KY CUPA-HR
Fall Conference 2023

Radisson Hotel - Cincinnati Riverfront
Covington, Kentucky
September 20-22, 2023

Approved Provider for SHRM-CP & SHRM-SCP PDC’s
Approved Provider for HRCI (Pending) Credits

The HR Certification Institute has pre-approved this activity for recertification credit towards the aPHR®, PHR®, PHRca®, SPHR®, GPHR®, PHRi® and SPHRi® certifications. The content of the activity submitted has met the criteria of the Approved Provider Program.
THANKS TO OUR CORPORATE PARTNERS

Premium Plus

Segal

Premium

Anthem

DELTA DENTAL

Basic

CAPTRUST

TIAA

Hirezoni Exchange
SCHEDULE OF EVENTS

Wednesday, Sept. 20

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
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<tbody>
<tr>
<td>3:00—5:00</td>
<td>Registration &amp; Corporate Partner Set-up</td>
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<tr>
<td>4:30—5:00</td>
<td>Welcome Reception</td>
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<tr>
<td>5:00 - 6:30</td>
<td>Opening Keynote - <strong>Employ-Joy: A Stronger Workforce Starts with You</strong> - Lauren Pasqualone</td>
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<tr>
<td>6:30—8:00</td>
<td>Dinner at Hotel</td>
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<tr>
<td>8:30 - 10:30</td>
<td>Hospitality Suite</td>
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Thursday, Sept. 21

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<tr>
<th>TIME</th>
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<tr>
<td>7:30—8:30</td>
<td>Breakfast at Hotel (Included with room rate)</td>
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<td>(If you are not staying at hotel please see a board member about breakfast voucher)</td>
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<tr>
<td>8:00—8:30</td>
<td>Registration &amp; Corporate Partner Set-up (Ballroom A)</td>
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<tr>
<td>8:30—8:45</td>
<td>Welcome and Corporate Sponsor Introductions</td>
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<tr>
<td>8:45—9:45</td>
<td>Session I</td>
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<tr>
<td></td>
<td>&quot;Putting Employ-Joy into Action&quot;</td>
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<tr>
<td></td>
<td>Lauren Pasqualone</td>
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<tr>
<td>9:45—10:00</td>
<td>Break and Visit with Corporate Partners</td>
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<tr>
<td>10:00—11:00</td>
<td>Session II</td>
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<tr>
<td></td>
<td>&quot;Rocking Your Retirement Plan!&quot;</td>
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<td></td>
<td>Meredith Bruner (Centre College), Matt Hass (TIAA), &amp; Nate Cassel (PlanPILOT)</td>
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<tr>
<td>11:30—12:30</td>
<td>Lunch (Salon C)</td>
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<tr>
<td>12:30—1:00</td>
<td>Session III</td>
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<td>&quot;I Didn't See that Coming: Navigating the World of Disabilities</td>
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<tr>
<td></td>
<td>Personally and Professionally&quot;</td>
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<tr>
<td>1:00—1:15</td>
<td>Break and Visit with Corporate Partners</td>
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**SCHEDULE OF EVENTS**

**Thursday, Sept. 21, Continued**

<table>
<thead>
<tr>
<th>TIME</th>
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<tbody>
<tr>
<td>1:15—2:00</td>
<td>Session IV</td>
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<tr>
<td></td>
<td>&quot;The Empathy Experience: Interactive Workshop&quot;</td>
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<td></td>
<td>Stephanie Jones &amp; Jamila Watson</td>
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<tr>
<td>2:00—2:45</td>
<td>Session V</td>
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<tr>
<td></td>
<td>&quot;Disability Inclusion in Action: Activation Session&quot;</td>
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<tr>
<td></td>
<td>Jamila Watson (FedEx Services)</td>
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<tr>
<td>2:45—3:00</td>
<td>Break and Visit with Corporate Partners</td>
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<tr>
<td>3:00—4:00</td>
<td>Session VI</td>
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<td></td>
<td>&quot;CUPA-HR Research: Your Data Resources for Workforce Planning &amp; Decisions&quot;</td>
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<tr>
<td></td>
<td>-Diana Tubbs, CUPA National Office</td>
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<tr>
<td>4:00—5:00</td>
<td>Session VII</td>
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<tr>
<td></td>
<td>&quot;Southern Region/ALP Update&quot;</td>
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<tr>
<td></td>
<td>Donna Henry, University of Kentucky, Chair Southern Region CUPA Board</td>
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**Friday, Sept. 22**

