has allowed her to learn many different business practices and partner with multiple HR departments to create win-win situations for clients and employees. Kristina is an active member on the NASHRM board and HACEPD (Huntsville Area Committee for Employment of People with Disabilities) as well as a SHRM national member. Connect with Kristina on twitter @HRRecruit and see what else she has to say over at hrpockets.com



Rebecca Dubach and is currently a student at Athens State University. She will be graduating with a Human Resource Management degree in May 2014. Before going to Athens State University, she attended Calhoun Community College and received a degree in Business in General Studies. At Athens State University, she is a member of the Student SHRM Chapter and the treasurer for the Student Government Association. She is also a member of National SHRM. While attending Athens State University, she was awarded Founders Queen in 2013 and awarded Ms. Athens State in 2014. Rebecca is currently employed at National Packaging as their Human Resource Assistant.



Kirsten Stutts, PHR, is currently employed as the Human Resource Manager at PPT Solutions, Inc. PPT provides software engineering and IT support services to government and commercial organizations. Kirsten has been in the Human Resources field for over 5 years, holds a BS with a double major in Management and Human Resources from Athens State University and is pursuing an MBA from the University of North Alabama. She has been a member of SHRM and NASHRM for over 4 years.



SHRM Foundation's Support for the HR Profession

I have been a member of North Alabama SHRM (NASHRM) for several years, and this year I finally decided to volunteer. In June, I was invited to join the NASHRM Board as their SHRM Foundation Director.

What is the SHRM Foundation Director you might ask? Well, I didn't know either. Luckily SHRM has a webpage called the Volunteer Leaders' Resource Center (VLRC) dedicated to answering many of your questions about your new volunteer role and offering a host of resources for you to utilize. The link for this valuable resource can be found at <http://www.shrm.org/Communities/VolunteerResources/Pages/default.aspx>

Really, the SHRM Foundation Director role serves two purposes:

- To raise money for the SHRM Foundation, and
- To educate people about the Foundation and how it supports the HR profession.

Did you know that . . .

- You can apply for a scholarship to pay for your tuition towards an HR degree or certification?
- The SHRM Foundation offers complimentary resources such as DVDs, Effective Practice Guidelines, and Executive Briefings that you can use personally or as a program for your Chapter?
- When used as part of a 1-hour educational session, the DVDs even qualify for HRCI credit!
- SHRM Foundation is also the leading funder of HR research!

I didn't know any of this before I accepted the role of SHRM Foundation Director. So what can you do to get more connected and involved?

- You can check out the resources that the SHRM Foundation has to offer! Here is the website: <http://www.shrm.org/about/foundation/Pages/FoundationHome.aspx>
- Support the SHRM Foundation when your local chapter has a fundraiser or donate to the SHRM Foundation directly; and
- Volunteer to be a part of your local chapter of SHRM. You may get more out of the experience than you think!

I think people will benefit from knowing more about the SHRM Foundation and how it helps us all as HR professionals and as an entire profession.

Kirsten Stutts



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TVC- SHRM Professional Chapter
Student Capitol Hill
Scholarship 2013

**Building
&
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ADVOCACY:**

*Connecting HR professionals,
congress leaders, and HR students*

By Rebecca Dubach

I was given a chance to win the TVC-SHRM Capitol Hill visit scholarship, to go lobby for Human Resource rights with a team of professional Human Resource Management managers, directors, and other professionals. With this scholarship came qualifications. The qualifications that you had to meet consisted of being an Athens State University Human Resource Major in good standing, have a minimum of a 3.0 GPA overall, and also to be an active member in the student SHRM chapter at Athens State University.

With this scholarship opportunity there was an essay that consisted of three questions that you had to answer. The questions that I had to answer pertaining to the scholarship consisted of what does legislative advocacy in Human Resource mean to me, how would accompanying the TVC-SHRM on the annual Capitol Hill visit to meet the State Representatives and Senators benefit me and the pursuit of a career in HR, and also what could I discern from this experience that will allow me to be better in the community and corporate citizen.

This was a very competitive scholarship. After waiting about a week, I finally received an e-mail stating that I was chosen to go on the TVC-SHRM Capitol Hill visit. I was so excited that I would be given the chance to go lobby in Washington, D.C. with Human Resource professionals about HR policies.

With going on the TVC-SHRM Capitol Hill visit, there are several significant takeaways. Going on this trip gave me the opportunity to embrace and appreciate the role of HR advocacy even more and to learn more about the political process and how it works. This trip gave me a great opportunity to

“ This trip gave me a great opportunity to advocate on behalf of SHRM and the HR profession and had a real impact on the public policy debate involving critical HR issues. ”



“ One of the biggest significant takeaways from this trip was interacting with the senators and representatives. Just to see the sincere interest that the senators and representatives have in the HR advocacy issues that were presented to them meant a lot to me. ”

advocate on behalf of SHRM and the HR profession and had a real impact on the public policy debate involving critical HR issues. With going on this trip, I learned how important it is to network with Human Resource managers, directors, and HR professional staff. This trip has given me a broader understanding of HR profession, HR specialist and HR professional staff. I have learned so much in all my classes at Athens State University about HR issues and case studies but to be with HR

professionals and hear what these professionals have to deal with on a daily basis in the workplace really put in perspective of what it will be like when I get a job in HR. Going on the Capitol Hill visit really gave me the appreciation for diverse perspectives on HR advocacy issues. One of the biggest significant takeaways from this trip was interacting with the senators and representatives. Just to see the sincere interest that the senators and representatives have in the HR advocacy

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“ With going on the Capitol Hill visit, I heard tons of war stories and practical lessons from all of the professional HR managers, directors, and the other professional staff. It really put in perspective on what really goes on in the workplace. ”

issues that were presented to them meant a lot to me. With the senators and representatives, they were aimed at being joint problem solvers on relevant issues. This really meant a lot to me that the senators and representatives took time out of their busy day to talk to HR professionals about issues that they are facing.

There were two main topics that the HR professionals talk about to the senators and representatives on the Capitol Hill visit. The first topic was the Immigration Reform Control Act (IRCA). With lobbying for this HR policies, it was about how SHRM and ACIP (American

Council on International Personnel) believed foreign born talent complements the U.S. workforce and how employers recognized the importance of family unity and contributions of foreign-born talent. The second topic that the HR professionals talk about was the problems and solutions for E-Verify system. HR advocacy is aimed at enhancing the E-Verify system by eliminating the I-9 form since this form is a paper documentation that is at risk for identity theft, forgery, and alteration. The goal is to create a fully electronic verification system that integrates the paper-base Form I-9 into the E-Verify system and



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moves towards a more secure system.

With going on the Capitol Hill visit, I heard tons of war stories and practical lessons from all of the professional HR managers, directors, and the other professional staff. It really put in perspective on what really goes on in the workplace. I have read tons of case studies in school about issues that went on in the workplace but to actually hear from a HR professional about issues that is going on in their workplace made me realize what I will be getting to deal with. This trip has made me realized how excited I am that I have chosen HR as my major. By going on the Capitol Hill visit, I have found that there are opportunities for advocacy in SHRM member advocacy, SHRM advocacy team (A-Team), state and local resources, federal resources, legal reports, and HR issue updates.

From going on the Capitol Hill visit, I have learned a tremendous amount about HR advocacy. I have found out that the SHRM getting involved web page and how it is important as an HR professional to be able to access this page to see how one can get involved. This trip has made me realized how important networking is. I was a member of the student SHRM chapter at Athens State University and a member of National SHRM before going on the trip to Capitol Hill. By going on this trip, it has made me really realized how important it is to stay connected and involved with my student SHRM chapter at Athens State University and with National SHRM. With being involved and staying connected with my student SHRM chapter and with National SHRM, it will only benefit me in my professional career as being a Human Resource Manager. There is a Thomas Jefferson quote on the SHRM webpage and it says, "America is not governed by the majority, but by the majority of those who participate." This quote says it all, as professionals we have to stay connected and involved. This trip has left a lasting impact on my life and I am so thankful to be given this opportunity.

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BEYOND

Wellness
to Wellbeing:

Don't Pick Up The Wrong Dog

Fostering Individual and Company
Wellbeing through Employee
Selection and Development

By Mary Ila Ward

Ever picked up the wrong dog from the vet? Brought it home and left it, not realizing the dog you brought home was not your dog?

As a teenager, I walked into our home after school to find that one of our dogs had the other one backed into a corner in what looked to be a mad standoff. This was quite unusual given our dogs always got along quite well and most of the time, greeted the arrival of someone with tails wagging.

Upon closer inspection, I realized that the dog that was cornered, while in fact white, like our dog, was smaller and had a pink bow in its hair. Our white dog was a boy, and our family is not prone to put bows on a dog. I got the larger dog out of the way, picked up the small trembling dog, and confirmed that it was in fact, a girl. The pink bow was not a mistake and the dog was not our dog.

