

**Hamilton College Strategic Planning Subcommittee Report, Summer 2008**  
*Faculty and Staff Recruitment and Retention*

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Hamilton College's most important resource is the people who are committed to its well-being and future, and foremost among those people are the employees of the College. Without the support and efforts of the individuals who work at Hamilton, the goals of the College would be impossible to attain. These are the individuals who on a daily basis educate and provide for the well-being of the students, maintain the physical campus, facilitate interactions between the College and external communities, and guide and plan for the future of the College. Therefore, it is critical that the College continue to recruit outstanding employees, work to sustain and develop the potential of its current employees, treat its employees in a fair and equitable manner, and acknowledge and reward the contributions of the employees to a community focused on the education of students. If the College continues to work toward the creation of such a workplace, it should be in a strong position to recruit, develop, and retain an exceptional workforce in spite of the challenges that may be posed by future job markets.

Our subcommittee has worked over the past months to gather background information on employee recruitment and development. We have met with Vice President of Administration and Finance Karen Leach, Director of Human Resources Stephen Stemkoski, Associate Director of Human Resources Carol Bennett, Associate Dean of Faculty Patrick Reynolds, and Assistant Dean of Faculty for Diversity Initiatives Steven Yao. In addition to reviewing data on a variety of topics, we have surveyed employee groups, and we have held or attended open meetings with Staff, M&O, Administrators, Faculty, and the entire Hamilton. We appreciate the time and energy that the members of the community have invested in helping us examine issues of recruitment and development of all employees of Hamilton College in order to identify and prioritize issues to be addressed over the next five years. We believe as we move forward that we have a solid foundation on which to build and commit to the institutional success of Hamilton.

**Strengthening the Employee Community**

*Create a workplace that bridges unnecessary divisions among employees by offering more opportunities for groups to interact professionally and by highlighting the importance of all employees in achieving our common goals.*

Despite being engaged in the common goal of creating the strongest possible environment for the education of students, Hamilton's employees differ in the jobs they do, the skills they bring to these jobs, and their backgrounds. As we collected comments and feedback in the course of our work it became clear that these differences, although necessary, can contribute to a sense of Hamilton as a divided, exclusionary, and hierarchical community. Reducing the negative impact of these divisions needs to be a priority in both the short term and the long term.

Our Committee studied issues of employee recruitment and development in this report based on the current four employee groups: Administrators, Faculty, Maintenance and Operations (M&O), and Staff. While these groupings capture some important similarities about the nature of the jobs in the group, they also homogenize and erase important individual differences within each group making it easy to assume that all members of the group are the same. Such groupings

also emphasize distinctions between categories, making it easy to focus on the differences between the groups while ignoring the overlap between groups in regard to common concerns and goals. We saw little support on campus for changing these designations, and we will use these groupings as we discuss the issues around recruitment and development despite these shortcomings in their use.

Discussions with various groups of employees on campus identified undercurrents of separation between and within employee groups that at times hinder effective and cordial working relations and contribute to perceptions of competition, exclusion, low morale, and division rather than cooperation and interdependence. We recommend that steps be taken to strengthen the connections between employees both within and between employee groups. Some of these steps might include the following: expanding the elected membership of key committees to include a broader employee representation, promoting campus-wide recognition of all employee groups perhaps with a less academically focused internal webpage or revival of "Around the Hill," creating a higher external profile for a wider range of employees, offering opportunities for all employees to get to know one another within and between divisions, creating opportunities to understand other employees' jobs in order to facilitate professional interaction, supporting the development of managerial and supervisory skills, identifying opportunities for all campus meetings at times that allow all employee groups to attend, and funding a student selected award for a non-faculty employee annually. It is important that actions successful in overcoming unnecessary separation between employees be institutionalized. The goodwill and sense of shared community of such actions will far outweigh any cost; the overall effect will support the message that the purpose of the College is education and all employees have a part in this process.