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<tr>
<th>TIME</th>
<th>EVENT</th>
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<tbody>
<tr>
<td>7:00—8:00</td>
<td>Breakfast: Hartland Cafe (Included with room rate)</td>
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<tr>
<td>8:00—8:30</td>
<td>Chapter Update</td>
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<tr>
<td>8:30—10:00</td>
<td>Session VIII</td>
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<td></td>
<td>&quot;Why it Matters&quot; with Dr. Kimberly A. Luse</td>
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<tr>
<td>10:00—10:30</td>
<td>Break and Room Check-Out</td>
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<tr>
<td>10:30—11:45</td>
<td>Session IX</td>
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<td></td>
<td>&quot;The Importance of Employee Input on your Institution's Total Rewards Offering&quot;</td>
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<td></td>
<td>Norm Jacobson - Segal</td>
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<tr>
<td>11:45—12:00</td>
<td>Closing Remarks</td>
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SESSIONS OVERVIEW

**Employ Joy: A Stronger Workforce Starts with You**
Lauren Pasqualone

From recruiting to onboarding and employee retention, HR lays the foundation of an institution's culture. There's an unexpected tool you can use to strengthen the foundation - JOY! Research shows a culture of joy creates a more productive, unified, and satisfied workforce across an organization. Different from happiness that depends on good circumstances, joy is an ever-present source of motivation that stands up to change, challenges, and setbacks. Joy-n Lauren in this dynamic presentation to find out how to put joy to work for your institution.

You'll learn;
- The difference between short-term happiness and lasting joy, and why the distinction matters.
- The science behind joy and how to use it to your organization's advantage.
- The thieves of joy to watch out for in the workplace & tactics to keep them at bay.
- Essential questions to audit your organization's current level of joy.
- Actions and ideas to get started creating a culture of joy.

**CUPA-HR Research: Your Data Resource for Workforce Planning and Decisions**
Diana Tubbs, Ph.D., Survey Researcher CUPA-HR

CUPA-HR is collecting more data than ever before to help you address strategic issues around recruitment, retention, salary increases, salary compression, diversity, pay equity, and more. Need to create a salary range for a new position? Benchmark salary increases for a single position or group of positions? Compare your institution’s turnover statistics with others? Plan for scaling up or down a department’s size? Get the facts on representation and pay equity for women and people of color? We have the data for that! In this presentation, members of the research team will familiarize you with all the data resources available to you in our new Research Center and DataOnDemand and will show you some of the new data and trends we have collected and identified. These resources will help you be the go-to source for workforce data at your institution, enable you to address challenging problems, and keep your finger on the pulse of higher ed workforce trends.

**The Importance of Employee Input on your Institution's Total Rewards Offering**
Catharine Hamrick and Norm Jacobson with Segal

Session will address challenges and how to overcome them
- Improving their attraction and retention by obtaining valuable employee input on total rewards using a new innovative focus group approach.
- Improving the value of your total rewards offering by knowing what your employees value and focus areas for improvement and/or reallocation of your institution’s resources

Session Takeaways
- Why it's important to solicit feedback from their employees/participants
- Methods for gathering feedback - and the advantages/disadvantages of each
- Introduction to an innovative platform for conducting online focus groups with up to 1,000 employees/participants at once
- How online focus groups have made a difference, through a case study at Denison University

**Why it Matters!**
Dr. Kimberly A. Luse, Ed.D; RT(R)

President and Founder of Strategic Ethical Solutions and Executive Director of Fisher-Nightingale Houses, Inc., Dr. Kimberly Luse returns to Kentucky CUPA HR Conference to talk about, Why it Matters. How do you really examine your moral compass, values, non-negotiables and then align your career goals so they are in agreement? As the workplace becomes increasingly global it is also critical to to address cultural fit questions. Have you been wrestling with any of these issues? Dr. Luse will help you discover solutions.
Session Overview Continued…