I called my mother and asked her why there was a foreign dog in our home. Confused, she didn't follow what I was saying. I described the dog that was there and waited. Silence. "I was in a huge hurry and I must have picked up the

wrong dog," she said. "I dropped it off at the house without a second thought and headed to another appointment." While you may wonder what kind of vet lets you go home with the wrong dog, my mother was so busy she had failed to notice or even care to notice that the dog she checked off her list to pick up, was in fact, not the right dog and had actually added more to her to-do list.

This humorous, yet pointed story, came back to my mind several years later, when as a new business owner and a new mother, I was running around like a chicken with my head cut off, doing nothing well. My mom, source of wisdom that she is (she must have learned from the dog incident) told me "Honey, saying no to something is saying yes to something else."

You see, I had taken on too much, mainly by picking up a client that was outside the scope of my mission and purpose, and they were draining the life out of me. I was about to pick up the wrong dog; or maybe I already had.

While my "wellness" might have been fine in terms of my physical health (being very much in tact as all my vitals and weight were fine), my wellbeing was crumbling. Despite my craziness, I was taking time to attend to my physical health through exercise. If I had continued in my

“ I’m sure you’ve seen the employee in the same boat, or maybe you’ve been there before. You’ve picked up the wrong dog and you’re too busy to notice and your performance is suffering. You’ve taken on too much and your wellbeing has plummeted, ultimately affecting your work. ”

current state, my “wellness” probably would have tanked too, exercise or not. Everything was already on the downhill slide because it was affecting my work and it was affecting my family.

I’m sure you’ve seen the employee in the same boat, or maybe you’ve been there before. You’ve picked up the wrong dog and you’re too busy to notice and your performance is suffering. You’ve taken on too much and your wellbeing has plummeted, ultimately affecting your work.

As HR professionals, it seems obvious that people’s wellness, implying a focus on physical health, impacts our bottom-line in terms of healthcare costs and employee absenteeism rates. We all want to be able to put programs in place that impact the bottom line. But, as research suggests, one’s physical health is impacted by one’s entire wellbeing. In addition, wellbeing coincides with employee satisfaction, which increases productivity and performance on the job - something we all desire to maximize in our profession.

What do we do to promote wellbeing, not just wellness or physical health, by promoting and supporting the physical, emotional, spiritual and mental health of each individual?

I go now back to the words of wisdom, “Saying no to something is saying yes to something else.”

We help our current employees determine their purpose and live that purpose through the work that they do. We select employees who align with our company purpose and therefore are able to focus, maintain their wellbeing, and increase company performance.

The best performing companies are able to get the right people on the bus and then get them on the right seat on the bus, a place where they can fulfill their purpose, as Jim Collins points to in his book *Good to Great*.

In order to focus on purpose, simplifying a step-by-step process may be the key:

Identify the personal mission of an individual through a person’s talents, passions and values (or in HR speak, their Knowledge, Skills, Abilities and other characteristics- KSAOs)

Set goals around this mission

Eliminate things that do not contribute to the mission and goals

Form accountability relationships to foster focused living

A true wellness example might first help to illustrate this process. Part of a person’s mission may be to live a “healthy” life. Goals around this mission may be to lose 30 pounds in 2014 by exercising three days a week and maintaining a 2000-calorie per day diet. Another goal may

“...as research suggests, one’s physical health is impacted by one’s entire wellbeing. In addition, wellbeing coincides with employee satisfaction, which increases productivity and performance on the job - something we all desire to maximize in our profession.”



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include quitting smoking in 2014, which corresponds with setting goals and eliminating things that do not contribute to the mission. To help further living this part of a person's mission, they may engage their spouse in the same type of activities to foster accountability.

An individual's employer may also serve as an "accountability and motivating partner" as well by providing discounted gym memberships, facilitating a support group for smoking cessation and providing incentives for participating in programs like Scale Back Alabama.

It seems pretty easy to connect the dots to this process when we just focus on wellness. But what about fostering this process with other components of wellbeing - like mental, spiritual, and emotional health that seem harder to identify and harder to develop programs around at the company level?

Companies can do this by:

Selecting the right people

Developing the right talents in those people

Selecting people whose talents passions and values, or KSAOs, fit with organizational needs contributes both to the organization and individual's wellbeing. I think at one point in life, everyone has been in a job that was not a "fit" similar to how I had picked up a client that was not a "fit". This caused my head to spin. I personally was not at my peak in this role, and therefore my performance was not at an optimal level.

Some people might call this selection process "mapping" for cultural fit, which is true, but it goes beyond just company fit to an individual job fit. An HR professional can ensure that they are on the right track of selecting right by:

Mapping out the required KSAOs for a position through job analysis, paying particular attention to those "other" characteristics that may be harder to define, but play a large part in driving wellbeing for the person and the company.

Developing clear, concise job postings based on the KSAOs for the position so people can self-select if they are a fit for the role.

Developing clear selection criteria through assessments, interview formats and/or job samples to ensure that the person matches with what is needed for the job in terms of both skills and personality. Depending on the role, having someone work in the position for a day or week to assess fit may be a positive avenue to take in order to determine if the person's purpose aligns with the company's purpose for the role.

In terms of developing current employees using the model, developing internal managers and/or outside coaches to help foster the development process at the individual level is critical. The process of developing missions and goals and driving accountability is an extremely individualized process, and each manager needs to be able to develop his or

“ The process of developing missions and goals and driving accountability is an extremely individualized process, and each manager needs to be able to develop his or her staff members in a way that connects company purpose to individual purpose, thus driving wellbeing at both levels. ”

her staff members in a way that connects company purpose to individual purpose, thus driving wellbeing at both levels.

Walking employees through the four-step process described above can help reach this goal. This process can help employees (and yourself) eliminate things that aren't important so that you can actually avoid the distractions that lead to picking up the wrong dog in the first place. Or maybe the purpose discovered through this process helps you realize the dog just needs to go, period.

Consider a person I talked to a few months ago that said he spent, on average, 32 hours of his 40-hour workweek in meetings. That left just eight hours to get things accomplished that ended up on his to-do list from all those meetings. Obviously, he wasn't getting too far on his to-do list, and when he did manage to check things off, he was working on the weekends. His wellbeing was tanking.

What if this person walked through the four-step process on his own, or at the prompting of his manager, and was able to discern the true purpose in his role? This would go back to having a good job description by mapping out critical KSAOs for the role. How effective were those meetings truly contributing to the purpose he was hired for? By focusing on what value he brings to the company, and eliminating half of those meetings from his calendar, there is no doubt his wellbeing would increase and his productivity would increase.

You can decide which one actually comes first; the wellbeing or the productivity. Either way, our role as HR professionals is to impact company success through people. Focusing on wellbeing by focusing on the entire person will do just that for us.



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COMPANY CULTURE

makes the



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go round

By Jennifer A. Minto, SPHR

Merriam-Webster defines culture as a “set of shared attitudes, values, goals, and practices that characterizes an institution or organization”. As you are certainly already aware, every company has its own unique culture. Consider the following examples:

Company A - Corporate driven; professional dress; manners are required. Floors are carpeted; walls are white wash and covered with framed slogans regarding their industry. The people are cordial but never really get to know one another. Everyone comes to work, does their job and goes home. The company is profitable (or its not) but no one is certain because financial information is kept close to the chest and certainly not shared outside the Board room.

Company B - US division of a larger organization; professionals employed but not uncommon to see them dressed in khakis and polos; men chew and spit tobacco into Styrofoam cups leaving them on tables and desks for the cleaning crew to discard. Floors are concrete; walls are painted a bright solid color and covered with thumbtacked posters. The people are genuine - often times friendly and even sometimes rude (depends on the day). Everyone comes to work, spends unproductive hours between offices talking about fishing and golfing, refilling their coffee cups and making their rounds. Work gets done sporadically throughout the day but most stay late to finish up tasks that got delayed from the morning camaraderie. The company is profitable (or its not) and everyone is well aware from the belly laughs and high-fives or the bellowing strings of profanity echoing the halls.

Company C - Locally owned; professional dress is taboo - jeans, shorts and t-shirts are not only the norm, they are expected. Floors are covered

in worn carpet, walls are paneled - charts, maps, and white erase boards can be found in every office. Executive meetings held in offices quickly migrate outside to enjoy the weather or have a smoke. The people are quirky but friendly - always trying their best to make others feel at home. Everyone comes to work, meets briefly for a 5 minute "to-do-today" meeting, and goes to their respective offices to get it done. The company is profitable (or its not) and everyone is well aware from the weekly meetings held to discuss each department's progress (even accounting, gasp!) Complete transparency is expected.

Are any of these companies better than the other? As an HR Manager, is it easier to manage one culture over another? Or have we learned to adapt to our environment regardless of the culture? I would propose it be the latter. HR Managers are by far the most adaptive, chameleon like professionals I know.

Ask yourself this - Could you take a Branch Manager at a bank and put him/her in an Operations position in manufacturing? Sure, you could. The skills to manage bank employees - setting expectations for upselling, maintaining accuracy and evaluating performance - are not that different than those required to manage manufacturing staff. But would it work? Would he or she adapt to the coarseness of a manufacturing environment? Would it be a good "fit"?