#### Adjusting to an Aging Workforce

*Begin assessing the impact of the retirement of significant numbers of employees across the College, planning for the replacement of a highly experienced workforce, and providing more support for employees as they transition to retirement.*

Two factors that cut across different employee groups at Hamilton are the aging of the College workforce and the longevity of its employees at their jobs. Together, these factors will pose serious challenges for the College in the near future as large numbers of experienced employees reach retirement age.

Like the population of the United States, the employees of Hamilton are aging. Currently 21 % of the tenured/tenure-track faculty members are 55 or older, as are 24% of administrators, 27% of the staff employees, and 30% of M&O employees; even larger groups of employees are currently in the 45-55 age range. Around 2013 Hamilton will begin to see a sharp rise in retirements in all groups of employees that will continue over the following 15 years. Competition in recruitment is likely to intensify as other colleges will also face the retirements of their baby boom employees at the same time as the pool of replacement employees shrinks. The rise in numbers of individuals planning to retire will also influence the campus workplace in a variety of areas including the impact on the workplace of issues of health and disability, the need for increased emphasis on retirement planning for employees, and decisions about flexible work options such as reduced hours.

In addition to an aging workforce, employees of the College frequently work at Hamilton for long careers, with numerous employees working 35 years or more at their jobs. The retirements of long-term employees mean the loss of experience, knowledge, and skills posing a number of challenges for which the College needs to prepare. The need for succession planning between retiring and newly hired employees will be vital to ensure the transitions necessary for the College to function smoothly.

At the same time, the retirement of large numbers of employees offers opportunities to recreate the workplace and to rethink broader aspects of the College in the future. For example,

we could consider issues of the College's mission, shift emphasis in the curriculum, adjust the size of the workforce, hire an increasingly diverse workforce, and rethink governance and management culture. It is critical that the College begin to act proactively to identify the challenges and opportunities posed by upcoming retirements and to start developing plans for meeting these challenges and opportunities.

#### Recruiting Employees

*Examine the diversity of all Hamilton employees more systematically and set benchmarks where appropriate, act affirmatively to hire a diverse workforce, and provide the support necessary to retain a diverse workforce.*

*Workloads for employees should enhance Hamilton's competitiveness as an employer and be equitable within job categories.*

*Develop a policy around spousal/partner hiring.*

The retirements of substantial numbers of employees across the campus means that the College must be competitively positioned to hire new employees. We see three areas that Hamilton should examine to increase our competitiveness in hiring: employee diversity, workload issues, and spousal/partner hiring policies.

Recruiting replacements for retiring workers increases the opportunities to create a community that reflects the diversity of the world in which we live, and the College should make plans to improve the diversity of our work force. There are a number of groupings that could be examined in regard to adding diversity to the workforce including, but not limited to, the following: age, race, ethnicity, gender, sexual orientation, class, religion, nationality, and disability. As part of a campus-wide discussion on diversity, the College should identify those categories that it believes are important to examine in regard to its employees, set benchmarks to track progress in those areas, report to the community regularly on the status of employee diversity, and continue to work toward creating a campus climate that welcomes a diversity of employees.

There is a range of educational, occupational, and economic diversity among the College employees. These differences are in part a function of the variety of jobs needed to run a college, the skills needed to fill the jobs, and the market forces behind employment. In regard to diversity issues, the College has historically focused on areas where there has been less diversity, primarily tracking the gender and racial diversity of the faculty and focusing less systematically on other forms of diversity or on other groups of employees. We know, for example, that 60% of the tenured/tenure track faculty members are male. In comparison to our NESCAC peers, Hamilton ranks at the average for percentage of female Full Professors (29.1% female), significantly below average for Associate Professors (37% female) and significantly above average for Assistant Professors (62.9% female). Clearly in recent years the College has been successful at recruiting female faculty members; examination of the current status of tenure-track hires from 2001 to 2005 suggests that equal numbers of male and female faculty members (4 of each) in that cohort have left the college, leaving the College with a retention rate of 70% for recent tenure track hires. There has been steady improvement in numbers of faculty of color at Hamilton over the past few years. Currently 17.5% of faculty members are faculty of color, putting Hamilton's percentage behind only Amherst in the NESCAC schools (excluding Tufts). The College must continue to increase the racial and gender diversity of its faculty as it also turns its attention to the other employees on campus in this regard.