I Didn’t See that Coming: Navigating the World of Disabilities Personally and Professionally
Stephanie Jones

For many of us, we have chosen paths of education and training for careers in which we expect to have the skills and knowledge to handle the everyday tasks presented. We have resources available to handle those slightly different tasks, but rarely have to engage outside of the carefully planned radius we have set around ourselves. Many times, this means we have unintentionally limited our engagement to those who look like us, think like us, act like us, and function like us.

So, what truly happens when our engagement meets someone outside of our radius — specifically, someone who has different abilities or, possibly, is even thought to have little to no abilities? While you can easily pass these types of situations on to someone else, in our roles as HR professionals and those tied to higher educational opportunities, we often are the individuals that set the tone for and influence the culture of the workplace. However, this does not mean we have all the answers for handling these different situations nor that we’ll be comfortable doing so.

Let’s face it, we all go through the required disability awareness training. We are aware of diversity, equity, and inclusion policies. The purpose of this session is to help you move beyond the trainings and policies and step into the reality of someone with a disability — with the candid and open dialogue that will empower you to handle what you might not have seen coming.

This session will:
• introduce you to the world through the eyes of a person with disability, specifically blindness,
• address misconceptions concerning individuals with disabilities, and
• identify strategies and resources to better engage the world of disabilities.

The Empathy Experience
Stephanie Jones & Jamila Watson

Engage in specially-designed activities that will challenge your current mindset of the disability world and provide insight on ways to engage this community.

In this session, you can expect to:
• discuss myths and misconceptions concerning the disability community and how these notions can affect our perceptions and possibly influence our engagement with this community,
• explore the ripples in our society that disabilities may directly or indirectly initiate, and
• identify resources and accommodations possible for individuals with disabilities to live a holistic life with an emphasis on living, working, and playing with a disability.

Disability Inclusion in Action
Jamila Watson

Let’s move beyond the “what” and “so what” — and on to the “now what.” In this activation session, explore and think through opportunities to unlock real opportunities for activating disability inclusion in your role and within your organization.

In this session, you can expect to:
• uncover specific strategies and tactics to further internalize and activate what you’ve learned and experienced,
• learn best practices for socializing and evangelizing disability inclusion within your organization, and
• start creating your customized disability inclusion call-to-action and strategy plan.

Rocking Your Retirement Plan!
Meredith Bruner (Centre College), Matt Hass (TIAA), & Nate Cassel (PlanPILOT)

We all offer a retirement plan as part of our benefits package, but now-a-days job seekers are looking for more than just your average 401(k) or 403(b) plan to participate in. This post-COVID labor market has made all employers go back to the drawing board when it comes to differentiating benefits packages — especially retirement plan options. Many creative ideas have been swirling around HR offices and brought forward to retirement plan reps and consultants for consideration, vetting and (hopefully) implementation. In this session we will discuss some of the unique tweaks and changes for retirement plans to consider but aren’t sure how (or if) we can/should implement. We’ll look at these options from the Plan Sponsor perspective, the Retirement Plan Provider perspective and the Retirement Plan Consultant perspective.
Session Overview Continued….

INFORMATION ABOUT OUR SPEAKERS

Meredith Bruner, joined Centre College as the Payroll and Benefits Coordinator in the Human Resources Office in September of 2007, was promoted to the Human Resources Operations Manager and Regional Director of the Greater Kentucky Higher Education Recruitment Consortium (HERC) in January of 2018 and in September of 2022 was promoted to Assistant Director of Human Resources. Meredith currently serves as an at-large board member of the Kentucky Chapter of CUPA-HR, is the President of the Central Kentucky SHRM Chapter and is also a national SHRM member. In her regional directorship with HERC she also sits on the HERC Advisory Board, the HERC Governance Board and Chairs the HERC Finance Committee. Meredith is a 2000 graduate of the University of the Cumberlands with a B.A in Business Administration and an emphasis in management and a minor in psychology.