Now take an HR Manager from a bank and

“ Ask yourself this - Could you take a Branch Manager at a bank and put him/her in an Operations position in manufacturing? Sure, you could. The skills to manage bank employees - setting expectations for upselling, maintaining accuracy and evaluating performance - are not that different than those required to manage manufacturing staff. ”

move him/her into an HR role in manufacturing. It is much more likely that he or she would integrate into the culture just fine (though it may take some time and many after work cocktails!). An HR Manager's business is people.

People, regardless of culture, want the same things: Respect, Appreciation and Reward for a job well-done. A good HR Manager adapts their style to the environment in which they work. They research, they observe, they collaborate and they acclimate to each organizational culture with seamless ease and professional savvy.

How, you say?

Through ADDIE.

Who?!

Not who, but what - Analysis, Design, Development, Implementation and Evaluation. And so I learned that after all-night cram sessions and numerous hours studying HR terminology, laws and theories to survive college, there was something that truly did apply! While ADDIE has typically been utilized for training programs, what better time to implement this system than while learning a new culture?

And so the fun begins:

Analysis - What are the norms? Professional dress? Khakis and polos? Jeans, shorts and t-shirts? How do the people interact with one another? Are they quiet and cordial? Are the sounds of belly laughs or profanity indicative of the day ahead? Are the people more concerned about getting along than getting it done? Is there a structured

management system in place? What do the employees value about the culture? What changes would they like to see?

Design - You begin to understand the inner workings of the culture. You take note of the quirks, the tone and volume of communications both verbal and written. You put together your plan on what's expected and you begin to adapt.

Development/Implementation - Like a chameleon, you change your high heels and don wedge sandals. One day you throw caution to the wind and break out the flip-flops! You change your professional, "nothing but business" communication style and begin to let little details of your personal life arise. One day you throw caution to the wind and you just tell it like it is! You can see the finish line; you are quickly becoming "part of the group". The company culture is now your new normal.

Until.....

Evaluation - The day you arrive to the Executive meeting in shorts and everyone else is buttoned up to the gills with starched shirts and crisply ironed slacks. And what does the professionally savvy HR Manager do? You adapt. After a late night hitting the best professional dress stores, you arrive the next day dressed to the nines!

And so my friends, back to my hypothesis proven herein to be true - HR Managers are by far the most adaptive, chameleon like professionals I know. An HR Manager's business is people. And HR Knows People.

“ People, regardless of culture, want the same things: Respect, Appreciation and Reward for a job well-done. A good HR Manager adapts their style to the environment in which they work. ”

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GEN Y

Myths, Truths, and Why it Doesn't Matter

HR professionals can't turn around today without running into a message on the importance of working around the differences of Millennials.

However, one of the key responsibilities of the human resources department in any organization is preventing staff from categorizing others or using non-work related attributes to describe individuals. What gives?

By Ben Eubanks and Kristina Minyard

Okay, so we understand that for purposes of recruiting and engagement, it makes sense to try and appeal to specific demographics as a strategy. But it's also important to understand the implications of this incessant focus on generations in the workplace and how it affects our organizations overall.

Taking a Step Back

Let's define Millennials using this quote from Mashable.com:

Generation Y, also known as the Millennial Generation, are the demographic cohort following Generation X. There are no precise dates for when Generation Y starts and ends. Commentators use beginning birth dates ranging from the early 1980s to the early 2000s (decade).

Using that frame of reference, you can go ahead and lump everyone in your office up to age 35 into this group. Now, it has been a common occurrence in recent years to do one of two things when it comes to this group--criticize or submit. Let's explain.

Criticize-Look at those Millennials. They don't know what they're doing. Let's stand back and critique every action they make, because it's obvious that they are entirely clueless about how this business works. They don't want to listen, so they'll learn things the hard way.

Submit-Look at those Millennials! They are the best and brightest generation yet. Let's bend over backwards to appeal to them! We'll talk like them, act like them, and do our best to alter our organization to be Millennial-friendly.

We posit that neither of those hard line options is the correct path, nor in fact is a blended approach arguably the best. It's

easy to jump on the bandwagon and criticize people, but what if the conversation shifts to Asian females or Hispanic males? Would we let employees and others around us generalize and rattle off stereotypes about those specific demographics? We bet that you would not.

In order to shed light on both sides of the issue, we will go through a point/counterpoint discussion of some of the particularly well-known items on list of commonly held beliefs regarding the Millennial generation.

A Few Myths/Truths About Millennials

They need consistent praise and feedback on their work.

Kristina: They do need consistent praise and feedback on their work, so give it to them. You would give your dog water when he needs water right? Well, same thing. This isn't a battle between generations, because I'm sure you give the other generations what they need as well, right? Meeting the needs of your Millennials does two things: increases their productivity and enhances their experience and the company benefits from both of these things!

Ben: If you walk through your workplace, you would be hard pressed to find an individual that would admit to being totally disinterested in receiving praise and feedback regarding their work. Someone just getting into the workforce (as many Millennials are) needs that critical feedback early in their career to help learn from mistakes, figure out what works, and develop a foundation of skills and knowledge to grow their career.

This has nothing to do with Millennials and everything to do with someone new to the workforce.

But they are so entitled and lazy.

Kristina: You say entitled, I say no way. You say lazy, I say resourceful. This mirage of entitlement happened when the Millennials came straight out of the gate with new ideas and time saving shortcuts that they wanted to implement in your day-to-day procedures to make you better at your job. What happened next was the older generations struck back, telling your Millennials that they hadn't done their time yet and they just didn't get how things work in the "real world." So the wounded Millennials went back to their desks and kept their opinions to themselves, only implementing shortcuts and useful gadgets to their own work and not flashing them in your face anymore.

The Millennials aren't sitting around tapping their toes and crossing their arms feeling entitled and waiting for you to realize they are due an opinion, they learned their lesson and have decided to speak up when spoken to in order to avoid offending you, not because they feel they are entitled to a seat at your table.

Lazy? Not a chance. Millennials have been tinkering with technology that works faster, harder and better than the technology the other generations are familiar with, and they know the ends and outs of all of them. They are using those shortcuts to get work done.

Ben: Again, this is my soapbox, but consider the staff members that make up your organization. You will find some of all ages, genders, races, etc. that have an element of entitlement and laziness. If you're running into

that problem, it speaks to your hiring practices--are you properly vetting talent to find the best and brightest, with methods that are based on evidence and data or a "gut" feeling?

Just because someone is young doesn't mean they are lazy any more than it implies they are going to like chocolate or play a guitar. I have worked with 50-somethings that were incredibly entitled and 20-year olds that were humble, deferential, and dedicated.

They're always connected and can't survive without technology.

Kristina: Back away from their smart phones and no one gets hurt! The Millennials learn through technology. They research through technology. They connect with people through technology. Lets face it though, they can survive without technology, they just don't want to (because they don't see the value in surviving without it).

To Millennials they just view it as using their resources wisely, what you don't like is that they can access their social media accounts through their technology. You make them unplug from technology while they are at work and you change the dynamics of the relationship.

Have you ever taken a personal phone call at work? A Millennial checking their Instagram to see how many people have liked their most recent photo is their equivalent to the personal call your older generations get at work. Oh by the way, they can probably check their online stats faster than you can get off the phone, too.

Making jokes that they can't survive without

“Keep in mind that many of these stereotypes mentioned above are not new. They have been repeated with every generation entering the workforce, because many of those characteristics are more applicable to age instead of a generation.”



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technology just shows them you don't understand them (or technology) and makes you sound archaic. Embrace it for the good of your workforce, if you make them unplug you will see a change in their dedication to your workplace.

Ben: I was meeting with someone recently, providing some support as the person was trying to break into the local job market after college (by definition, this person is a Millennial). During the conversation, they kept pulling out their phone to check messages and emails. I point-blank told the person that it was a rude gesture and that they needed to cut it out if they wanted anyone to take them seriously. It had nothing to do with the fact that they were a Millennial; it had everything to do with them never working in an actual environment where someone had the heart to tell them the truth.

I'm a big fan of telling our staff (of all ages, mind you) that I don't care if they want to check their Facebook as long as they are getting their work done.

Oh, and guess what? One of the fastest growing segments on Facebook in the last year is the 65+ age group. It's spreading, so stop being afraid of technology and start learning to understand and use it.

They aren't loyal, always looking for the next opportunity.

Kristina: One word: value. A Millennial likes to contribute value to whatever they are a part of. You show your Millennials you value them, it won't even cross their mind that there is something better out there. If they get to contribute value repeatedly, then they know they aren't wasting their time, or yours. Keep in mind, this is a generation of people that have watched two generations get done over by companies for either staying with a company too long or not staying with one long enough.

Millennials aren't in search of that perfect number of years, they are chasing valuable work. They are leaving when someone else shows them they value them more than you do, so don't let that happen.

Ben: I agree with Kristina's input as far as watching previous generations in the workforce dealing with staffing/layoff issues, but I think there's a more practical answer. The age of Millennials (20-35) puts them in the prime age for entry-level career opportunities. After a short term in many entry-level positions, they are ready to move into a more professional, permanent position to move up the proverbial career ladder. This is also a time when many younger workers can afford to take risks, change jobs, etc., while they do not yet have significant responsibilities tying them to a particular company or position.