Staff and M&O reflect a highly gendered job distribution with staff being 77% female and M&O being 82% male; administrators are more evenly distributed in regard to gender with 53% being female and 47% being male. In regard to race, 5% of M&O, 3% of administrators,

and 1% of staff are employees of color. The 2006 Census information on the population of Oneida County reports 10.3% of the population is non-white, which might provide a benchmark for local hiring in regard to race. Jobs that recruit nationally could draw from a more diverse pool of applicants, and efforts should be made to act affirmatively in all hires. As the diversity of the College employees increases, we need to develop a culture that values diversity and to support the individuals who bring diversity to the community. We urge that committees set up to work on diversity issues include a focus on employee diversity.

Workload is a critical element in hiring and retaining new employees. In order to remain competitive in recruiting strong faculty members, the workload of the faculty in terms of teaching needs to be in line with the colleges with which we compete for new hires. Currently, Hamilton has a five course teaching load for most faculty members, although there are 13 departments and programs in which faculty offer their senior programs as overloads, pushing some faculty above a five course load. The teaching load at five NESCAC schools (Amherst, Bowdoin, Tufts, Wesleyan, and Williams) is already four courses or fewer, while the remaining five colleges (Bates, Colby, Connecticut College, Hamilton, Middlebury, and Trinity) are at a five-course load. The College needs to begin to consider ways to shift to a four-course load in the future in order to maintain its competitiveness in faculty hiring.

In addition to concerns about workload at the initial hire, unevenness of workload in terms of teaching, advising, and committee work both across and within the academic departments and programs was a concern especially for untenured faculty. Issues of inequitable workload were reported by other employee groups on campus as a source of frustration along with concerns about working for multiple supervisors with inconsistent priorities, having to do other employees' jobs, and working under outdated job descriptions. A major goal for many staff members is to have a job description that matches the job they do. Jobs change for individual staff members over time, but job categories and descriptions are focused on initial hiring criteria and tend not to be modified as the job changes. Employees believe that taking on more responsibility or adding more tasks to a job but not receiving recognition for that work in their job description undercuts workplace morale. We recommend that the College examine workload issues within job categories and explore the advantages and disadvantages of restructuring job categories to better reflect the work being done.

When hiring in national searches, concerns frequently arise around employment for spouses or partners; indeed, comments by both senior and junior faculty members suggest that spousal/partner job opportunities are one of the most important aspects in hiring faculty. Although Hamilton does point newly hired employees toward some information in regard to spousal/partner employment, the College has no systematic policy in place about spousal/partner hires. We recommend that Hamilton examine the policies that other colleges and universities have developed for spousal/partner hiring with an eye toward creating a more comprehensive approach to this problem at Hamilton. There are a range of possibilities that include the creation of a number of continuing visiting positions to be used only for spousal/partner hires, setting aside funds to be used only for the hiring of spouse/partners across the College, or joint or shared positions. We believe in light of the growing importance of this concern that the College should develop a systematic policy that can be applied equitably rather than deal with this issue on a case-by-case basis.

#### Compensating Employees

*Continue to control health insurance costs, investigate the costs and benefits of increasing subsidies of health insurance for retiring employees, and support the provision of long-term disability insurance to all employees.*

*Set highly competitive starting salaries, compensate for wage compression, and develop clear and consistent policies for evaluations and raises for all employees.*

It is imperative that the College continues its efforts to offer competitive salaries and benefit packages in order to recruit and retain employees. Appendix 1 contains a list of actions that the College has taken in recent years to address issues of employee benefits and salary, and it suggests that Hamilton starts from a solid foundation in this regard.

