

BEST PRACTICES *in HR*™

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Regulations Clarify Employer Restrictions Related to Wellness Programs

Many employers did not understand the full impact of the Genetic Information Nondiscrimination Act of 2008 (GINA) until this fall, when three federal agencies jointly issued regulations explaining its implementation, according to Sandra R. Mihok, an attorney specializing in employee benefits.

Changes Under GINA

GINA “prohibits group health plans and insurers from collecting any genetic information in connection with plan enrollment or prior to an employee’s effective date of coverage in a plan,” says Mihok, a member of Eckert Seamans Cherin & Mellot, LLC (www.eckertseamans.com). In addition, she says the law prohibits the use of genetic information when setting health insurance rates.

The final interim regulations went into effect on January 1, 2010. Issued by the departments of Labor, Health and Human Services, and Treasury, the regulations clarify that “genetic information” includes the results of genetic tests and family medical history and that the term “group health plan” includes wellness programs, according to Mihok.

“Until the regulations came out, it wasn’t abundantly clear that GINA applied to wellness programs,” she says, noting that “genetic information is typically collected by means of completing a health risk assessment (HRA) in order to participate in a wellness program.”

Previously, when enrolling employees in a wellness program, employers could

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Want Engaged Employees? Help Them Get Their ‘Mojo’ Back

Marshall Goldsmith, world renowned author of the recently published *Mojo: How to Get It, How to Keep It, and How to Get It Back When You Lose It* and international authority on leadership development, declares his operational definition of mojo, “That positive spirit toward what you’re doing now that starts on the inside and radiates to the outside.”

He explains, “Mojo plays a vital role in our pursuit of happiness and meaning because it’s about achieving two simple goals: loving what we do and showing it. It is the moment when there’s no gap between the positive way we perceive ourselves—what we are doing—and how we are perceived by others.”

In today’s economy, organizational leaders, HR professionals, managers and,

yes, employees, may be struggling at times to stimulate their positive spirit, feel engaged, and put forth their best efforts. They, in fact, may need to recharge their mojo.

Goldsmith and his daughter, Kelly Goldsmith, an assistant professor of management at Northwestern University’s Kellogg School of Management, conducted a research study with 3,000 participants to measure meaning and happiness at work and meaning and happiness at home.

Their findings concluded that people who were happy and fulfilled in one aspect of their lives were happy in other aspects of their lives.

“People who see themselves as succeeding at work are the same people who see

(continued on page 2)

Regulations (continued from page 1)

include questions on HRAs about whether participants had a family history of medical conditions, Mihok explains.

Under GINA and its implementing regulations, however, employers may no longer ask those questions during enrollment.

“A lot of employers I talked to were not happy about that,” she says, because those questions were “a big part of identifying potential [health] risks” for their employees.

After enrollment, employers can still ask about family medical history—as long as they do not offer a reward for providing the information, according to Mihok.

In a related matter, Mihok warns employers to be wary of another potential legal problem pertaining to wellness programs.

The Equal Employment Opportunity Commission (EEOC) has issued informal opinion letters stating that employers could run into trouble with the Americans with Disabilities Act (ADA) if completion of an HRA or participation in a wellness program is tied to a reward that is “too large,” such as an overly generous employer subsidy for healthcare premiums.

“They seem to be taking the position that the larger the reward, the more likely it will violate the ADA,” says Mihok.

Given GINA’s provisions, its implementing regulations, and the EEOC’s stance on large rewards, Mihok says employers must first decide whether to continue their wellness program.

Some employers who relied heavily on collecting family medical history information during enrollment and on large rewards have discontinued their programs, but they are in the minority, she says.

What to Do

Mihok offers the following advice to consider:

- **Eliminate prohibited questions.** “Employers need to review their wellness program to make sure the questionnaires are stripped of those questions” related to family medical history, she says.
- **Decide whether to ask questions later.** Employers may ask such questions after enrollment—as long as answering the questions is not tied to a reward.
- **Review wellness rewards.** “Obviously, before instituting any reward, employers should review the reward with counsel,” says Mihok.

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Engaged (continued from page 1)

themselves as succeeding at home, explains Goldsmith.