That argument is supported on the opposite end of the spectrum as well, since we see that the median tenure for workers over age 65 is approximately 10 years. As workers move toward retirement age, they are less likely to make changes that might affect income, benefits, and other job-related perks. They have more responsibilities tying them to their jobs than do early career employees.

It's About the Individual

With some of these examples, it's easy to see why people get caught up in the generalizations. It's also easy to see that overgeneralizing can be a dangerous thing when it's driving decisions at the organizational and team levels.

Keep in mind that many of these stereotypes mentioned above are not new. They have been repeated with every generation entering the workforce, because many of those characteristics are more applicable to age instead of a generation. Twenty year olds are likely to be overly confident, more technology-savvy, and eager for feedback than are forty or fifty year olds. It's a question of maturity, not generation. And as we have proven above, even those generalizations don't apply to every person in that demographic.

Our hope with this article is that you'll once again realize how important it is to treat each of your people as individuals. In the long run, that's not only what is best for the employee, but also for the organization as a whole.

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Strategies

for Improving Management of Workers' Compensation Claims

When dealing with Worker's Compensation claims, it is important as a Human Resource Professional to encourage and instruct employees to effectively report and review the claim in question.

by William BeBuys

Since this can be one of the more complex issues the HR Manager has to deal with, there are steps that need to be followed. When claims are handled with prompt attention, you can avoid complications as well as provide useful information to protect employees from future injuries or incidents. There are also ways to potentially save the organization expenses related to such claims. Here are some strategies to improve the management of these claims and also ways to potentially detect fraudulent claims.

Immediate Reporting and Investigation; Document, Document, Document!

Immediate reporting and investigation of a claim is critical to the outcome. The earlier a claim is reported, the easier it will be to investigate as memories are fresh and evidence is intact. Reporting a claim does not mean that an employer is accepting liability for an injury. Reporting a claim quickly affords an injured employee with appropriate care, which contributes to a rapid recovery and helps keep costs under control. It

is imperative to keep complete and detailed notes throughout every step of an internal investigation and the life of a claim. Remember, “If it isn’t documented, it didn’t happen.” Obtain statements from the injured employee, the employee’s supervisor(s), and any witnesses as quickly as possible, and mark the statements as “prepared in anticipation of litigation.” Take photos of the scene of the incident, make diagrams, and secure any tangible items. Often, the injured employee’s immediate supervisor can be the best source of information when investigating a claim. The supervisor is normally most knowledgeable about an employee’s job situation and has the closest relationship with the employee, which can be vital in determining the plausibility of the reported injury.

Maintain Communication With an Injured Employee

Employers must ensure that employees understand the basics of workers’ compensation and the claims reporting process. Once a claim has been filed, losing touch with a claimant when they are out of work or not providing enough information at the start of the claim can immediately damage an employer’s credibility. Keeping the claimant informed, including familiarizing him/her with his/her workers’ compensation rights and obligations as well as the employer’s policies regarding modified duty and return-to-work, keeps him/her connected to the workplace and helps him/her recognize the value he/she is receiving from the employer. Injured employees often seek legal counsel when they feel alienated from their employer and are unsure about their rights and the claim process.

Red Flags for False/Fraudulent Claims

Workers’ compensation fraud occurs when a person willfully makes a false statement or conceals information in order to receive workers’ compensation benefits. Workers’

compensation fraud is not only illegal, but it also leads to higher insurance premiums for employers. Be on the lookout for the following red flags:

Timing: Untimely reporting of the injury or suspicious timing of the injury (e.g., right after a vacation or time off) may be evidence of a false or fraudulent claim. Many false claims happen to be submitted on either a Friday or a Monday.

Inconsistent injury: Is the nature and extent of the injury consistent with the alleged accident? Is the nature and extent of the injury consistent with the employee’s job duties or responsibilities? Does the employee claim he/she was injured in an area in which he/she does not normally work or while performing a task he/she would not normally perform?

Inconsistent accounts of the accident: Do the medical reports (containing the witnesses description of the incident given to the medical provider) and witnesses reports contradict the employee’s report of the incident? Did the employee provide a vague description of the incident?

Lack of witnesses: The majority of employees claiming false work-related injuries usually do not have witnesses to support their claim. Does the employee typically work with and around other employees, yet there were no witnesses to the alleged accident? Does the fact that there were no witnesses seem odd based on the location of the alleged accident?

Lack of contact and cooperation: Is it difficult to get in touch with the employee? Does the employee deliberately delay or avoid medical treatment needed to clarify the medical condition of the employee’s alleged injury?

Numerous claims: Does the employee have multiple prior workers’ compensation claims?

Legal representation: Did the employee immediately retain an attorney?

Dissatisfied employee: Was the employee recently disciplined? Did the employee recently have a dispute with management, or undergo a shift or responsibility change? Was

the employee recently demoted or denied a promotion? False claims often occur when layoff is imminent, seasonal work is coming to an end, or a probationary period is ending.

Develop and Maintain Strong Relationships with Your Medical Providers

It is imperative to establish and maintain strong relationships with the medical providers to whom you send injured employees. Select providers based on proximity, specialty/expertise (consider what injuries are common with your employees), and their willingness to promptly communicate with you concerning claims. The providers should understand your business and your return-to-work/modified duty policies. It is important to emphasize your commitment to return injured employees to work. Be sure to provide clear and accurate job descriptions for both full and modified duty jobs that reflect the essential job duties and physical demands of each position. Without detailed job descriptions, treating physicians may be unable to make decisions regarding the causation of injuries, applicable job restrictions, and modified duty opportunities.

Willful Misrepresentation Defense

Employers can defend against workers' compensation claims when an employee has been dishonest regarding a pre-existing physical or mental condition. Specifically, an employee is not entitled to compensation if, at the time of or in the course of entering into employment, the employee knowingly and falsely misrepresents in writing his or her physical or mental condition, and the condition is aggravated or reinjured in

an on-the-job accident. To assert this defense, the employer must provide potential employees with the following magic warning language in bold print: "Misrepresentations as to preexisting physical or mental conditions may void your workers' compensation benefits."

To successfully assert the willful misrepresentation defense, an employer must prove, (1) the employee was provided with the precise statutory warning in bold type, (2) the employee knowingly and falsely misrepresented a physical or mental condition in writing; and (3) the employee's pre-existing condition was aggravated or reinjured in an accident arising out of and in the course of the employment.

Employers should ensure that the magic language is included in their offer-of-employment paperwork. Be sure to include a detailed job description for the position offered, and be sure that the employee understands that, by signing the form, he or she could be precluded from obtaining workers' compensation benefits if misrepresentations have been made concerning pre-existing conditions.

Return to Work Program

An effective Return to Work (RTW) program is one of the best ways to control claim costs. Successful RTW programs can significantly reduce workers' compensation costs by, for example, reducing temporary disability payments, reducing medical costs, discouraging fraudulent claims, and reducing attorney involvement. Additionally, RTW programs increase productivity as work habits and working relationships do not have a chance to deteriorate; promote better employee morale by reducing the negative financial impact on the injured worker;

“ It is imperative to establish and maintain strong relationships with the medical providers to whom you send injured employees. Select providers based on proximity, specialty/expertise, and their willingness to promptly communicate with you concerning claims. ”

and demonstrate the employer's commitment to the well being of its employees. Moreover, some injured employees experience faster recoveries when back at work, and research has shown that the longer an injured worker is off work, the more likely he or she is to become permanently disabled.

An employer should not use modified duty assignments just to reduce their workers' compensation indemnity. Both the employee and the employer should benefit from the transitional work. When designing modified duty assignments, examine what kinds of restrictions are common with your employees, and determine what types of modified duties your company is likely to need.

Use modified duty assignments to encourage a return to full duty. Modified duty assignments do not have to be within the same department an employee normally works. In fact, separating claimants from the coworkers they are normally around can be good. Remember that modified duty should not be so attractive that the employee does not want to return to his or her normal position. Ensure that modified duties cannot be viewed as punitive. Simply make modified duty different enough that a claimant is motivated to return to his or her regular job. For example, outside workers may not care for an office assignment, or physical laborers may not care for doing paperwork.

Conclusion

Dealing with Worker's Compensation Claims do not have to be complex. By following some of the simple strategies addressed here, you will be able to better manage these claims in a prompt manner and help the organization and employee find success during the process and avoid further complications.



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“Lightening” **Your Work Load** By Understanding Light Duty

By Carin Burford

Light duty is often provided by an employer to respond to medical restrictions a worker has while recovering from an injury. Such positions usually involve decreased physical demands and may be limited by the employer for a specific time period, usually until the employee is released to return to work full duty. Light duty work assignments are often utilized to get an employee back to work as soon as the employee is physically capable to performing such work.