The College believes that it offers a very attractive benefit package that is an important tool in recruiting new employees, and most employees agreed with this assessment in our discussions with them. The College has avoided increasing the cost to employees of health insurance premiums over the last two years despite national increases in employer health insurance premiums of 7% in 2006 and 6.1% in 2007. Although the number of employers nationally who have discontinued or reduced contributions to employee pension or retirement funds has been increasing, the College has continued its commitment to contribute 10% of a half-time or more employee's regular salary to a 403(b) account after one year of service. Employees who use the tuition benefits are deeply appreciative of the College's commitment to help make education for its employees and their families more affordable. Many employees, however, are not aware of the costs to the College of such benefits, and we think that it would help employees better understand their total compensation package if the College were to provide more specific figures on its contributions to the benefit packages of its employees on a regular basis.

We believe that managing health insurance costs will continue to be a major challenge over the next few years in regard to benefits. The National Coalition on Health Care estimates that since 2000 the costs of employment based insurance premiums have increased 100 % nationally, outpacing inflation and wage growth, with little sign that increases will slow significantly in the next few years. We recommend that the College continue to negotiate aggressively to secure affordable health insurance for all its employees. At the same time, we think that the College should explore the possibility of contributing more toward the health insurance premiums of its retired/retiring employees. In our discussions with every group of employees, individuals mentioned that it is often the costs of health care that prevent them from retiring when they wish; given the larger numbers of individuals approaching retirement, we anticipate that employees' considerations of health care will play an even more pressing role in decisions around retirement. By increasing its health insurance subsidy to employees during retirement and/or by bridging the gap for employees who wish to retire before they are eligible for Medicare, the College might save on salaries and pension contributions as higher paid employees retire, enable individuals in poor health or with disabilities to retire early, provide more options regarding retirement for all employees, and show its appreciation for its employees, many of whom have devoted numerous years of their lives to Hamilton College.

In addition to health insurance benefits, we suggest that the College examine its provision of long-term disability insurance to its employees. Currently, salaried workers (Faculty and Administrators) have access to long-term disability insurance, and hourly workers (Staff and M&O) do not. M&O employees frequently brought up their lack of long-term disability insurance as an issue important to them. We recognize that salaried and hourly workers work under different circumstances with differing access to additional avenues to cover disabilities (e.g., sick days, emergency leave banks, personal days); nevertheless, we urge the College to re-examine its policies around long-term disability insurance.

An attractive benefit package alone is not sufficient to recruit and retain a strong workforce; it is important that employee salaries are competitive and reward the accomplishments of the employees. We see three major issues related to salaries that the College needs to consider: keeping starting salaries competitive to help recruitment, adjusting current employee wages for wage compression, and ensuring that all employees are evaluated for raises using clear processes for performance evaluation and compensation allocation. These concerns cut across all job categories at the College; however, employee recruitment, salaries, and evaluation processes vary with the nature of the jobs involved and the markets from which employees are hired.

There are relatively transparent and consistent processes in place for salary and raise considerations for M&O and Faculty. Salaries and raises for most M&O employees are negotiated between the College and the Service Employees International Union, Local 200 United, every three years. The agreement spells out starting wages and wage progression, and this information is available to all covered employees. Information about aggregate faculty salaries and raises by rank is provided to faculty annually and compared to a national benchmark of AAUP \*1 standard for each rank; decisions about raises are reached using by a standard evaluation process for all faculty members. The College has not consistently been able to achieve the AAUP \*1 benchmark, especially for Assistant and Associate Professors, although recent increases in starting salaries may move us in that direction. We recommend that the College continue its commitment to achieving AAUP\*1 status for all ranks of faculty in order to maintain its competitiveness in faculty recruitment.

