UNIVERSITY STAFF ADVISORY COMMITTEE
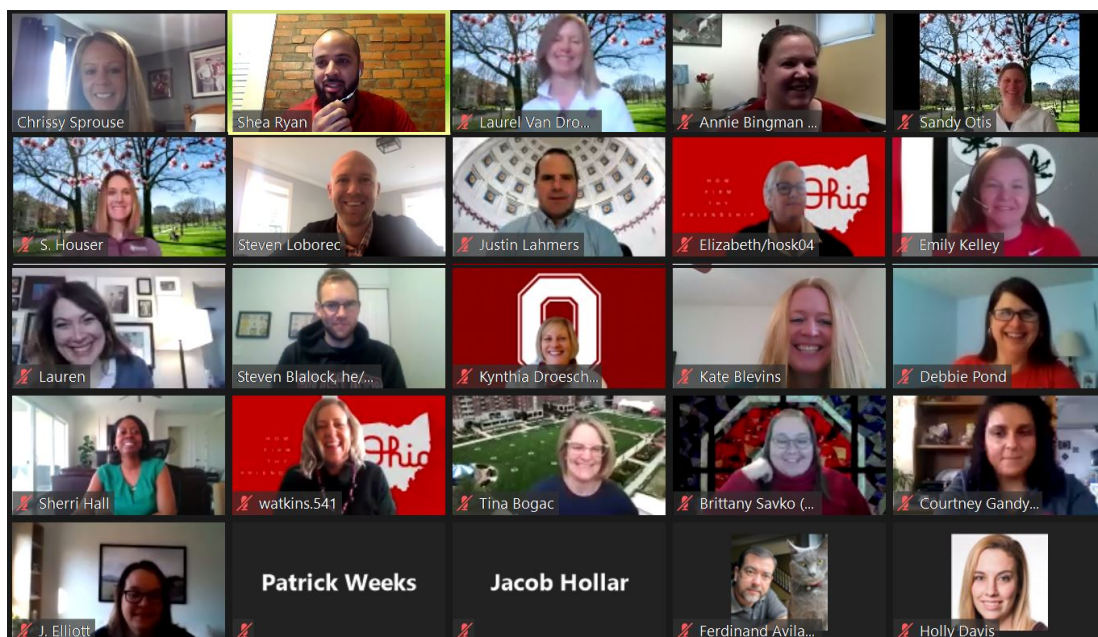
Annual Report 2020-2021

THE OHIO STATE UNIVERSITY

Table of Contents

Date: April 21, 2021

From: University Staff Advisory Committee (USAC), 2020-2021
   Chrissy Sprouse, Chair
   Steven Loborec, Chair-Elect
   Laurel Van Dromme, Vice-Chair Secretary/Treasurer
   Shea Ryan, Vice-Chair Communications

To: Dr. Kristina M. Johnson, President, The Ohio State University

Subject: University Staff Advisory Committee (USAC) 2020-21 Annual Report

The 2020-21 year for the University Staff Advisory Committee (USAC) has been productive, transparent, adaptable, and most importantly intentional. During a year in which many of us never expected by facing challenges of a global pandemic, USAC not only continued existing partnerships but also created new partnerships with a variety of key leaders, University initiatives and staff to advance the mission of the University. USAC is appreciative for the plethora of opportunities to engage positively with President Johnson and other leaders across the enterprise.

As the President's staff advisory committee, USAC is dedicated to positively advocating on behalf of staff while continuing to deliver on our multi-year plan that was established in 2017. The consistency in our vision and focus over the past four (4) years not only strengthens our efforts and progress but also provides transparency in our initiatives and focus to the university community. Many of our triumphs have been due to the strength of our four (4) subcommittees and their ability to strategically think on a wide-range of initiatives of ways to enhance the staff experience. Their dedication to the work of USAC is paramount to the success of our advocacy.

Fiscal year (FY) 2021 has marked a challenging year for all as we continued to adjust to our changing environments and the University's response to the COVID-19 pandemic. Our mission was more critical than ever as we continued to engage with leadership and advocate on behalf of staff.

The 2020-21 USAC Annual Report offers updates and closures on recommendations made previously, including the Winter Recess Proposal. The report highlights the ways in which USAC fostered meaningful staff engagement through our advocacy work and outreach.

Over the years, USAC has made recommendations to senior leaders regarding key initiatives. The work required to fully implement USAC recommendations can take several months. Below is a status update to the recommendation made from the 2019-20 USAC Annual Report.

Winter Recess
Background
In 2019, USAC proposed the addition of three floating holidays as a low cost, high impact benefit to staff. USAC spent the year collecting time-off benefit data from twenty-six (26) peer institutions, institutions across the Big 10, and large local corporations that Ohio State must compete with for talent. A summary of the benchmarking conducted are available in Appendix A: Winter Recess Proposal.

USAC's recommendation is for an academic core closure at The Ohio State University beginning on December 24th and running through January 2nd allowing employees to have an extended period of time off. The proposed name for the closure is "Winter Recess".