An issue that many employers struggle over is whether to provide light duty to an employee who has sustained an injury. When utilized properly, light duty can enable the employee to get back to work more quickly and earn more than the employee would while at home recovering. Light duty also potentially reduces an employer's overall liability, in that, numerous studies have shown that the sooner an employee gets back to work the lower the cost to the employer in litigation down the road. That being said, the provision of light duty potentially invokes reasonable accommodation analysis under the Americans with Disabilities Act ("ADA"), temporary and permanent disability concerns under state workers' compensation laws, and even questions regarding leave and benefits under the Family Medical Leave Act ("FMLA"). Understanding the following guidelines will assist in lightening your load with respect to light duty.

Understand That Obligations Don't End When "Light Duty Is For Comp Only"

Many employers limit light duty to workers' compensation claimants on a temporary basis while these employees are recovering from on-the-job injuries. There is nothing wrong per se with narrowing the scope of light duty in this manner. However, there may be occasions when an employee requests "light duty" as an accommodation for a non-work-related condition. Understand that regardless of whether the

condition is work-related or not, the employer has a duty to conduct an assessment under the ADA as to whether the requested accommodation (be it light duty or not) will allow the employee to perform the essential functions of the job with or without a reasonable accommodation. Resting on the idea that "light duty is for comp" without considering the implications under the ADA, could definitely open your company up to liability down the road.

Understand That "No Light Duty For Anyone" Policies May Be Suspect

Under the FMLA and state workers' compensation laws, there is no obligation to provide light duty. For a time, this led some employers to get rid of light duty altogether. In the case of those injured on-the-job, these companies had their workers' compensation insurance providers automatically pay temporary total disability benefits to the employees rather than the employer providing light duty, regardless of the employees' work restrictions.

The potential problem with a "no light duty for anyone" policy and practice again arises under the ADA. Again, an assessment of the work restriction should be made. If the restriction is marginal to the employee's overall job function and that restriction can be accommodated through some form of light duty, the company should consider providing it. One example of such a situation could involve

“ For a time, this led some employers to get rid of light duty altogether. In the case of those injured on-the-job, these companies had their workers' compensation insurance providers automatically pay temporary total disability benefits to the employees rather than the employer providing light duty, regardless of the employees' work restrictions. ”

where an employee has a lifting restriction of 50 pounds but the employee's job responsibilities rarely involve lifting such weight. A reasonable accommodation could potentially reallocate this task to another co-worker on a temporary basis. The bottom-line is that an employee's restrictions should be examined not only in the context of whether the company would like to have "light duty" or not, but also as to whether the company can reasonably accommodate such restrictions.

Understand That Employers Are Not Required To Create Light Duty Or Make It Permanent

An employer is not required to create a job or light duty assignment for an injured employee. However, the employer should consider a request for light duty by the employee or their treating physician as a possible request of reasonable accommodation under the ADA.

Neither the ADA nor the worker's compensation scheme mandates that an employer must create light duty positions by job restructuring. But, if the employer already has a vacant light duty position for which an injured worker is qualified, the EEOC and the federal courts have taken the position that reassignment of the injured worker to the vacant position constitutes a reasonable accommodation. Note though, if the position was created as a light duty job, reassignment to that position need only be for a temporary period. There also are no requirements that an employer convert a temporary light duty position into a permanent assignment.

When an employer places an injured worker in a light duty position, the claimant is "otherwise qualified" for that position for the term of that

position under the ADA. Thus, a worker's qualifications must be gauged in relation to the position the employee occupies, not in relation to the job the employee held prior to their injury. It may be necessary to provide additional reasonable accommodation to enable an injured worker in a light duty position to perform the essential functions of that position.

To illustrate this latter point, the EEOC's Technical Assistance Manual provides the following example:

Suppose a telephone line repair worker broke both legs and fractured her knee joints in a fall. The treating physician states that the worker will not be able to walk, even with crutches, for at least nine months. She therefore has a "disability" under the ADA. Currently using a wheelchair, and unable to do her previous job, she is placed in a "light duty" position to process paperwork associated with line repairs. However, the office to which she is assigned is not wheelchair accessible. It would be a reasonable accommodation to place the employee in an office that is accessible. Or, the office could be made accessible by widening the office door, if this would not be an undue hardship. The employer also might have to modify the employee's work schedule so that she could attend weekly physical therapy sessions.

Understand The Business Nature Of The Light Duty Position

Light duty assignments often vary. Whatever the assignment, the position should have some job-related necessity and provide a benefit to the

“ Light duty assignments often vary. Whatever the assignment, the position should have some job-related necessity and provide a benefit to the employer. ”

employer. If the employer is having difficulty coming up with light duty work within the employee's restrictions that may provide a benefit to the company, they may ask the employee for suggestions. This does not mean the employer must provide such an assignment. However, the company should conduct an assessment as to whether the request is reasonable and whether it would cause an undue hardship on the company.

Understanding the Doctor's Limitations Assessment Begins With The Doctor Understanding Your Workplace

One way in which many employers fail when it comes to the doctor/workplace relationship, is that they do not adequately educate the treating physicians with respect to their workplace and the jobs therein. Rather, doctors are left to rely on their patients to provide information regarding the physical requirements of the employee's job or light duty assignments. In such cases, the employer may receive job restrictions from the doctor that are vague, unintelligible, and patently lack understanding of the workplace. As a best practice, the employer should follow up with the treating physician and seek clarification regarding the restrictions.

Interacting with the doctor may be as simple as providing the doctor a job description of the light duty assignment which identifies the physical demands and essential functions of that job. Employers may also provide the doctor with the opportunity to view the workplace and job assignment in person or via video. Educating the treating physician with respect to the essential functions of the light duty assignment and having them opine as to whether the employee may or may not safely perform the job with or without a reasonable accommodation will save an employer many headaches down the road.



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Once the doctor truly understands the light duty assignment and has taken the requirements of the same into consideration with respect to the employee's work restrictions, those restrictions should be followed.

Where the employee has his/her own doctor and the employer has concerns about whether that doctor fully comprehends the nature of the light duty assignment or the employee's restrictions, they should not patently disregard the employee's doctor and stop there. Rather, the company should request that the employee be examined by a doctor of the employer's choosing and at the company's expense limited to the employee's "fitness for duty." The upshot is that employers should not attempt to supplant their own judgment over that of the educated medical professional who understands the employee's restrictions and the essential functions of the work assignment.

Understand That The Employee May Reject Light Duty

On occasion, an employee may decide that either they cannot or do not want to perform the light duty work they have been assigned. When this occurs, the employer should examine the situation further. Do the employee's restrictions match up with the light duty assignment? Is follow up needed with the employee's doctor regarding the employee's restrictions or the job assignment? Are there

other job factors that may be affecting whether the employee is willing to perform this task? Would the employee prefer to stay at home and recover under FMLA?

If at the time of release by their health care provider, the employee has a serious health condition and has not used all of their FMLA entitlement, the worker can decline the employer's offer of a light duty job and be placed or continue on FMLA leave until their 12-week entitlement is exhausted. However, if the employee declines light duty (which is within their restrictions), in most instances such action would prevent the employee's claim for workers' compensation temporary total disability benefits during the period of refusal.

Where the employee refuses light duty within their restrictions and does not have FMLA entitlement or has otherwise exhausted all leave, the company may hold that employee accountable for any unexcused absences as they would any other employee who was absent without leave.

Understand That Acceptance Of Light Duty Halts FMLA Leave But Still May Require Assessment Under The ADA

When an employee voluntarily accepts light duty work; such work will not count against an employee's FMLA leave entitlement. Rather, the employee's right to job restoration under the FMLA is held in abeyance during the period of

“ When an employee voluntarily accepts light duty work; such work will not count against an employee's FMLA leave entitlement. Rather, the employee's right to job restoration under the FMLA is held in abeyance during the period of time the employee performs light duty work (or until the end of the applicable 12-month FMLA leave year) ”

time the employee performs light duty work (or until the end of the applicable 12-month FMLA leave year). It goes without saying that when an employee is at work on a light duty assignment, the employee is not on FMLA leave.

Under this same scenario, if at the time the employee is released to light duty, the employee is disabled under the ADA; the employee can decline the light duty position if a reasonable accommodation would permit the employee to return to his regular job.

Understand That Light Duty Assignments Often Involve An Interactive Process

As important as communicating with the treating physician is, so is interacting with the injured employee. The company should be proactive in reviewing the work restrictions with the employee. The review should be ongoing and interactive with the employee to ensure that the light duty assignment is within the employee's current work restrictions. The employee's supervisor should be made aware of the restrictions and ensure that those restrictions are being followed. Some employers have the employee, safety personnel, and supervisor "sign-off" on the employee's work restrictions and light duty assignments. Before engaging in this practice, a best practice would be to consult legal counsel regarding the same.

A better understanding of these principles will help you as the HR Professional in your organization to better utilize the concept of "light duty" assignments and ensure an enabling process of recovery. Overall liability can be reduced, and will ultimately lighten the burden on your organization as the employee returns to the workplace.