There is significantly less clarity about the adequacy of salaries and the decision making process regarding raises for Staff and Administrators, and this lack of transparency was a key source of concern to these constituencies in our conversations with them. The College goal for Staff is to offer salaries that are at least at the regional average and to offer a better than average benefit package. To ensure that these goals are met, regional surveys are to be done every two to three years, although the perception is that the surveys are not consistently done or shared widely. Administrators' salaries are to be nationally or regionally competitive depending upon the position, and ad hoc evaluations for competitiveness are done as requested. We recommend that all employee groups have annual access to some form of aggregate information about salaries for an appropriate internal comparison group and access to an appropriate external measure of comparative data every year or two. Alignment of salary and benefits to offer fair and competitive total compensation must go through an annual analysis across campus to address equity and market competitiveness; broader involvement and reporting regarding this process across the campus is necessary, perhaps through some form of compensation committee.

If the College wishes to be among the best employers in the Mohawk Valley, setting salaries at the regional average is too low an aspiration. Providing an above average benefit package is attractive and helpful for recruitment; however, in today's economic situation, an above average salary may be an even more important consideration in recruiting strong employees. It certainly is an important consideration for the current employees to whom we spoke.

Significantly increasing starting salaries for any group of employees creates issues around perceived fairness both within and between groups of employees. Whenever there is a sizeable increase in starting wages, continuing employees see the difference between their salaries and starting salaries erode, and this can contribute to perceptions of inequity. In addition, the increases in salaries of one group can be perceived, correctly or incorrectly, as the reason that other employees' wages have not increased as substantially. There is considerable concern among all employees about the adequacy of their salaries, wage compression, and fairness; these concerns are particularly pressing for the lowest paid employees on campus. In addition to focusing on remaining competitive in hiring, the College needs to address issues of adequacy and equity of wages, wage compression, and the provision of clear and understandable information about wages, allocation of funds for raises, and evaluation processes.

A number of Staff and Administrators expressed concerns about the systems used for performance evaluation and determining raises. Employees report that there is not a consistent or clearly communicated policy for staff across campus about how pools of money for raises are allocated; some supervisors apparently give all or most of their employees the same raises across the board effectively reducing raises to cost of living adjustments, and others make decisions that more clearly link raises to merit. The perception is that the current systems of allocating raises reward low job performances and outstanding performances with exactly the same raises. Regardless of the accuracy of this perception, its presence reflects a lack of confidence in the

current evaluation process and undermines the role that raises might play in rewarding performance. This perception apparently stems from the widespread beliefs that all employees get the same percentage raise regardless of merit and/or that pooling budgets for raises within staff and administrative departments leads employees to believe they should not exceed expectations because having their achievements recognized with raises would mean their co-workers would be penalized with lower raises. The College needs to clarify in writing the criteria by which staff and administrators are evaluated and the processes used in allocating raises.

#### Supporting Employee Development

*Provide opportunities for all employees to grow and develop at their jobs by making professional development an integral part of employees' jobs.*

Given the longevity of many employees at Hamilton, it is critical that the College support and develop its employees with an eye toward their longevity. Emphasizing and supporting professional development allows the College to recruit from within its own employees, which can be a benefit in a tight job market, and could aid in planning for the replacement of retiring personnel. The College needs to provide opportunities for its employees to obtain on-going training and to attain the skills to advance educationally and professionally.

The faculty have in place funds for professional development including start-up funds for research, travel funds, and grant development funds; faculty members' work schedules are flexible at times, making it easier to fit in development opportunities; additionally, there is a system of promotion in place that does not limit the number of individuals who can be promoted. The College should consider adding a structural entity through which the institutional values of excellence in teaching, student learning and pedagogical innovation are supported. As we look to the recruitment and retention of highly qualified and diverse faculty, a visible institutional commitment to meeting the challenges of the classroom will offer the College a strategic advantage. While the College must maintain a competitive position in regard to supporting development for the faculty, there is also a need for a more systematic examination of the development opportunities for other employee groups.