“This has interesting implications for HR professionals who often think about what the company can do to help increase an employee’s satisfaction.

“I’m focusing on what the individual can do to experience happiness and meaning at work and at home. It’s not a function of the company or job; it’s a function of our [each individual’s] mindset and it’s cheaper than increasing the HR budget.”

Try This Exercise at Work

Starting out with simple exercises as reviewing each meeting and your participation in it after the fact may get you on the right road, suggests Goldsmith.

“Let’s imagine that you’re going to a meeting and you’re dreading it. In

fact, during the meeting you’re in a bad mood. What if you knew that at the end of the meeting, you had to evaluate your experience of happiness and meaning in the meeting?

Plan to ask yourself just two questions—‘How happy was I at this meeting’ and ‘How meaningful was this meeting?’

“My prediction is that you’ll act differently, rather than just being miserable in the meeting and making everyone around you miserable.

“You’ll say, ‘How can I make my experience in this meeting as meaningful and happy as possible?’ You won’t be perfect but you’re going to get better each time because you’re thinking about it.”

This change in mindset puts you in charge of your behavior and attitude. A Mojo Scorecard is available on www.mojothethebook.com that allows you to score every activity of your day against professional mojo

components (motivation, knowledge, ability, confidence, and authenticity) and personal mojo components (happiness, rewards, meaning, learning, and gratitude).

For each activity, you score yourself with the number 1 to 10 (10 being the highest) in each component.

As you review your scores in your activities, you will see patterns emerge, and you can begin working to change your behaviors, notes Goldsmith.

Teaching your employees to do this as well can increase employee engagement and help them to achieve more happiness and meaning in their work and in their lives.

Goldsmith concludes, “We can change the way we view ourselves in the world; we can change the way we act; and we can change our mojo.”

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Continuous Recognition and Constant Communication Foster Success

I Love Rewards, Inc., offers a work culture of recognition based on strong company values. The Toronto, Canada-based, organization creates employer branded, online rewards and recognition programs for other companies that increase employee engagement.

“If you recognize your employees [if you appreciate them], they will become engaged,” states Employee Experience Manager [aka HR Manager] Cathy Leblanc.

The values that the company leaders and 44 employees abide by are passion, exceeding expectations, integrity, transparency, continuous improvement, and sharing. The values are evident in the open communication, the shared company goals and, of course, the rewards and recognition practices.

Daily Meetings

It starts with the daily To The Point (TTP) Meeting, structured as a 9-minute, all-staff event; a best practice that keeps staff aligned and focused on common goals and company strategy, explains Leblanc. She shares the elements of TTP, which begins with a quick introduction by a facilitator (a staffer who volunteers to “host” the meeting). Next come Headlines, or brief tidbits of information that are I Love Rewards related, industry-related, or an important personal headline that someone wants to share.

Next on the TTP agenda is Department Spotlight—expanded news with top highlights, key departmental metrics, and trending of departmental metrics. Each department is spotlighted every 2 weeks and comes to TTP prepared to share, notes Leblanc. After departmental news is shared, employees are invited to name their most important task—or SMART (specific, measurable, attainable, realistic, and tangible) task—to be accomplished that day, in a segment

called Today’s Top 1. Finally, anyone with a specific problem or idea is encouraged to share it with the group during the last item on the TTP agenda, a time of open communication called PAUSE (which stands for places I’m stuck, a red flag, unique opportunities, broken systems, and education). The TTP “is a great avenue for communication,” Leblanc explains. “Everyone in the company participates.”

Friday Social Events

Each week an employee volunteer hosts “First Round Friday” (FRF), which is held after the workday ends. It is a purely social occasion for employees to get together at the end of the workweek to enjoy alcoholic and nonalcoholic beverages, says Leblanc. “Sometimes there’s a theme; for example in October, I had “October Fest” as a theme, and it included German beer. Someone else did Halloween so people could dress up if they wanted.”

Employee anniversaries are announced at TTPs and celebrated at FRFs with a manager, and often a co-worker, speaking about the employee who is having an annual anniversary with I Love Rewards.