Calhoun County Society of Human Resource Management

Calhoun County is nestled in the foothills of the Appalachian Mountains and the shadow of the Talladega National Forest. It's the home to such attractions as The Anniston Museum of Natural History, The Berman Museum, The Historical Victorian Inn (built in the 1800's) and Jacksonville State University Gamecocks to name a few. Calhoun County Society for Human Resource Management consists of local Human Resource Managers / Representatives that meet, network and provides programs of interest to the Human Resource Professional. CCSHRM has 100% National SHRM membership, whereas, all current and incoming members must hold a national SHRM membership. Please visit our website at calhouncounty.shrm.org.

**CCSHRM meets at the Classic on Noble
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upcoming meeting or event!**

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HBQPRORD -

MY
MOTHER,
MY
WORKPLACE;
an HR editorial

About two months ago I joined more than 25% of the working population when I became an elder caregiver. Thinking about the impact of Eldercare demands on the workforce prior to this was foreign to my concept of HR responsibilities. Immediately I became aware of how many co-workers around me were responsible or had been responsible for the care of an adult family member. Other than a high level of tolerance, the workplace for which I am the responsible HR professional had no Eldercare program or resources. So, that was my fault. HR is gradually and not very aggressively addressing this growing need of our employees.

By Paula Watkins

Here are the numbers that create the basis for the issue. MIT AgeLab reports that the worker population over 55 years old is increasing by 4% each year. By 2015 there will be 32 million workers over 55 years old. In 2010 16.1% of the workforce was 65 years or older. Sloan Center figures by 2019, 25% will be over 55 years old.

Eldercare has its own terminology. The “Elderly Support Ratio” according to the U.S. Census is the number of persons working ages 18 to 64 per person aged 65 or older.

There is also an “Elder Dependency Ratio.” This is the ratio of older dependent (people older than 64) to the working-age population which uses 15 – 64 as the age bracket of support. Obviously, as more people remain in the workforce this definition may be revised. But currently it mathematically looks like the figure below:

There is also the “old-old” referring to those over 85 years in age.

The “Sandwich Generation” refers to those individuals who care for young children in addition to their eldercare responsibilities.

UNDERSTANDING THE DYNAMICS OF ELDER CAREGIVERS

Most elder caregivers are female. Nearly 70% of the female boomer generation is working. Eldercare may be provided long distance, right in the same community or within the employee’s home. Each carries its own special stressors. Long distance results in making decisions sight unseen; listening to situations without being able to actually see what is happening with the adult dependent. It is not unusual for families to rely on a single family member as caregiver or for siblings to simply opt out of the care responsibilities all together. Some become financially responsible

for the long term care provision which can become extremely burdensome. The point is that HR really can be central in planning and promoting an Eldercare Program with resources to assist their employees. From my research most of these programs do not seem expensive and some take more time than money.

Currently, Eldercare programs and resources are most common among larger companies, the healthcare industry and higher education. However, there is no reason that these programs should only be offered by these types of sectors of the workplace. As in the case of Caring.com with 35 employees listed below, it takes someone in the organization caring enough or it takes a group of caregivers asking enough, to get an organization to respond. The Best Practices in Workplace Eldercare Study which was conducted by The National Alliance for Caregiving was released in 2012. Hopefully, you can use some of the sample ideas presented.

Kimberly-Clark (57,000 employees) has a Family Caregiver Network (FCN). They have volunteers who lead quarterly events such as forums or workshops covering topics such as self-care, elder law, scams against the elderly and “Share the Care” training. These are videotaped and placed in a library on their web site. They support their volunteers traveling to conferences about aging and they have developed a Caregiver Starter Kit which includes a document organizer and resource and referral information.

MeadWestvaco (10,000 employees) offers onsite education workshops and a support network for caregivers.

Suncoast Hospice (800-1,000 employees) includes aromatherapies and massages in their Eldercare support.

$$\text{Aged dependency ratio} = \frac{\text{number of people aged 65 and over}}{\text{number of people aged 15-64}} \times 100$$

The U.S. Chamber of Commerce (500 employees) uses their childcare vendor, Bright Horizons, for “back-up care” which consists of subsidized in-home care for older adults. Each employee is eligible for up to 20 days of subsidized care.

Johnson & Johnson (118,000 employees) assists the family with placement decisions, family issues, paperwork and planning. The company assists conducting employee needs assessments.

Aetna (35,000 employees) provides services through their EAP and website both of which are 24/7. Information is provided through assessments, podcasts, webinars, educational guides and seminars.

American Psychological Association (600 employees) uses their program as a recruiting tool. They offer Bright Horizons Adult Back-up Care as an option.

Caring.com (35 employees) provides up to five days off for eldercare emergencies related to parents, in-laws or grandparents. They also allow up to 90 days of unpaid leave to manage caregiving.

CBS (not available) also uses Bright Horizons for in-home emergency care to the employee’s elder family members. Employees can use as many as 14 days for only \$4 an hour. Employees are also supported by Health Advocate, a vendor that provides information about Medicare, benefits and insurance needs.

Duke University (32,000 employees) offers free, confidential eldercare consultations face-to-face or by phone.

Emblem Health (5,000 employees) is pilot testing “Share the Care” groups which are managed by a social worker and includes a series of sessions that last 10 weeks to assist employees to support each other in their caregiving efforts and help one another

develop solutions to problems that arise. So far the evidence-based program has been shown to delay nursing home placement by up to 18 months by helping caregivers better manage their caregiving.

Fannie Mae (6,000 employees) developed an Elderkit for their website and also supply a copy on CD.

Intel (54,000 employees) has a Dependent Care Assistance Program which has evolved into an intranet site devoted to eldercare issues.

Overall, companies with Eldercare programs and resources report reduced absenteeism, improved mental health and productivity of caregiving employees. We all know that our workforce population is gaining more senior aged employees

and that means more employees will join the Eldercare ranks. Recent surveys of the American workforce suggest that a large portion (60% to 70%) of the workforce plans to continue working after the standard age of retirement. At the same time life expectancy is increasing and the number of old-old elders who need some ongoing assistance with their activities of daily living will increasingly place demands on people in the workplace.

Without Eldercare programs employees may be forced to leave the workforce to cope with the challenges. Providing

eldercare can be unpredictable, emotionally taxing and often at odds with work schedules and responsibilities. Some of the tough conversations we have to have cause dissension between the loved one and the caregiver, or between family members. The first tough conversation I had with my mom was when it became clear that she was beginning to have memory problems. I suggested that she visit a physician to discuss whether one of the new medications on the market could help her. WHOA! It took nearly two more years for her to admit that

Eldercare is a significant challenge to a significant and growing portion of our employee populations. Across the board, wherever there are Eldercare programs in place, the employees reported having a sense of “validation” of their situation and it made them feel as if they were not alone in their caregiving problems.

her memory was failing. What those initial talks resulted in was tension between us, where no tension had ever existed.

The normal experience with childcare is that children learn to tie their shoes, take care of themselves and become independent. At some point you can hope for financially independent adults. Eldercare is on the opposite end of the spectrum. Adults become dependent, may revert to becoming physically unable to take care of themselves or to tie their own shoes. They may become financially dependent aside from Medicare or Social Security. And, along the way the caregiver may need to broach taking over paying bills, managing their money and (the biggie) relinquishing the car keys.

The National Alliance for Caregiving and Center for Productive Aging at Towson University issued their study findings in "Corporate Eldercare Programs: Their Impact, Effectiveness and the Implications for Employers" in 2008. For over

50%, the health of caregivers worsened within six months of assuming that role. Participants in this survey reported giving 13.5 hours a week tending to caregiving tasks but another survey reported an average of 21 hours. 70% reported that caregiving responsibilities required them to take time off from work.

HR needs to be proactive and can "dip their toe" in this arena by trying such policy changes as allowing employees to use their sick days for caregiving purposes or permitting laying away sick days or vacation days for caregiving use. Both are family-friendly changes that employees should respond to positively. Even fostering a group of caregivers for sharing ideas, resources and experiences can be the beginning of an effective, low-cost program.

It really is an HR initiative.

P.S. I got the keys this weekend. My mom decided she wanted to sell her car.

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Health and Wellness in Alabama

By Elisabeth A. Doehring

“ If we accept the hypothesis that employee debt is the employers’ debt, (i.e. is an enemy of the employers’ profits), then the advice would be for the employers to seek out ways to help employees deal with their debt. ”

-Dr. E. Thomas Garman, Founder of PFEEF

“Sweet Home Alabama” resonates a fall rite of passage for Crimson loyalists at Bryant-Denny. These same lyrics fill car stereos along the interstates and byways for native Alabamians, Crimson Tide or War Eagle, heading home for the holidays to Dothan, Demopolis, or Decatur. However, some Alabama workers still struggle to maintain enough cash for the simple weekly commute or to pay for public transportation to and from work, much less maintain a roof over their heads. Many Alabama workers across every demographic maintain their jobs and suffer in silence. Seemingly dedicated employees have an additional weight bearing down on their Monday through Friday workweek. Alabamians are worried about paying bills and making rent or that next mortgage.