If adopted, Winter Recess would become part of Ohio State's ongoing efforts to fulfill the strategic plan with a specific emphasis on "Operational Excellence and Resource Stewardship". Pillar V states that "Ohio State will be an exemplar of best practices in resource stewardship, operational effectiveness, and efficiency and innovation". By closing non-essential functions during this time period, Ohio State will improve resource stewardship, operational effectiveness and efficiency by:

- Demonstrating an increase in energy cost savings
- Increasing efficiency and productivity
- Improving staff morale and mental health
- Improving recruiting and retention efforts
- Linking with the Ohio State's Wellness Initiative

Key Accomplishments
Benchmarking and significant research were conducted on implementing a Winter Recess at the University in 2020. Research indicated that providing a shutdown period during the holiday season not only supported wellness initiatives but also provided sustainability advantages. Benchmarking revealed that most Big 10 universities shut down during the holiday season. The **Winter Recess Proposal** was presented to President Michael V. Drake in April 2020 prior to his departure along with various senior leaders throughout the course of 2019-20. The proposal was introduced for consideration with the knowledge that certain issues needed clarified prior to initiation. Dr. Drake was supportive of continuing to investigate the potential of a Winter Recess. Due to the implications of COVID-19 and the initiation of Workday, it was decided to place the initiation of Winter Recess on hold for 2020. In the Fall of 2020, members of Staff Affairs began to answer questions presented by Dr. Drake and senior leadership that needed clarified, including the following questions:

1. Do we need a separate set of guidelines for the Health System?
2. Who is considered "Essential Staff" and will be required to work during Winter Recess?
3. How will staff be paid during Winter Recess? This depends on whether the staff member is exempt or non-exempt; essential or non-essential.
4. Do temporary and student employees receive pay for Winter Recess?
5. If an employee is on unpaid FMLA, would the employee be allowed to change the designation of FMLA and be compensated for Winter Recess?
6. Can essential personnel who work/are scheduled to work during Winter Recess re-designate their time off prior to Winter Recess?
7. What are the financial implications of providing staff with additional paid time off?
8. What impact will this have on the regional campuses with shared resources?

In order to discuss these lingering issues, meetings were conducted with pertinent units, including Medical Center Human Resources, Office of Legal Affairs, as well as regional campuses.

Work Remaining
In order to fully address remaining questions, meetings continue to occur with the following constituents:

- Office of Human Resources
- Regional Campuses to discuss regional campus impacts
- Business and Finance to discuss financial implications
- Central Ohio Technical College (COTC) to discuss potential impacts for cost-shared appointments
- Office of Student Life to discuss impacts to staff due to students remaining on campus
- Facilities Operations and Development (FOD) to discuss implications to buildings remaining open during this time

When meeting with the Office of Legal Affairs, it was suggested that a policy be in place prior to implementing Winter Recess. Research related to policy development will also need completed. Once outstanding issues are clarified, a document with frequently asked questions will be drafted as well as proposed language updates to the Paid Time Off Policy (6.27). USAC would like to propose a Winter Recess implementation of Winter 2021.

Appendix A: Winter Recess Proposal

USAC is committed to frequent engagement with staff and maintaining a consistent voice advocating on behalf of staff. The chart below summarizes key initiatives and focus areas for 2020-21. These areas align with the pillars of USAC's multi-year plan to help cultivate our mission. The intent is to update this plan quarterly to ensure our focus is aligned with the University's and HR's strategic plans as well as key University initiatives.

- Continue to prioritize our efforts in the four existing subcommittees: Governance, Inclusive Excellence (IE), Outreach and Engagement (O&E), and Staff Affairs (SA)
- Focus on diversity and inclusion to create a culture of equity for staff across the University
- Cultivate relationships with key leaders to represent the needs of staff
- Enhance our involvement with the Enterprise Project, Career Roadmap, Shared Values Initiative, as well as other University-wide initiatives
- Increase and maintain staff presence in University governance
- Increase collaboration with staff advocacy groups across the university as well as the Big Ten Academic Alliance

This chart emphasizes USAC key initiatives and activities that are a priority to USAC.

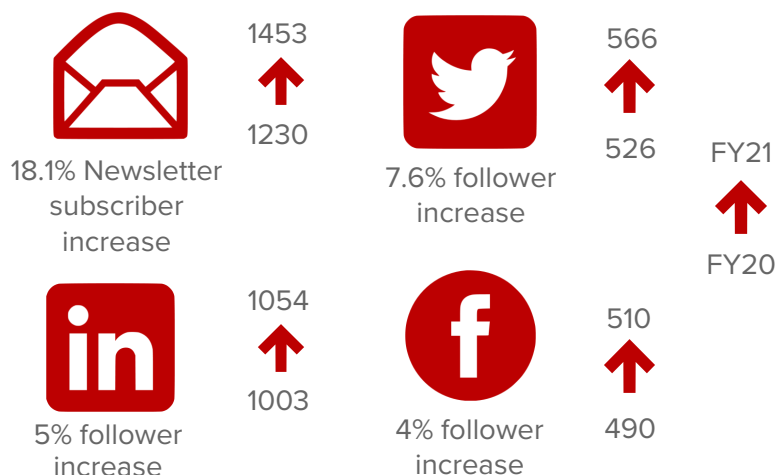| #	USAC Initiative* *Continuously evaluated to align with the Ohio State and HR Strategic Plans	Status	USAC Pillars (YE Report)				Strategic Alignment			FY21			
			Sr Leaders	University Transformation	Constituency Group*	Direct Staff Impact	Ohio State Strategic Plan	HR Strategic Plan*	USAC Mission	Q1	Q2	Q3	Q4
1	Cultivate relationships with senior leaders	!	☑	☐	☐	☐	✔	✔	✔	•	•	•	
2	University Shared Goverance	!	☑	☑	☐	☑	✔		✔	•	•	•	
3	Involvement in University leaders search committees	!	☑	☑	☐	☐	✔		✔		•	•	
4	Big Ten Staff Advocacy Collaboration	!	☐	☐	☑	☐			✔	•	•	•	
5	USAC Communications	!	☑	☑	☑	☑	✔	✔	✔	•	•	•	
6	USAC Internal Review	!	☐	☐	☐	☐			✔	•	•	•	
7	**Governance focus areas**												
	Staff Career Development Grants	!	☐	☐	☐	☑		✔	✔	•		•	
	Reinvisioning Manager Professional Development Opportunities	!	☐	☐	☐	☑		✔	✔	•			
	Increased D&I focus across all USAC processes/procedures*	!	☐	☐	☐	☑			✔	•	•	•	
	Appointment and participation in external committees	!	☐	☑	☐	☑			✔	•			
	University Policy Review/Updates	!	☐	☑	☐	☑		✔	✔	•	•	•	
	USAC Bylaw Review/Updates	!	☐	☐	☐	☑			✔		•	•	
	University Staff Senator Engagement	!	☐	☑	☑	☑			✔	•	•	•	
8	**Outreach & Engagement focus areas**												
	Staff Appreciation Events	✅	☐	☐	☐	☑			✔	•			
	Stuff the Backpack Event	✅	☐	☐	☐	☑			✔	•			
	Conversation with Leadership Series	!	☑	☐	☐	☑	✔	✔	✔	•	•	•	
	Regional Campus Engagement	!	☐	☐	☐	☑			✔	•	•	•	
	Engagement with College/Unit Based Staff Advisory Committees	!	☐	☐	☐	☑			✔	•	•	•	
	Staff Benefits and Wellness Expo	❌	☐	☑	☐	☑			✔				
	Professional Development Series	!	☐	☐	☐	☑		✔	✔	•	•	•	
9	**Staff Affairs focus areas**												
	Health & Wellness	!	☐	☐	☐	☑	✔		✔	•	•	•	
	Rewards and Recognition	!	☐	☐	☐	☑			✔	•	•	•	
	Enterprise Project	!	☐	☑	☑	☑	✔	✔	✔	•	•	•	
	Increased partnership with PPCW	!	☐	☐	☑	☑			✔	•	•	•	
	Gender Equity	!	☐	☐	☐	☑	✔	✔	✔		•		
	New Employee Engagement	❌	☐	☑	☑	☑		✔	✔				
	Flexible Work Toolkit	!	☐	☑	☑	☑		✔	✔		•	•	
	Time off/Leave policy	!	☐	☐	☑	☑		✔	✔	•	•	•	
10	**Inclusive Excellence focus areas**												
	Collaboration across various campus D&I groups	!	☐	☐	☑	☑	✔		✔	•	•	•	
	Listening Sessions	!	☑	☐	☐	☑			✔	•		•	
	Improve partnership with w/PPCW, Senate Diversity and ODI	!	☑	☐	☑	☑			✔	•	•	•	
	Increased engagement with ERGs	!	☐	☐	☑	☑			✔	•	•	•	
	USAC Diversity Development	!	☐	☐	☐	☑			✔	•		•	
	Increased partnership with OHR Learning & Development	!	☐	☑	☑	☑		✔	✔		•	•	
11	**USAC Ambassadors**												
	New USAC Member Engagement	!	☐	☐	☐	☑			✔	•	•	•	
	Community Outreach Engagement	!	☐	☐	☐	☑			✔	•			