The opportunities for development and promotion in other job categories are not as extensive or clear-cut, at least according to many of those employees, as they are for faculty. Given the pyramidal nature of many non-faculty job categories--numerous employees in lower level positions and fewer positions toward the top--these employees may find themselves with limited opportunities for advancement. It is critical that the College foster the development of all its employees in order to help employees grow throughout their careers. All employees need equitable access to on-going training to keep their skills up-to-date and to adjust to new technologies and changes in the workplace; time and funding for such training should be made available and built into job expectations and evaluation. In addition, the College could encourage individuals who are interested in advancing in their careers or switching jobs by providing flexibility in the workplace to allow employees to try out or intern in other positions, offering workshops or more extensive courses during less busy times of the year, supporting employee development through a resource center focused on professional development, and rewarding individuals who initiate plans for development. Training and follow-up for individuals promoted to supervisory and managerial positions should be a regular part of the promotion process and not handled on an ad hoc basis. Additionally, professional development could provide opportunities for middle manager/administrators to experience and develop leadership roles.

Our subcommittee believes that Hamilton moves into the process of planning for faculty and staff recruitment and retention over the next five years from a position of strength. Like any dynamic organization, however, Hamilton needs to think about improvements to the workplace that will increase its ability to thrive in a changing world. Our report recommends a number of short-term and practical changes to help foster improved morale and cooperation between

employees and to improve the climate of our workplace. It also lays out some of the longer term demographic and economic challenges that Hamilton will face as it moves into the future; we urge the College to begin to plan proactively for these challenges so that Hamilton is well positioned for recruiting and retaining employees in the future.



APPENDIX 1  
HR Initiatives at Hamilton College

- Employee Satisfaction Survey, 2002
  - Revived Summer Apprenticeship Program
  - Instituted Management Training for Supervisors
  - Management changes in custodial area to increase communication: Recruited experienced manager, added assistant manager
  - Improved equipment
- Employee Satisfaction Survey, 2005
  - Established Community Group to respond
  - Open House Series, HR Coffee Breaks, Summer Ice Cream Program
- Wages
  - Guidelines established by Budget Committee, approx 2002-2003
    - Faculty: AAUP 1\*
    - Staff: At least the regional average, with better benefits
    - M&O: by Union contract
    - Administration: Nationally or regionally competitive, depending on position
  - Monitoring
    - Annually for faculty through report to faculty
    - Regional surveys for staff every 2-3 years
    - Substantial data available for administrative positions through CUPA
    - Ad hoc evaluation of competitive market for specific positions as requested or concerns come to light
  - Wage Pools
    - Established annually
    - Pool spread to give range of raises given based on individual performance
    - Based on
      - Availability of funds through budget process (market ability to increase fees to students)
      - Monitoring of CPI
      - Need for market adjustments
    - Special Market Adjustments
      - Faculty: every year since 2001
      - Staff: 2006-07
      - 2005-06
      - 2004-05
      - 2002-03
      - Administrators: Ad hoc as market pressures warrant
- Benefits
  - Participative
    - Broad-based Health Benefits Group worked on changes when costs were skyrocketing
  - College passes savings to employees
    - No increase in health insurance cost to full-time employees for past two years

- Improvements
  - Established Sick Bank, 1997
  - Dependent Tuition Benefit extended to all employee groups, 1999
  - Established Flexible Spending Account
  - Established Emergency Leave Bank, 2003
  - Expansion of Service Recognition Program, 2004
  - Voluntary Dental and Vision Insurance program added, 2005
  - Established Tobin Awards, 2005
  - Expanded investment choices under TIAA/CREF, 2006
  - Added Employee Assistance Program (EAP) at no charge, 2006
  - Added Payflex card for Flexible Spending, 2008
- Other “premium” benefits
  - Free access to Fitness Center
  - Free Wellness Classes
  - No waiting period for health insurance on hire
  - 10% College contribution to retirement plan
  - Employees eligible to take classes, pursue degree
  - Substantial annual investment in employee professional development
  - Generous vacation, sick, and personal time accruals and carryovers
  - Interest-free computer loans
  - Love Loans provide emergency interest-free loans
  - Continual improvement of work environment via campus facility upgrades