A newly released report from the National Consumer Law Center (NCLC) <http://www.nclc.org> entitled “No Fresh Start: How States Let Debt Collectors Push Families Into Poverty” shows that four states got poor marks. Residents of Alabama, Delaware, Kentucky, and Michigan scored an ‘F’ grade in an across-the-board

consumer protection report. According to NCLC attorney Caroline Carter,

“Employers in Alabama beware! You might have a good employee who is producing and contributing to your company’s profitability. Yet this employee is susceptible to having a debt collector go straight into their individual bank account and confiscate funds. This is money that an employee might truly need to pay for that week’s full tank of gas or use as bus fare to work.”

According to Stephen Stetson, policy analyst and attorney for Alabama Arise, a nonpartisan public policy organization,

“As a native Alabamian, I was stunned and dismayed to see that instead of Alabama moving forward that the results from the NCLC study showed that we are actually falling behind in time.”

Payday lenders are setting up shop in Alabama. “Even if the average Alabama worker or company owner does not walk through the doors of these private high cost payday lender storefronts, the problem still affects everyone. It decreases overall consumer spending in our state,” says Stetson.

According to The Net Economic Impact of Payday Lending in the U.S. - InsightCenter for Economic Development - March 2013 Study, “Every dollar spent paying back a high-cost lender takes \$1.94 out of the local economy.”

Sylacauga quarries are famed for their white marble. “In fact we have the purest white in the world,” according to Carol Emlich-Bates, Executive Director of the Sylacauga Chamber of Commerce. Sylacauga marble is used throughout the National Mall area of our nation’s capital.

In fact, the Washington Monument was built with Alabama’s premiere white rock. “We have veins rich enough for the next 200-300 years,” says Emlich-Bates. “What we don’t have today is a community for our company employees to work in peace without being financially bombarded by payday lenders.”

Over the last decade four key industries have setup operations in conjunction with Sylacauga’s massive quarry operations. Even more are scheduled to

Many Alabama workers across every demographic maintain their jobs and suffer in silence. Seemingly dedicated employees have an additional weight bearing down on their Monday through Friday workweek. Alabamians are worried about paying bills and making rent or that next mortgage.

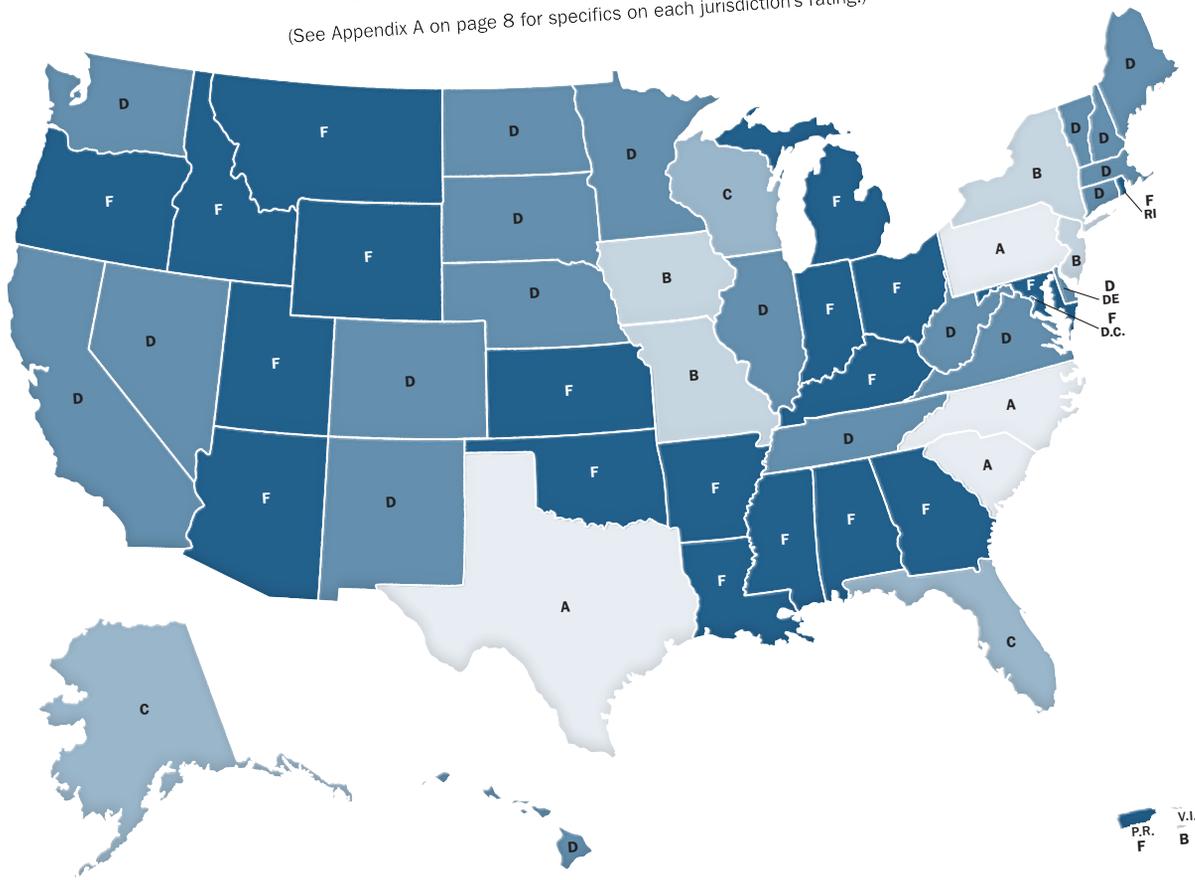
NO FRESH START

HOW STATES LET DEBT COLLECTORS PUSH FAMILIES INTO POVERTY

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STATE PROTECTION OF WAGES

(See Appendix A on page 8 for specifics on each jurisdiction's rating.)



- A** States that ban wage garnishment for most debts
- B** States that preserve 90% of the debtor's wages
- C** States that protect enough wages so that paycheck does not drop below the poverty level (\$452.88 per week for family of four)
- D** States that otherwise preserve more of a worker's wages than the minimum required by federal law
- F** States that protect only the federal minimum

No Fresh Start ■ 1

expand operations into the area. Explains Emlich-Bates, "However within the last month industry leaders Imery's, Omya, Heritage Plastics, and IKO have expressed concern that the presence of these payday lenders might have a direct negative impact on their employees' financial wellbeing and stability as well as overall company productivity."

Doug Hurst serves as Program Director of Gateway Financial Freedom in Birmingham. A nonprofit United Way Agency that covers Blount, Jefferson, Shelby, St Clair Counties, and Walker, the organization sees a wide demographic of clients. Half of Hurst's clients have college degrees. Gateway counsels the workforce of most major companies in North Alabama. "We are seeing dramatic increases in payday and title loans overextensions within the last 2-3 years," notes Hurst. This is creating distractions at work, and calls from creditors.

What Hurst is seeing is that "Instead of teaching their children how to balance a checkbook, parents in Alabama are focused on giving their children all the best things in life. We also hear from many clients who have applied for general financial jobs such as cashiers that have been refused employment due to poor credit scores. This just perpetuates the cycle of debt."

Like Hurst Willie Simpson runs a financial counseling organization. Simpson is CEO/President of Shoal's Debt Management, Inc. With two decades in the debt education consulting business, Simpson sees an average of 10 clients daily. Simpson and his financial counseling staff sit down and go over credit reports, bills, and credit cards to help clients set up budgets. "People are so stressed out today from these payday and title loan companies here in North Alabama. Workers at major employers are being called on their work lines and cell phones during actual work hours. They are being bombarded! I advise my clients to 'tell the creditor that if you continue to call me at my job you might make cause me to lose my job. Please don't call me at work anymore!'"

Historically, in 2008 employee financial security in Alabama crashed along with the world Economy. Since that time employers have been striving for ways to improve individual employee financial wellbeing. Different options and programs have been designed by human resources and benefits professionals that



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serve as a direct catalyst for increasing retention, lowering attrition, and most importantly improving overall company productivity.

Human resources and benefits departments have watched employees struggle. These same professionals are now focused on getting their financially worrisome employees back on track. Financial wellbeing programs dot the world and now extend into the Alabama landscape. Company leaders are taking notice. Financial wellbeing programs are now part of a company's overall employee wellness program.

Nearly five years after reeling from the Recession, distressed employees are kicking off the dust and getting back to basic math. Companies keen on retaining solid talent and increasing productivity are now outspoken proponents of financial-based programs. The surge in popularity and unique ways of delivering such strategies have human resources and benefits professionals scurrying to the drawing board to design new ways to court and retain employees, cut healthcare costs, and drive productivity numbers.

Defined-benefit pensions took a significant nosedive in the 1990's. Employers saw the financial burden of carrying these plans. A quick shift happened when employers moved from taking the risk for bearing and guaranteeing employee pension funds to the new norm of defined-contribution plans.

According to the Urban Institute, within the United States defined-contribution and defined-benefit plans combined hit a record high of \$12.5 trillion in the first three months of 2013. Stock prices have soared.