When company sales goals have been met in the prior month, there is also Second Round Friday held once a month (after FRF ends). All the employees are treated to a dinner by the company; the thought being that all employees work together to make company sales goals, notes Leblanc.

The Point System

Employees also receive rewards in the manner of points for everything from doing an exemplary job of living a company value, to providing sound sales leads from their networks of connections outside the company, to referring prospective employees (receiving rewards when a job candidate is interviewed and

Who: I Love Rewards, Inc.

What: Has created a values-based work culture of open communication and employee recognition for achievement and living organizational values

Results: I Love Rewards is ranked the #3 recognition company globally and #1 Web-based recognition company (*Human Resources Outsourcing, October 2009*).

another reward if/when the person is hired), says Leblanc. In the case of the sales lead, if a lead culminates in a new client company relationship, the employees also receive (in points) 1 percent of the sales revenue for the first 6 months.

“Points are redeemable for brand-name products, services and experiences,” explains Leblanc. She notes that last year she redeemed points for an airline ticket to Argentina. “If you give cash bonuses to employees, they spend it on bills or groceries, but if employees redeem points for a large-screen TV, they’ll remember that whenever they walk by it or someone comments about it.”

Employees can also reward points to each other, but they can also recognize co-workers regularly without points, noting specific jobs that are well done.

I Love Rewards (www.iloverewards.com) has been honored with several awards, including being named as a global leader in workplace democracy by the WorldBlu List of Most Democratic Workplaces™.

Leblanc advises HR executives wishing to build a culture of recognition and rewards: “It’s important to create a culture of recognition, but also to tailor it and customize it to your specific organization. Make your culture reflect your values and make it reflect who your people are because of your culture. Make it work for your employee base. Try something new and take some of our ideas and use them in a way that makes your organization work.”



Demoted Female Executive Alleges Sex Discrimination

A female executive, who had been re-assigned to a position with less authority, later sued her employer, alleging that her supervisor had discriminated against her on the basis of sex.

What happened. In 1970, “Gabrielle” was hired by the Federal Aviation Administration (FAA). Over the next 25 years, she worked her way up through the ranks, eventually being named director of the Office of Communications, Navigation, and Surveillance Systems in 1995.

In that Senior Executive Service (SES) position, she supervised 269 federal employees and about 500 contractors, had oversight over 96 programs, and managed a \$300 million-plus budget.

About 2 years later, she was reassigned to the FAA’s Office of Information Technology to serve as program manager for the Year 2000 (Y2K) Project. In that capacity, she was responsible for supervising four federal employees and four contracts, and she reported to one of her former peers. She had no budget.

In a June 12, 1997, memo about his decision to reassign Gabrielle, an associate administrator for research and acquisitions assured her that this was a lateral move and stated that her “background and technical knowledge” could be very helpful with the Y2K Project.

However, he also cited her “fail[ure] to provide ... direction and support,” “allowing [a] program to languish” as well as her general lack of “leadership qualities.”

After only 6 months in her new job, Gabrielle took early retirement. She later filed suit against the U.S. Department of Transportation (DOT), alleging that the reassignment constituted sex discrimination in violation of Title VII of the Civil Rights Act of 1964.

A magistrate judge granted summary judgment to DOT, but the U.S. Court

of Appeals for the District of Columbia reversed the decision, saying that a reasonable juror could conclude that Gabrielle had suffered an adverse employment action and could infer that the action was prompted by discrimination.

After a jury trial, the jury found for DOT, and the magistrate judge denied Gabrielle’s motion for a new trial. She filed a second appeal with the appeals court.

What the court said. This time, the appeals court affirmed.

Gabrielle had argued that the magistrate judge had erred by improperly instructing the jury on what constitutes an adverse employment action under Title VII, by not instructing the jury that it could infer that missing DOT evidence would be unfavorable to the agency, by denying her motion for a new trial, and by depriving her of a “fair and impartial” trial.

The appeals court concluded that the magistrate judge did not abuse her discretion on the claims related to the jury instructions. Regarding the first claim, the court said, “... [T]he magistrate judge correctly instructed the jury on the relevant legal theory. The fact that she did so without including the precise language ... [Gabrielle] requested was not an abuse of discretion.”