*New Initiative for FY21

Preparing Staff for Change

As the University continued progress towards the implementation of HR Transformation and the Enterprise Project, it has been paramount for USAC to support these initiatives and prepare staff for change especially during these unprecedented times. During this time of organizational, procedural, and budgetary change coupled with a pandemic and societal injustices, emotions of fear and uncertainty were heightened across the university. To lead staff through change, USAC increased communication efforts on information pertaining to University initiatives as well as partnered with various constituents across campus to support or highlight information, initiatives and/or events relevant to staff. In addition, USAC continued to foster relationships with local and regional Staff Advisory Committees (SACs) by attending virtual committee meetings.

These committees are the heart of the colleges and units and because of this, have a pulse on staff concerns and morale. Information shared within these meetings was communicated to University leadership, as appropriate, to aid in communication efforts toward change. With USAC having an increased on-line presence in FY21 there was a tremendous importance in having a consistent output of communication efforts.

1453
1230
18.1% Newsletter subscriber increase

566
526
7.6% follower increase

FY21
FY20

1054
1003
5% follower increase

510
490
4% follower increase

Furthermore, USAC sought to amplify messaging of various campus partners whenever possible in order to keep staff engaged on any changes taking place at the University. By maintaining a focus on USAC's communication efforts, FY21 saw positive growth in subscribers and engagement over our various virtual platforms, which USAC projects to continue into the next fiscal year.

Aside from attending SAC meetings and increased USAC communication to staff, USAC also hosted a Local and Regional SAC Retreat on Friday, April 9, 2021 via Zoom, which is the first time that all campuses were present at a USAC retreat and included forty-two (42) attendees. Speakers and topics included:

- Bern Melnyk, University Chief Wellness Officer and Dean, College of Nursing discussed the importance of wellness in addition provided an update regarding the Return to Campus Survey results
- Gates Garrity-Rokous, Vice President and Chief Compliance Officer, and Kim Potter, Director of Policy and Engagement, The Office of University Compliance and Integrity provided an overview of the Shared Values Initiative (SVI)
- Molly Peirano, Interim Title IX Coordinator, Office of Institutional Equity provided an overview of the office as well as updates to the Title IX policy
- Tom Gessells, Director of Informational Technology, OSU Health Plan and Staff Senator provided an overview of University Senate as well as the Staff Senator role

Breakout discussions were facilitated by USAC members and addressed topics mentioned above. Local and Regional SAC members contributed to robust and meaningful conversations that sparked additional dialogue with presenters that will initiate more concrete partnerships across the university as work continues on these important initiatives. USAC's Inclusive Excellence and Staff Affairs subcommittees also facilitated
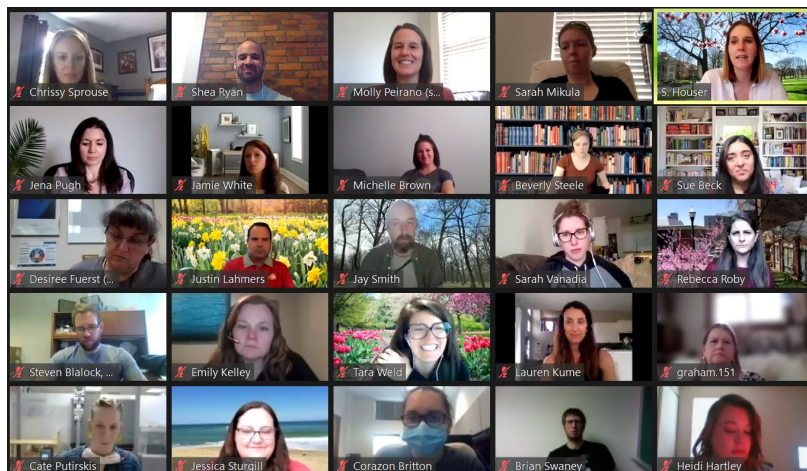
listening sessions to provide updates on current initiatives and to hear of potential gaps in advocacy efforts. Overall, Local and Regional SAC members felt that their voices were heard, appreciated the dialogue with leadership, and are eager to support these initiatives moving forward within their perspective campuses/colleges/units.