Employees are living longer. After age 65 life expectancy reaches well into the 80's for people living in any of the 34 countries making up the OECD (Organization for Economic Co-operation and Development). Furthermore people are putting off retirement. In Alabama alone, the average life expectancy is 75 years of age. When we do the math, this makes up a significant portion of the Alabama workforce over 55 staring at retirement--with little savings or parachute.

Direct correlations between stress and its affect on the human body are well established. Stress from financial issues claims the top spot on Research Works: Partnership for Workplace Mental Health Report, February 2009. According to the study, money is a significant source of stress for 81% of people, the economy was second at 80%, work was third at 67%, family health problems made up 67%, and housing costs were at 62%.

People with financial stress have more health issues. For people living with high levels of financial burdens, stress manifests itself in various physiological conditions. A poll from AP-AOL Health Poll: Debt Stress: The Toll Money Takes on the Body, demonstrates that people with high levels of financial stress experienced 39% insomnia/sleep issues. High blood pressure prevailed among 33% of respondents. Over one-fourth reported stomach ulcers. More than half encountered muscle tension/back pain while 29% had severe anxiety and another 23% noted severe depression. Migraines and headaches were noted by 44% of respondents.

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A 2012 PwC Employee Financial Wellness Survey interviewed employees on the state of their individual financial wellbeing. The results were eye opening. One figure showed that 54% of employees were concerned that they did not have sufficient emergency savings for unexpected expenses. Personal financial issues were also impacting employee productivity as evidenced by the fact that 61% of employees responding to the PwC survey admitted that they found dealing with their financial situation stressful. In addition, one-third of respondents admitted that personal financial issues have been a distraction at work, and of these respondents, 97% of them spend time at work either thinking about or dealing with issues related to their personal finances.

Education incentives and programs that focus on financial wellness are now wide-reaching in today's competitive workplace culture. Financial wellbeing programs serve as both drivers and enhancers of employee engagement. Stronger profits and a competitive edge are the current trend and the

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wave of the future globally. Companies and organizations in Alabama are leading the way with employee financial wellbeing programs.

Leadership is the key driver for employee financial wellness at Children's of Alabama. The hospital system provides specialized medical care for ill and injured children across the state and throughout the Southeastern United States. For the past four years, US News & World Report has ranked Children's of Alabama among the best children's hospital programs in the nation. In 2013 Children's recorded 670,000 outpatient visits and nearly 14,000 inpatient visits from every county in Alabama and from 41 other states and four foreign countries. Additionally, Children's is the third largest pediatric medical facility in the United States.

Douglas B. Dean, CCP, SPHR, Chief Human Resource Officer for Children's of Alabama is a strong proponent of employee financial wellbeing. "For minimal benefits cost we have access to and deliver a wide range of extensive financial wellness services for our employees. This is helpful as most

of our employees live financially month to month," says Dean. Children's of Alabama launched their financial wellness program with Financial Finesse six years ago. Financial Finesse is a leading provider of unbiased financial wellness programs to corporations, credit unions and municipalities with over 600 clients across the United States.

Dean guides the human resources of this 4,500-member direct caregiver workforce. The team includes physicians, nurses, pharmacists, environmental/food services, and administrative teams. As part of Children's financial wellness program, employees have free access to onsite financial training sessions. Certified financial planners conduct lunch and learns on topics such as debt management, retirement investment fund basics, savings strategies, tax planning, and mortgage classes. Reminders are sent via intranet and through postcards mailed to employee homes.

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feel strapped with debt or have financial questions are free to call the designated 1-800 number from work or home. All calls are confidential. Children's does not have access to either individual employee information or specific inquiries.

Confidentiality and privacy remain paramount with Children's financial wellness program. "We don't want to intrude in our employees' personal lives. We want to make it easy for our people," says Dean. Children's program is customized and personalized for each employee.

"When you're in healthcare, the most important customer is your employee. That might surprise some people. However to deliver high quality world-class healthcare, we do not want any one of our employees distracted. At Children's we offer financial wellness benefits to ensure that our employees are not focused on or worried about personal financial matters. This allows them to devote more time and focus to our individual patients. Financial wellbeing is good for our employees. And it's good for another customer--

the patient."

Like other companies who adopt financial wellness programs, Children's is focused on healthy, content and happy employees. Organizations are finding that financial wellbeing strategies deliver more employee engagement, higher customer care, and increased revenue.

According to Liz Davidson, Founder and CEO of Financial Finesse, "Doug has always been a thought-leader in financial wellness. His program has been very successful and I believe that it's largely because Doug really understands that helping employees improve their financial wellness is a process that he recognized early on and that no one can change their behaviors overnight."

"When we partnered with Children's of Alabama to deliver their financial wellness program, we recognized that hospital employees often work around the clock so coming to them with the education, rather than expecting them to come to it, was critical. We developed a program with Doug that provided employees with multiple



ways to access the education through a financial helpline they could call anytime, from anywhere to discuss any issue or question. Workshops were held at the hospital that focused on issues that we specifically learned were most pressing to the employees. We held one-on-one financial planning sessions with one of our certified financial planner professionals. This allows us to personalize information for the employees so that they are better able to make the changes to improve their finances that are not only manageable with their busy schedules, but also the ones that they really see as important to their lives.”

Financial wellness programs are now in demand. Money can be a big scary topic for adults. “Financial stress is a feeder for everything,” explains Davidson.

At University of Alabama-Birmingham financial wellness is a key employee offering. Kris K. Findlay serves as Financial Counseling Consultant. UAB’s human resources’ department called Kris back from retirement to coach their program. “This is a free employee-provided service. It runs the gamut. We see a lot of payday loan anxiety. Employees are caught up in the tangle. I see all ages and it crosses the board here,” says Findlay.

While some employees are initially apprehensive, that quickly shifts once they

begin working through excel budget sheets. “They’re afraid they will be judged,” notes Findlay, “so I make them as comfortable as possible.”

UAB Director of Employee Assistance and Counseling Center, Anne Hilbers, uses two key drivers for bringing home the message of financial wellbeing. The 23,000 employees of the UAB family system receive emails as well as read articles and notices from various employee publications. “People continue to come to us for these financial programs. Proof of the success is that we get huge

turnouts for our monthly employee financial seminars like identity theft and retirement planning,” says Hilbers.

Judith Cohart runs the Personal Finance Employee Education Foundation (PFEEF) out of Washington, DC (<http://pfeef.org>). PFEEF is a non-profit organization that promotes and facilitates financial education in the workplace. “With our country’s current financial crisis, more and more people are becoming financially distressed. Those Americans who are able to handle finances well, has significantly dropped from 42% down to 24% between 2006-2012,” says Cohart.

As more and more employers shift away from pension plans to 401K’s, improving financial wellness is becoming a key focus and gaining momentum in Alabama and the rest of the world. “We are finding that employees are not saving enough. Without a pension and with likely future changes to Social Security, employees are finding themselves navigating the retirement high wire without a safety net,” says Kent Allison, Partner and National Leader of Financial Education Practice for PwC (PricewaterhouseCoopers LLP).

“Companies in Alabama as well as the rest of the nation want their employees to be more self-sufficient and to make wise financial decisions. Employees focus on the here and now--such as their children’s education--is wrong. They must instead focus on their own future like retirement,” says Allison.

Although a relatively new offering, many financial wellness programs are seeing participation between 40 and 50% of the population without incentives. “We’ve seen it as high as 80 to 85% in a well-supported and well-communicated financial wellness program,” explains Allison.

For younger millennium employees, Allison

“ With our country’s current financial crisis, more and more people are becoming financially distressed. Those Americans who are able to handle finances well, has significantly dropped from 42% down to 24% between 2006-2012... ”

uses experiential learning techniques, among other methods, that put workers through assimilated life choices. This allows younger employees to understand the impact of their choices prior to making the next financial decision.

PwC's 2013 Employee Financial Wellness Survey tracked the financial and retirement wellbeing of 1,600 working American adults. The third party vetted report showed that over a third (38%) of respondents find it difficult to meet household expenses on time and that one-fourth of respondents admitted that personal financial issues have been a distraction at work.

"Employers recognize their employees are not saving enough for retirement and that many are even raiding their 401k plans for near-term expenses. While our study figures are at 26%, I have already seen some of my clients' loans and withdrawal rates as high as 30 and 40%. People are straddled with debt and are living paycheck to paycheck. As a result, financial wellness programs

are becoming more and more embraced and engrained within a company's overall wellness package offering because they focus on promoting good overall financial behaviors," says Allison.

"Right now we have 'the perfect storm,'" explains Allison. "People are living longer. Healthcare costs are rising. Defined benefit plans are vanishing. To top it off government retirement plans around the world are stressed."

With more and more companies looking to increase employee engagement and profitability the outlook for financial wellbeing programs is a new trend for human resource and benefits departments and forward-thinking companies. Financial wellness is paying dividends for employee loyalty. As more companies look for that competitive edge financial wellbeing will become a key ingredient in employer benefit offerings. The trend is clear. World and company leaders here in Alabama are moving closer and closer to promoting individual and employee financial self-sufficiency.

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