Federal fair employment laws, including Title VII of the Civil Rights Act of 1964, prohibit employment practices that discriminate on the basis of sex. The law prohibits sex-based discrimination in hiring, advancement, or any other terms or conditions of employment.

Title VII covers all public employers and private employers with 15 or more employees. Many states have similar laws that apply to employers with less than 15 employees.

In addition, the court agreed with the magistrate judge that a new trial is not warranted. “... [T]he record contains more than enough evidence to uphold the jury’s determination that... [Gabrielle’s] reassignment was not an adverse employment action... [She] retained her pay grade and her SES status, and there is evidence that her new position—far from harming her current or future professional prospects—in fact proved vital, visible, and prestigious.”

Finally, the court said there was no evidence of “a high degree of favoritism or antagonism” in the magistrate judge’s comments, and as such, there is no need to reverse the decision on Gabrielle’s claim that she was denied a fair trial (*Czekalski v. LaHood*, U.S. Court of Appeals, D.C. Cir., No. 08-5431 (12/29/09)).

WHAT TO REMEMBER

Put it in writing. Develop a clear, written policy against discrimination, and make sure all your employees are familiar with it.

Establish a process for lodging complaints. In this case, it was not clear whether Gabrielle made allegations of sex discrimination before she took early retirement from the FAA. However, it is important for employers to provide multiple ways

for employees to report discrimination and harassment and then to thoroughly and promptly investigate such complaints.

Train managers. Make sure they understand that they cannot base reassignment decisions on an employee’s gender or other category protected under Title VII (e.g., age, race, color, national origin, religion, and disability).

Career Development Really Is Multifaceted Partnership

It's not the responsibility of corporate leadership or HR alone to offer a successful career development program. It's a multifaceted partnership between empowered employees, organizational leadership, managers, and the HR function. "It's a partnership among the individual, the manager, and the organization, meaning HR and the line leaders," stresses Beverly Kaye, consultant, author, and founder and CEO of Career Systems International.

Kaye describes her "3-S model" for the partnership: The individual is the spark and describes what he or she wants; the manager is the support and listens to the employee, finding out the development needs; and the HR function and organization provide the system/structure for development.

The Role of Employees

The key, however, is that career development begins with the employees. Kaye suggests five things that individuals need to do to take charge of their career:

1. Become knowledgeable and current about organizational change, changes in the industry and profession and their implications, and be able to reinvent [repackage] skills and strengths in light of those changes.
2. Understand their unique contributions to the organization, and articulate those skills, interests, passion, values, and strengths [to managers, leadership, and HR staff].
3. Understand their reputations in the organization, and solicit feedback from others in order to grow and make changes that make them more valuable to the organization.
4. Develop options that are relevant and actionable, including growing in their current jobs and thinking about what skills could be broadened, enhanced, built, and retooled to keep them on the cutting edge of their professions.

5. Create action plans with the steps required to propel them forward, such as identifying a learning agenda and moving through it, as well as using available organizational training and classes and necessary outside resources to increase skills and experience.

"Managers need to be curious about the total talent bank ..."

Kaye explains that in many cases, employees should consider lateral moves that will help them to revitalize their careers and keep new possibilities open in the organization.

She says that individuals should ask, "Is there a way to move laterally to increase my expertise, to increase my view of the world, to work with someone else or for someone else and therefore, to grow?" Doing this might, in fact, increase their chances of promotion down the road when opportunities open up.

The Role of Managers

The managers' role in supporting career development of their team members is also important. Managers empower their employees to make learning choices by translating the changing forces going on in their departments and in the organization so that their team members understand what the changes might mean to the employees' careers, stresses Kaye.

"Managers also need to be curious about the total talent bank that an individual has and move away from seeing an individual locked into a particular assignment or role," says Kaye. "Find out what else an individual wants and needs."

She explains that managers should also provide ongoing reality checks to each team member, providing feed-

back and encouraging staff to solicit the feedback of others in the organization regarding their work output and behaviors.

Managers must also provide opportunities for employees to grow in place, particularly in the current international economy, comments Kaye.