Communication efforts are not limited to external constituents to USAC, USAC also focused internally within the committee to create a cohesive environment as it was evident that we would not be meeting in-person this year. Members received "USAC Weekly Updates" from the USAC chair which contained updates in regards to University initiatives, highlights from University leadership and committee meetings, status updates on USAC initiatives as well as general information in relation to staff. In addition, USAC members were spotlighted throughout the course of the year to learn more

about each other and were provided monthly opportunities to virtually engage via Zoom during USAC Hang Out sessions.

Advocacy Efforts
In a year of COVID-19 and societal injustices, the University formed multiple task forces focused on these important topics. As task forces formed, USAC leadership ensured a staff representative was a part of these important conversations. Because of our consistent approach at ensuring staff are present, a USAC member was added to the Public Safety Advisory Committee which is a new University committee within the Department of Public Safety.

While preparing for returning to campus in the fall, the Office of Academic Affairs and the Office of Human Resources formed multiple task forces around various topics such as academic transition, benefits, leave, and policy updates. During discussions, USAC members consider any potential impacts to staff and discuss alternate solutions, if possible. USAC also partnered with various task forces across campus such as the Task Force on Racism and Racial Inequities and the Task Force on Community Safety and Well-Being to ensure our efforts aligned with the work of these task forces.

In addition to ensuring staff representation on University committees and task forces, USAC looks at University processes to see where staff presence is missing. In doing so, USAC partnered with Bruce McPheron, Executive Vice President and Provost, and Kay Wolf, Senior Vice Provost, to ensure that a staff member was not only a part of the search committee for Dean appointments but now a staff member will be a part of the Dean's Reappointment Review Process.

During 2020-2021, University leadership changes were announced which led to the formation of several search committees. Of these national searches, USAC members and Staff Senators have the privilege to serve on the following search committees:

USAC/Staff Senator	Search Committee
Chrissy Sprouse, Chair	Executive Vice President and Provost
Steven Loborec, Chair-elect	Sr. Vice President of Talent, Culture and Human Resources
Andrew Jordan, Staff Senator	Vice President and Chief Information Officer

To ensure the staff perspective was heard, a listening session was conducted in conjunction with Gene Smith, Senior Vice President and Wolfe Foundation Endowed Athletics Director, on March 15, 2021 regarding the Executive Vice President and Provost position. Forty-five (45) current and former USAC members and Staff Senators provided valuable insight on the qualities and traits that the search committee should consider as it relates to staff and the University at-large. The feedback provided was well received by search committee co-chairs Dr. Susan Olesik, Divisional Dean of Natural and Mathematical Sciences and Distinguished University Professor and Dr. Grace Wang, Executive Vice President for Research, Innovation and Knowledge Enterprise, and shared with the search committee.

Throughout the course of this unprecedented academic year, USAC's advocacy efforts were more important than ever. Through various channels, staff contacted USAC to voice concerns or provided feedback on numerous topics such as: COVID-19, Workday, tuition assistance benefit changes, mental health, retirement impacts for staff who teach, parking, and returning to campus. As concerns and feedback were received, USAC worked with university leadership and were able to advocate for the following changes:

- Reversal of the tuition assistance benefits change. Maximum number of credit hours remain unchanged at ten (10) credit hours
- Addition of salary ranges to job postings for campus staff and bi-weekly positions in Workday
- Deepened discussions among leadership in regards to COVID-19 cases on campus
- Extension of the exception to the use of accrued vacation over the established maximum carryover from Dec 31, 2020 to June 30, 2021. This extension provides employees flexibility until their next anniversary to utilize accrued vacation over the maximum

In addition, USAC partnered with Lin Hillis, Associate Vice President Talent, Leadership and Diversity, and Erica Banta, Talent Management Director, within the Office of Human Resources to create additional professional development opportunities for staff. As of mid-May 2021, staff will have access to thousands of resources through LinkedIn Learning, an on-demand learning solution designed to help gain new skills and advance their career. With a one (1) year LinkedIn Learning subscription, staff will obtain:

- Unlimited access. Choosing from more than 5,000 video tutorials covering business, creative and technology topics
- Relevant recommendations. Exploring the most in-demand skills based on interest
- Expert instructors. Learning from industry leaders, all in one place

Appendix B: 2020 Tuition Data Summary

The **Staff Affairs Subcommittee (SA)** is responsible for engaging with policies and university initiatives and promoting equity for staff. This is accomplished through data collection, education, and partnerships with organizations across the university. The topics addressed include, but are not limited to, staff benefits, career progression, and health and wellness.