Nate Cassell, Nate has over 30 years retirement plan service experience in all aspects of retirement plans. Since joining PlanPILOT in 2013, he has been an integral part of the consulting team, responsible for advising key relationships in the educational and non-profit space focusing on fiduciary governance, plan design, employee communications, record-keeper reviews, implementation of new record-keepers, vendor oversight and investment due diligence. Nate began his retirement plan career as an actuary with a large benefits consulting company that is now part of Willis Towers Watson. Nate has also spent 8 years managing the retirement plans for a large Chicago-based retailer, and 14 years creating and selling retirement plan investments for First Trust Portfolios. Nate earned a Bachelor of Art in Mathematics and Economics from Wheaton College. When not talking about retirement plans, he can be found in his back yard smoking meat or stoking up his pizza oven.

Matt Haas, a Sr. Director, Sr. Relationship Manager at TIAA (tiaa.org), a Fortune 100 financial services organization and leading provider of asset management and retirement services for the academic, research, medical and cultural fields. Matthew is part of the client relationship team responsible for managing the overall client relationship with our institutions by leading key initiatives that support and improve the customer experience. Matthew began his financial services career in 2000 and has been with TIAA since 2002. He serves our institutional clients in the State of Kentucky from the local Lexington, KY TIAA office. Matthew holds a Bachelor of Business Administration from the University of Kentucky and a Master of Business Administration from Bellarmine University. He holds FINRA Series 6, 7, 24, 63 and 66 registrations while maintaining Life, Health and Variable Annuity licenses from the State of Kentucky.

Catharine Hamrick, is Vice President, Senior Consultant in Segal Benz's Chicago office. Driven by a passion to make a positive difference in employees' lives, Catharine has been an HR communicationis professional for more than 15 years. At Segal Benz, she passes along her expertise to clients in a range of industries, including tech, higher education, public sector and multi-employer benefit funds. Some of her clients include; The Walt Disney Company, DuPont, Honeywell, Equity League Benefits Funds, and the State of Illinois. Catharine has always been motivated by her belief that benefits have a direct impact on employees' health and wealth. And because of the important role benefits play, it's vital to grab employees' attention and get them engaged with the plans and programs available to them. She leads our work with online focus groups and is responsible for efforts to grow communications opportunities in the Midwest. Ms. Hamrick joined Segal Benz almost four years ago after more than 10 years at Alight Solutions (formerly part of Aon Hewitt), which is a human capital and benefits consulting firm what works with more than half of the Fortune 500 companies. As Client Lead for Consumer Experience, she created dynamic strategies focused on getting results, developed total rewards brands designed to get noticed, and delivered high impact, multi-channel communication campaigns for major corporations. Some of her clients included; Allstate, Best Buy, Cintas, McDonald's, Target and United Technologies. Ms. Hamrick earned a BA in Political Science from Vanderbilt University and an MA in Government from the University of Notre Dame.

Donna Henry has been with the University of Kentucky for almost 23 years. Her emphasis on university employee benefits began about 19 years ago. Donna has worn many hats in UKHR's Employee Benefits Office; becoming a Benefits Generalist of sorts. Today, Donna is the Benefits Customer Service and Data Supervisor where those many different roles have come together. She served on the KY-CUPA board for 10 years starting out with the treasurer position and holding the chair position. Donna currently serves as the President of the southern regional CUPA board.
**Information About The Speakers Continued…**

**Stephanie Jones,** After losing her sight in 2006, Stephanie Jones found new direction for her personal and professional lives. Stephanie is on a mission to change the world for those with disabilities, focusing on the blind and visually impaired community. In her role as a vision rehab professional, Stephanie empowers her students to find their independence and joy for living while receiving training in the skills they need to pursue employment. She is also the co-owner of an accessibility solutions company, Menus4ALL. In November 2022, the company launched its first iOS app which provides 1 million accessible restaurant menus throughout the United States and Canada.