"Think about the kinds of assignments, the kinds of things that individuals can do to keep their skills the most up to date that they possibly can. "Managers have an important role in positively impacting the employees' performance, attitudes, commitment, and discretionary effort for the organization, as well as employee retention."

The Role of HR

HR's role in career development is to provide the systems and structure for career development, notes Kaye. That may include training managers in coaching and mentoring techniques to help them support the career goals of the employees on their teams.

"It's partly the responsibility of HR and also senior managers to hold the feet of the managers to the fire to know the extent of the talent on their teams [and to support employees' development]," asserts Kaye.

The Role of Leadership

Organizational leadership's responsibility in the multifaceted career development partnership is to broadcast the kinds of change that they can see ahead to managers and staff, notes Kaye. "They must be willing to give employees opportunities to try new areas and to capture the individual requests that employees share for what they want to do."

To access many free articles, white papers and case studies, visit Kaye's company website at www.careersystemsintl.com. Click on "Resources" in the left menu.

Tips & Tactics

Job Satisfaction Continues on a Downward Trend

In an annual job satisfaction survey by The Conference Board, 45 percent of respondents said that they are satisfied with their jobs, down from 61.1 percent in 1987, the first year the survey was conducted.

Workers of all ages and incomes continue to grow increasingly unhappy, explained Lynn Franco, director of the Consumer Research Center of The Conference Board. "Through both economic boom and bust during the past 2 decades, our job satisfaction numbers have shown a consistent downward trend."

The report noted that real average household incomes grew at an annual rate of 2.0 percent in the 1980s, 2.1 percent in the 1990s, and -0.2 percent since 2000. Health insurance contributions may provide one explanation for this decline in income.

"Among workers receiving employer-provided health insurance, three times as many have to contribute toward the cost of their coverage as did in 1980," the report states. Although income is only one predictor of employee satisfaction, the decline of real income could have a significant impact on employee well-being and happiness.

On a positive note, the report found that "Americans still like their co-workers, though not as much as they did when the survey began. Respondents rank their fellow employees as the second most satisfying aspect of their jobs (their commute is ranked the most satisfactory aspect). And 50.6 percent remain satisfied with their supervisor, though this is down from 60.1 percent in 1987."

A critical message highlighted by The Conference Board in the report is that challenging and meaningful work is vitally important to American workers. The report noted that the drop in the number of respondents who find

their work interesting is nearly identical to the drop in job satisfaction over the 23 years that the survey has been in existence: "This seems to indicate that employees largely judge the overall quality of their jobs in terms of the degree to which they are challenged or stimulated. Additionally, considering that 'job design' is the most powerful influence on overall employee engagement, this drop likely has an impact on employees' views of the organization beyond perceptions about the job itself."

Increase Job Satisfaction

The Conference Board report provided recommendations to employers to stem this negative job satisfaction trend. A few of these are:

- Provide employees with rotational assignments to break any perceived monotony and recharge their appreciation for their jobs.
- Provide work assignments that exercise employees' intellect. The Board's research has found that more often than not, the challenge of rising to meet intellectually difficult demands serves to enhance most employees' perceptions of their jobs.
- Focus attention on the impact of the work employees perform on the entire team, the department, their business unit, and the entire organization. Employee communication strategies provide context for the importance of each given role, offering employees insights into why their particular jobs are important and how their specific efforts make a difference.

The results of the survey, conducted among 5,000 households, were released in a report titled "I Can't Get No ... Job Satisfaction, That Is" in January 2010. For more information about the survey and report, visit www.conference-board.org and click on "Publications" in the left menu, then on "Research Reports."

Benchmark Your Screening Practices Against Other Employers

The retail industry experienced a 1.89 percent decline in discrepancies for county criminal searches in the first three quarters of 2009, according to a "Screening Benchmark Report for the Retail Industry," released in late December 2009 by First Advantage Corporation, a global risk mitigation and business solutions provider. The report stated, "The discrepancies, in this case, may be due to applicants not revealing or inaccurately relaying their criminal history as recorded in county court records."