USAC Member Name	Staff Role	College/Unit
Sandy Otis, Chair	Asset Business Analyst	Business & Finance
Stacey Houser, Vice-Chair	Interim Sr Dir, Risk Mgmt & Chief Risk Officer	Business & Finance
Tina Bogac	Senior Director, EHS	Administration & Planning
Brittany Crall	Business Manager 2	Office of Student Life
Holly Davis	Research Commons Services Coord	University Libraries
Jacob Hollar	Associate Editor, Strategic Communications	Office of Student Academic Success
Faith Kline	Administrative Director	Comprehensive Cancer Ctr
Justin Lahmers	Quality Improvement Specialist	Office of Research

In 2020, at the request of the USAC Executive Committee, Staff Affairs assessed work on many goals and initiatives from previous years. As a result, Staff Affairs identified the following goals that would drive much of the subcommittee work throughout 2020-21:

- Winter Recess
- Rewards & Recognition
- Flexible and Remote Work
- Staff Ombudsman

REWARDS & RECOGNITION
Background
Research shows that praise and commendation from managers was rated the top motivator for performance, beating out other non-cash and financial incentives, by 67% of workers[1]. As noted in the 2017-18 USAC Annual Report, the resolution to the Rewards and Recognition Task Force was to maintain status quo with university-wide events managed by OHR.

During 2018-19, USAC collected feedback from units across campus related to staff awards and recognition offered at the unit and department level. Information collected helped guide conversations around integrating recognition activities at a grassroots level in order to promote a culture of recognition university-wide. USAC designed a **"6 Easy Ways to Appreciate Your Team"** infographic to encourage units and managers to promote rewards and recognition activities within their unit. This infographic suggested high impact, low-cost ways that unit-level managers and staff can incorporate rewards and recognition into their daily practices.

[1] "Motivating People: Getting beyond Monday, 2009"

Appendix C: 2017-18 USAC Annual Report
Appendix D: Rewards & Recognition Infographic

Key Accomplishments

Building from the rewards and recognition work completed in 2018-19, Staff Affairs explored implementing a university-wide staff recognition program. The goal was to highlight employees that strive to bring out The Ohio State University best practices in others, someone who excels as an individual employee and team player and makes an impact in The Ohio State University community.

Staff Affairs researched current programs among various colleges and business units to ensure this program would be unique to the community. Through research and much discussion, Staff Affairs implemented a monthly **USAC Staff in the Spotlight**, in which communication efforts launched in December 2020. Each month, USAC makes a call for nominations from the University community to nominate a staff member that fulfills the key qualities, traits, and characteristics that demonstrate excellence and have an impact. Essentially, nominating a staff member who exemplifies going above and beyond.

Once a nomination is received, Staff Affairs members utilize a rubric to consistently evaluate the nominations based on answers to the following three questions:

- Why does the employee deserve to be a USAC Staff Spotlight?
- How does the nominee demonstrate excellence for The Ohio State University?
- What is the impact the employee has at The Ohio State University?

The two (2) individuals with the highest scores are selected to be featured as the current month's **USAC Staff in the Spotlight**. However, before selected staff are notified, Staff Affairs confirms with partners in OHR that these staff members are in good standing within their roles and the university. Once confirmed, a brief 'get to know you' email is sent to the selected nominees in which answers will be used in the 'Staff Spotlight'. The final recognition will be in the monthly *USAC Newsletter* as well as other University communications.

As of the beginning of April 2021, USAC is pleased that eighteen (18) nominations from across the university were received with four (4) staff members being spotlighted.

THE OHIO STATE UNIVERSITY

Staff Spotlight
University Staff Advisory Committee

In your own words, describe your job here at Ohio State.
I lead and am a member of the Residence Life team. We are responsible for the residential experiences of our students, staff and guest on our Columbus, Newark, Wooster and Mansfield campuses. We strive to create extraordinary experiences by using an inclusion lens with all that we do.

What do you love most about Ohio State?
I love to engage with students through opportunities like STEP, student group meetings, events and community walkthroughs.

What is your favorite memory as a staff member at Ohio State?
My entire first year at OSU!

What do you enjoy doing outside of work?
I enjoy spending quality time with my partner, family and friends.

What is something that most people don't know about you?
I have written well over 100 poems and I hope to publish some of them one day.

What is your favorite quote, TV show, movie, or book?
- Quote – "And we know that all things work together for good to them that love God, to them who are the called according to his purpose." Romans 8:28
- TV Show – Good Morning America
- Movie – Love Jones
- Book – The Bible

Nominated by the Associate Directors of Residence Life
As the Interim Director of the Office of Residence Life, Dr. Smith has "worked tirelessly to present a vision which would define her leadership as encompassing of all staff by first listening to them and then finding ways to move our unit forward collectively. Dr. Smith achieved this by maintaining a high degree of transparency and by not only listening to staff but by enlisting their skill and leadership in the process. She too never lost sight of our ultimate goal, enhancing the lives of our students by putting forth initiatives that would allow them to maximize their academic and personal successes.

Name Qiana Perrean Smith, PhD.
Title Interim Director of Residence Life
Department/College/Unit Residence Life/Office of Student Life
Years of Service 4 years

The pandemic, Black Lives Matter, social injustices as well as the tumultuous political climate of 2020, necessitated a very special leader to acknowledge, reflect and care for staff and students while at the same time move us forward. Dr. Smith did this amazingly well and provided all staff with opportunities for reflection and feedback. During these unprecedented times, many would have understood merely maintaining the status quo while dealing with the chaos but Dr. Smith, in addition to navigating these times, continued to move us forward by promoting new initiatives related to inclusive excellence, strategic initiatives and an upcoming program review. All of this was done with grace while cultivating an atmosphere of positivity and self-care for staff and students."

Next Steps
Each month, Staff Affairs will continue to work with communication partners to promote nominations of staff members specifically focusing on under-represented groups on campus and to ensure diversity is exhibited among nominations including roles within campuses/colleges/departments/units.

FLEXIBLE WORK REMOTE WORK
Background
The current Flexible Work policy (6.12) has been in place at Ohio State since 2011. As stated in the policy:

> "Workplace flexibility provides a way to successfully manage people, time, space, and workload. The university supports flexible work arrangements to achieve a highly productive work environment that enables staff to balance work and personal needs while providing workforce predictability and stability. Workplace flexibility is a strategy for using resources most efficiently and providing the best environment for talent."