**Norm Jacobson,**

**Kimberly Luse,** is a leader who has spent decades studying people, leading at the highest level of organizations, and seeing how both high-performing and low-performing organizations operate. Dr. Luse is an author of Losing Your Job Without Losing Your Mind: Strategic Ethical Solutions and Circling the Drain: A Story of Hope, Lost Children, and Finding Home. She brings her life journey and experiences into the world to inspire, engage, and build authentic relationships. Her expertise in trauma-informed care and mental health is something that so many in our world need, and we are excited to have her join us today. She is also the president of Strategic Ethical Solutions™. With more than 25 years of experience in the medical field and higher education arena, she brings a unique skill-set to the table. As a medical professional, she served in the clinical setting specializing in peripheral and cardiac angiography and Magnetic Resonance Imaging. After service in the clinical setting, Dr. Luse began to teach her craft, originating the MRI section of the Advanced Medical Imaging Program at the University of Cincinnati. Turning to the administrative side of the organization, she held roles in both private and public colleges and universities as well as serving as an administrator in the community college setting at Cincinnati State Technical and Community College. Dr. Luse has extensive experience in executive leadership serving as a top advisor to university presidents and chancellors. Additionally, she has served in corporate positions as a government relations lead, and secretary to governing boards in the organizations she represented. As an accomplished speaker, Dr. Luse has more than two decades of experience leading presentations in her areas of expertise. Organizations including, The Association of Governing Boards of Universities and Colleges, GlobalMinded, The Cincinnati Metropolitan Housing Authority, and The American Society of Radiologic Technologists are among those who have recruited Dr. Luse as a presenter. She and her husband, are parents to six children, and twelve grandchildren, and reside in the Greater Cincinnati area.

**Lauren Pasqualone,** is trusted by organizations nationwide to shape more productive, innovative and resilient workforces by fostering a culture of joy. Her 20-year experience includes training more than 1,000 independent businesses and working with powerhouses like the Super Bowl, Tampa Bay Buccaneers, a US Senator and more. Lauren currently serves as Executive Director for the Calhoun County Chamber of Commerce, where she’s leading the rural community’s economic development and recovery following a devastating Category 5 hurricane. Lauren’s keynotes and workshops have been hailed as energetic, memorable, spunky and fun — not to mention informative and inspirational. She carries her energy and expertise from the stage to the written word and is an Entrepreneur Leadership Network contributor. Lauren finds joy in her husband, teen daughter, spoiled dog, RunDisney races and singing (which does NOT bring joy to the teen). Get to know her at laurenpasqualone.com.

**Diana Tubbs,** PhD, is a Survey Researcher at CUPA-HR where she collects data, analyzes data, and writes content to disseminate timely and critical information about the higher ed workforce. Through research, Diana’s goal is to provide actionable, data-driven evidence for institutions and employees alike. Diana’s research background includes expertise in employee health and wellness, workplace interruptions, and organizational readiness for change. Outside of work, Diana enjoys cooking, playing pretend with her daughter, and reminding herself of her new year’s resolutions. Diana earned her B.A in psychology from Wellesley College, and a Ph.D in industrial-organizational psychology from the University of Connecticut.

**Jamila Watson,** brings 25 years to her Insights & Research Advisor role at FedEx Service, where she leads global end-to-end research efforts with a primary focus on customer-centric innovation and design initiatives. She also serves as a FedEx Culture Ambassador and DEI Delegate, leading Culture Action Team and diversity, equity and inclusion related efforts for her team and organization. A sought-after industry enthusiast, Jamila has presented at numerous research conferences and was honored as the first-ever “DEI Champion” in 2022 by the North Central Chapter of the Insights Association. Outside of work, Jamila leans heavily into service through her engagement with local community and non-profit organization, wearing numerous “fascinators” across a fulfilling mix of boards of directors as well as steering and programming committees. With a desire to make a meaningful impact within the community in which she works, lives, plays and serves, Jamila is currently engaged with the Delta Gateway Foundation, Metropolitan Club (NKY), Greater Cincinnati Foundation’s Cincinnati Black Giving Circle, YWCA Greater Cincinnati and the Cincinnati Alumnae Chapter of Delta Sigma Theta Sorority, Inc.

Get to know her at http://www.linkedin.com/in/jamilawatson
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