Another screening result uncovered by the survey was that discrepancies with education verifications decreased from 23.5 percent in 2008 to 16.38 percent during the first 9 months of 2009. Discrepancies with education averaged 23.43 across all industries. "Education discrepancies may be the result of an applicant misrepresenting their education or not correctly supplying dates of attendance, status and/or degree earned," according to the report.

The retail industry is one of the largest employment sectors in the United States with 15.3 million jobs in 2008 and expectations that this number will increase to 16 million by 2018, the Bureau of Labor Statistics notes.

Paige Vesuvio, vice president of Marketing for First Advantage, comments that retailers experience above average employee turnover and seasonal hiring patterns that make it critical for them to have a good screening program in place to identify potential threats. "The report offers retailers the opportunity to evaluate their current employment screening practices against their industry peers, identifying steps to improve their programs."

While the report focuses on the retail industry, it includes helpful tips for employers in any industry in which employees regularly handle money or interact with customers. The report may be downloaded at no cost by visiting www.fadv.com/pdf/RetailBenchmarkReport_screen.pdf.

Special Perks for Accountants Help During Busiest Time of Year

With its accountants typically working 60 hours per week during the busiest weeks of “tax season,” Barfield, Murphy, Shank & Smith PC understands the additional strain those long hours put on them and their families.

So from January through mid-April, the Birmingham, Alabama, public accounting firm provides special benefits that promote work/life balance among its 105 employees.

Focus on Work/Life Balance

“When our three founding shareholders created the firm in 1991, they were young professionals starting their own families. Their goal was to establish an accounting firm that allowed for career development and well-balanced lives outside work,” says Emily Dunlap, Human Resources coordinator for Barfield, Murphy, Shank & Smith (www.bmss.com).

“Our firm was established with a family-friendly culture where employees have a successful career that supports the employee’s greater role in life, including the role of parent or spouse.”

The firm offers a variety of year-round work/life benefits, including an on-staff professional valet who performs concierge services for employees. “She is a full-time employee of the firm who works throughout the year and runs errands for our employees,” Dunlap explains.

“These errands range from picking up dry cleaning to waiting at the employee’s home for a repairman. The employees know they can rely on this service to assist with their busy lives and they really appreciate it.”

Other year-round benefits include flex-time and part-time schedule options, alternate Fridays off in the summer, complimentary snacks and drinks, a 1-month paid sabbatical after 10 years with the firm, 3 paid volunteer days per year, and wedding and baby showers, according to Dunlap.

During tax season, the firm also provides massages on 3 separate days, Dippin’ Dots® ice cream for 2 weeks, weekly lunches and dinners, a corporate deadline party after March 15, and an annual April 15 cookout, she says.

Since accountants are asked to work on Saturdays during the busiest weeks, the firm also pays for on-site child care on Saturdays during tax season as needed. “If there is a need for it, we will provide it,” Dunlap says.

Child care, typically by administrative employees and college-age children of employees, is provided in the firm’s training room whether an accountant works 2 hours or 8 on a Saturday, according to Dunlap.

“When we are working 55 to 60 hour weeks, the accountants are asked to work at least 2 hours on Saturday,” she says. “Some employees work most of their hours Monday through Friday and only work 2 hours on Saturday. Others work less during the week and work 6 or 8 hours on Saturday. It depends on the employee.

“We have also offered ... [child care] on snow days when schools close,” she adds, “but there aren’t too many of those in Birmingham.”

Dunlap says employees appreciate the additional benefits offered to them during tax season, and she notes that awards the firm has received, including being recognized as 2009 Top Small Workplace by *The Wall Street Journal* and Winning Workplaces, are based on employees’ responses to surveys.

Other accolades within the past couple of years include being named one of the “Best Places to Work” and an “Innovator in Human Resources” by *Birmingham Business Journal*, as well as being ranked among the “Best Accounting Firms to Work For” by *Accounting Today* magazine.

Dunlap says it is important to offer special benefits during the busiest

Who: Barfield, Murphy, Shank & Smith, PC

What: Provides special perks during tax season in addition to year-round benefits that promote work/life balance

Results: Low turnover. High morale.

time of the year “to show the employees how much we truly appreciate their dedication and commitment to the firm and to our clients.”