While the policy is clear about the possibility of and benefits to a flexible working arrangement, the execution of this policy is inconsistently applied throughout the University. To address this gap, USAC and the President and Provost's Council on Women (PPCW) began collaborations in Autumn 2018 which ultimately resulted in the creation of a **Flex Work Toolkit**, a valuable resource that managers and employees can utilize when having conversations around flex work. The toolkit is housed on the USAC website and includes the following resources:

- Flex Work Power Point, to provide an overview of the policy
- Flex Work Scenarios, to help employees better understand the possible application of the policy to their specific situations
- "How to Discuss Flex Work with Your Manager" guide, to discuss communication strategies, performance tools, and negotiation tips to help set up a flexible work arrangement
- Flex Work Spotlight video, to highlight the successes of individuals and units who have successfully implemented flexible work arrangements

Appendix E: Flex Work Toolkit Overview

Key Accomplishments
In 2020, COVID-19 impacted the University community and current in-person work settings shifted to an online platform. Staff Affairs and PPCW continued collaboration on the **Flexible Work Toolkit** by taking a deeper dive into the flexible work opening statement to include additional language to support remote work and job share.

Previously, the flexible work opening statement on the USAC website stated:

> Flexible work arrangements are becoming part of a modern work environment. Ohio State University currently has a Flexible Work policy (6.12) that allows employees to propose a flexible work arrangement. Colleges and units across campus have successfully navigated integrating flexible work into their workplace culture.

13

Workplace flexibility provides a way to successfully manage people, time, space and workload. Studies have shown that flexible work arrangements can increase productivity, employee engagement and improve work-life balance.

With continued partnership with PPCW, the flexible work opening statement on the USAC website now states:

Flexible work arrangements are part of a modern work environment. Ohio State University currently has a Flexible Work policy (6.12) that allows employees to propose a flexible work arrangement that meets their personal needs and the needs of their employing unit. Colleges and units across campus have successfully navigated integrating flexible work into their workplace culture. Workplace flexibility provides a way to successfully manage people, time, space, and workload and helps recruit and retain our valuable employees. Studies have shown that flexible work arrangements can improve productivity, employee engagement and work-life balance. Examples of "flex work," include, but are not limited to, the following arrangements:

- A telework agreement or remote work agreement is used when some or all work hours are completed at the individual's home or other alternative remote environment. Employees are expected to maintain their regular work schedule as if they were working from their primary assigned working location.
- A flexible work agreement is used when an employee has requested a workplace or schedule modification. Examples include working four 10-hour days or changing standard hours in order to take a class.
- A job share arrangement is used to allow two employees to work part-time to create a full-time job, sharing job responsibilities.

Next Steps

Continue to promote the Flexible Work Toolkit and encourage leadership to think about the possibilities and benefits of remote work.

STAFF OMBUDSMAN

Key Accomplishments

Given the changing environment across the University, Staff Affairs explored the concept through extensive research and benchmarking across various Big Ten and peer institutions around the creation of a Staff Ombudsman position at The Ohio State University. The role of an ombudsman is to receive grievances, apprehensions, and/or inquiries that could vary around a variety of topics such as indiscretions, discrimination, workplace climate, career progression issues and/or broader university problems, while providing the upmost form of confidentiality. The ombudsman would serve as an independent resource and objective mediator to staff by interpreting university policies and identifying available resources.

Direct Impact to Staff - Staff Affairs

The Office of Human Resources and the Office of Institutional Equity are more formal channels for staff to engage; however, staff may feel apprehensive in approaching these offices and prefer a more confidential informal conversation with a neutral party for counsel and recommendations. With the creation of the Office of Ombuds Services at The Ohio State University, faculty and graduate and professional students have a dedicated ombudsman serving in this role to help bring emerging trends from issues brought to their attention to university leadership; however, staff do not have a dedicated ombudsman to facilitate this same type of service.

Appendix F: Ombudsman Benchmarking

Next Steps

Continue to conduct research and benchmarking across peer institutions and encourage university leadership regarding the need for a Staff Ombudsman position within the Office of Ombuds Services so that faculty, staff and students are represented fairly and appropriately.

15

The mission of the **Governance Subcommittee** is to support the USAC leadership team in the facilitation and oversight of USAC policies and procedures to execute the goals of USAC. The following are the 2020-2021 Governance priorities and focus areas for the year:

- **Staff Career Development Grant Program and Staff Career Manager Program:** In collaboration with the University's Office of Human Resources (OHR), continue to implement the grant program to positively impact staff and their professional development during the COVID-19 pandemic;
- **Staff Senator Selection Process:** Continue to facilitate and plan the application, interviewing, and selection of staff candidates to the University Staff Senator role for the upcoming academic year;
- **External and Senate Committee Appointments:** Ensure that staff across the university are provided the opportunity to serve on a variety of University and Senate committees to highlight and develop their expertise and knowledge on a specific area of the university;
- **Bylaw and Operations Manual Review and Updates:** Oversee and lead the bylaw and operations manual review process as required by current USAC bylaw language;
- **USAC Support:** Continue to support the USAC Executive Committee and the USAC Subcommittees to achieve overall USAC goals.

USAC Member Name	Staff Role	College/Unit
Steven Blalock, Chair	IA Scholars Program Manager	College of Arts & Sciences
Kate Blevins, Vice-Chair	IT Business Operations Manager	Med Ctr/IT Administration
Kynthia Droesch	Director, Academic Advising	College of Public Health
Jennifer Elliott	Sr Privacy Officer	Office of the CIO
Sherri Hall	Positions Control Manager	Health System Shared Services

STAFF SENATOR SELECTION AND APPOINTMENT
Background
In 2019, the Board of Trustees officially approved that five (5) voting staff members be added to University Senate to advocate for the needs and concerns of staff across the university. After approval, USAC was tasked to select the staff senators and formulate the call for applications, determine the criteria for a successful candidate, and manage the interview and selection process of candidates to the staff senator position. The University Senate is Ohio State's shared governance decision-making body to develop and implement policies that impact all students, faculty, and staff at the university and is comprised of nineteen (19) Senate Committees.

The Governance Subcommittee was responsible for developing the application, rubric and interview process of selecting the candidates. For the inaugural year, to endure continuity of business, a staff senator's appointment to the University Senate was set for either a one- or two-year term, with the option of one two-year term renewal. Staff Senators opting for a two-year renewal would have to go through the application process again.

In addition to the five (5) staff senators, the Governance Subcommittee was also tasked with selecting staff senator alternates to fill the role of a staff senator in case of their absence.

Key Accomplishments

Due to COVID-19, the Staff Senator interview and selection process was conducted entirely online as to adhere to university policies on social distancing while valuing the health and safety of staff. Applicants were required to submit a completed application containing answers to identified questions in essay format along with a copy of their resume. The Governance Subcommittee reviewed and assessed all applications by utilizing a rubric while ensuring that there was a diversity of applicants, units and job positions represented. The final slate of candidates was presented to USAC membership to approve to move forward to conducting virtual interviews using Zoom technology.

Applicants invited to the virtual interview process were, as in the previous year, given a standard amount of time to provide a platform statement on what they would bring to the role as a Staff Senator and to outline their priorities and objectives. Following the platform statement, applicants were asked a series of questions from USAC members and a virtual vote via Qualtrics was taken at the end of the interviews. Once the Staff Senators were confirmed for the year, the Governance Subcommittee solicited applications for Staff Senators to serve on Senate Committees to deepen their involvement within University Senate operations. More information on those committees can be found in the Senate and External Committee Appointments section below.
For the 2020-2021 academic year, the following staff senators are serving in the role:

Name	Title/College or Unit	Years of Term
Thomas Gessells	Director, Information Technology, OSU Health Plan	2019-2021
Lisa Mayhugh	Associate Director, Electroscience Lab, College of Engineering	2019-2021
Andrew Jordan	Manager, Strategy and Organizational Effectiveness, Office of Student Life – Recreational Sports	2020-2022
Courtney Sanders	Relationship Manager, Office of the Chief Information Officer	2020-2022
Alexander Thomas	Senior Academic Advisor, Department of Electrical and Computer Engineering, College of Engineering	2020-2022

The following staff members are serving in the staff senator alternate role for the 2020-2021 academic year:

Name	Title/College or Unit	Years of Term
Megan Hasting	Program Manager, Professional Development Programs, John Glenn College of Public Affairs	2020-2021
Wil Turner	Athletic Trainer, Ohio State Athletics	2020-2021

The Staff Senator Update for the USAC Annual Report which can be found in Appendix G which highlights areas of focus as well as next steps for 2020-21.

Appendix G: Staff Senator Update for USAC Annual Report 2020-21

STAFF CAREER DEVELOPMENT GRANTS (SCDG)
Key Accomplishments
USAC, in collaboration with the Office of Human Resources (OHR), has continued to have a positive impact on the professional development of staff even amid COVID-19. For the 2020-21 academic year, USAC and OHR maintained both autumn and spring staff career grant cycles. Staff at the university and medical center were able to apply for a variety of opportunities, including online webinars, workshops, conferences, funds for equipment, software and materials, and other activities that support various aspects of the enterprise. The below tiered system recognizes individual and group application proposals and was adopted in July 2018 (FY19) after receiving approval of a funding increase of $50,000 annually to support staff professional development:

SCDG	Before July 2018	Starting July 2018
Individual	Up to $1,000	Up to $1,250
Group	Up to $1,500	Group of 2-10: up to $1,750.- Group of 11+: up to $2,000.-

USAC and OHR continued to review and score grant applications using a new online system in which OHR implemented in FY20. The Governance Subcommittee continued to work with both USAC membership and OHR to support both reviewers and applicants. New for the 2020-21 academic year, the Governance Subcommittee partnered with OHR on Thursday, March 18, 2021 to offer a live webinar to provide an overview of the grant application process, clarity related to any confusion or issues regarding the application process, provide best practices and tips on strengthening applications and to offer an opportunity for attendees to ask questions regarding the process. This webinar was recorded with thirty (30) staff members attending and will be available as a resource for future grant cycles on OHR's Gateway to Learning website.

Through continuous commitment of promoting the SCDG from both OHR and USAC, the joint grant review team have observed many positive outcomes as a result of the above mentioned changes:
- During the fall grant cycle (September 2021), OHR received 150 applications for the grants, with 60 applicants awarded funds which totaled $59,285.09 in funds awarded.
- Since October 2013, 3,259 applications have been submitted, with 900 grants awarded, totaling $941,607.66 since the start of the grant program.