The tax season and year-round benefits have helped the firm achieve low turnover and high employee morale, according to Dunlap. In addition, “[t]hese factors, along with others, have given us great success with our campus recruiting efforts.”

Seek Input, Address Needs

Implementing work/life initiatives is beneficial both to employees and employers. Here are a few points to consider for launching new initiatives or strengthening existing work/life programs:

- **Support employees throughout the year.** By identifying and introducing benefits that promote work/life balance in employees’ daily lives, you will demonstrate your commitment to them and your appreciation for their hard work.
- **Consider additional perks during peak seasons.** No matter what type of industry you work in, you likely have a time of year that is particularly busy for employees. Be aware of their extra workload during these times and find ways to help minimize the additional work/life issues they face.

Dunlap recommends asking employees directly about the types of support that would be most useful to them. “Talk to employees and find out what they want and what would help them do their jobs better.”

HR Tool Box

Top 10 Tips for Reducing Meetings Costs in 2010

Companies recognize the importance of face-to-face interaction, but in this recession, they are looking to do meetings in a more cost-effective way. Steve Auer, CEO of Cadence, Inc. (www.cadence-inc.com), a meeting planning and event production company, has assembled these top 10 tips for cost reduction in 2010.

- 1. Outsource.** Do things you personally need to stay involved with and outsource everything else. Look for areas where your time can make the most impact and focus energy on those activities. Leverage outside resources to do everything else.
- 2. Get accurate.** Employ a more detailed registration system. Reducing the headcount on breakfasts for people who want only coffee and skipping meals for walk-in attendees translates to big savings.
- 3. Eliminate a meal.** Eliminating a meal does affect the budget, but it's not a popular choice. Attendees' need to coordinate dinner plans fosters networking. If company policy dictates three meals, consider asking for a suspension or review; a per diem will go farther than a banquet budget.
- 4. Shop locally.** Local sales reps for a hotel or venue will work harder and can provide significant savings over a national rep or broker. They often can offer incentives unique to their property. Or consider outsourcing the process to a meeting planner on an hourly or fee basis.
- 5. Consolidate.** If budgets are tight, use one or two vendors as much as possible. Your project will look bigger and garner more attention, and you'll save time and money. Every vendor you add requires hours of management time, especially if there are changes, so any small savings are not significant.
- 6. Be creative.** Find something that doesn't really cost the hotel or vendor and leverage it. For example, airport transfers can sometimes be provided at no charge if a hotel has buses, saving in transfers or cabs. Also think about asking for free printing from the hotel's business center for savings on print and shipping.
- 7. Lean on your suppliers.** In today's economy, suppliers are hungry for additional work and willing to take on additional responsibility. So ask them for small tasks and expertise, such as an extra person for the registration desk.
- 8. Buy in bulk.** Hotels and vendors want repeat business, and they're willing to discount to get it. Use that to your advantage. Negotiate rebates that kick in retroactively once you reach a certain level. There's no commitment because if you don't deliver the business, they don't have to deliver the discount.
- 9. Share.** Splitting costs with another group is an easy and savvy way to get your numbers down. Brokering the deal can be challenging, so be somewhat flexible. Need a match? Often your planner, the hotel, or even a supplier, can find the right company.
- 10. Don't cram.** The only "don't" on our list addresses the temptation to pack 12 hours of meetings into an 8-hour day. This will drain your attendees. The effectiveness of the meeting is the primary goal—if attendees are engaged, the meeting generates business results.

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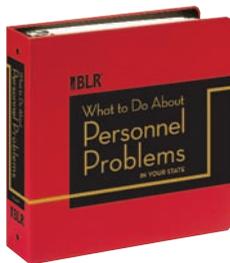
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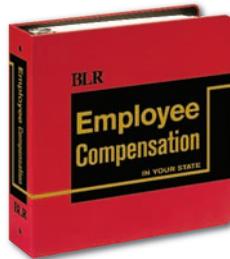
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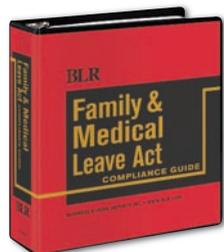
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