The tiered funding approach which began in July 2018 (FY19 grant season) has been an attractive offering for group applicants.
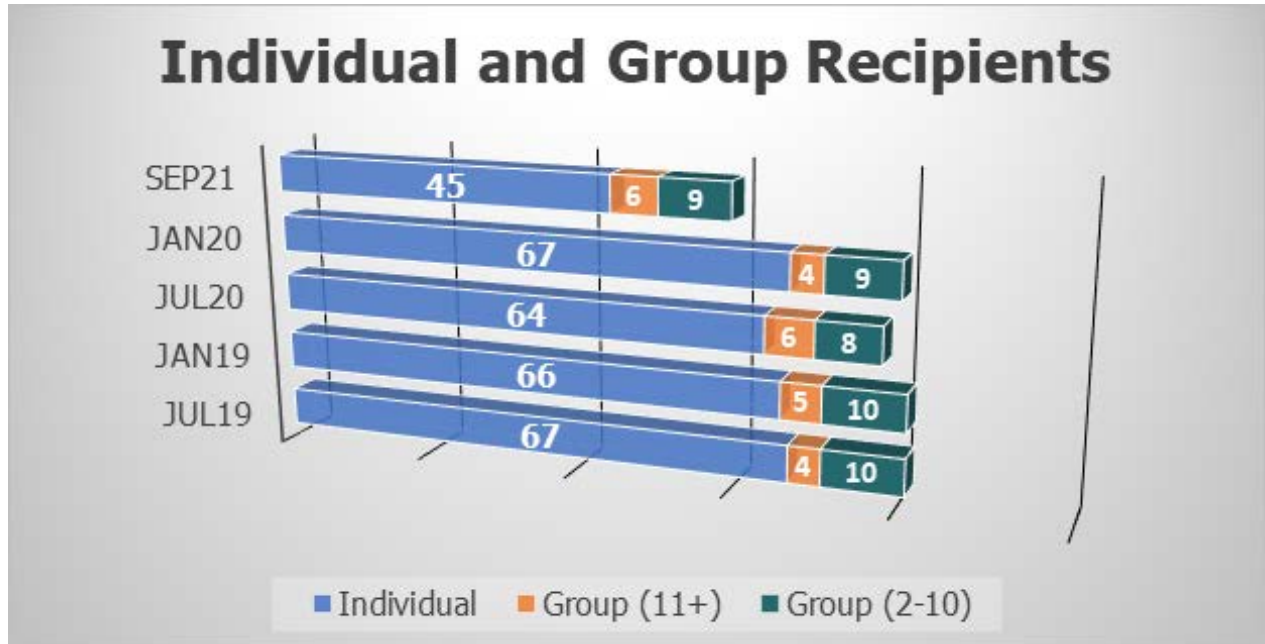
Below are some statistics regarding the SCDG since 2014.
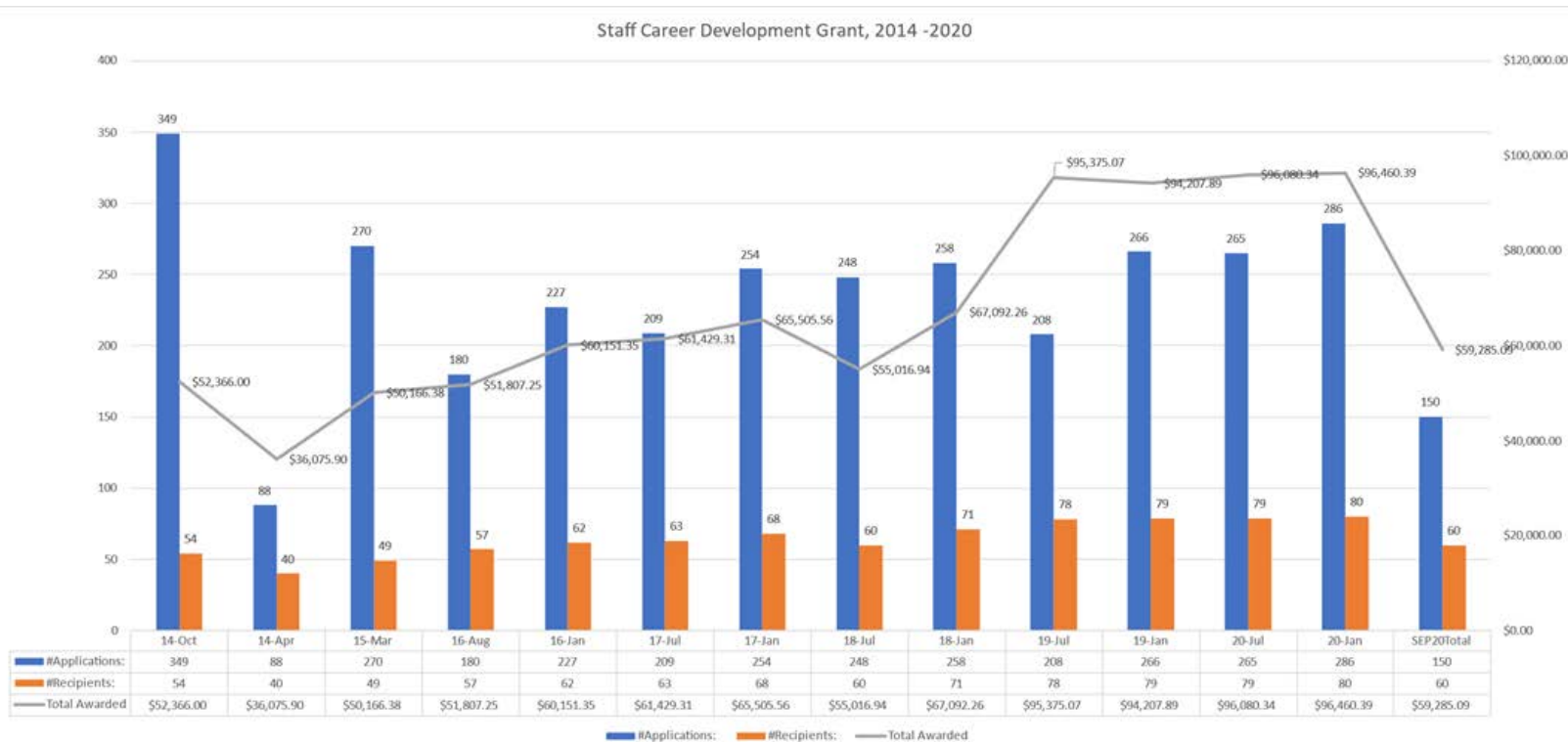
COVID-19 Impact

Due to the ongoing COVID-19 pandemic and the restrictions on travel and in-person gatherings, there has been a significant impact for the grant program and the recipients. During the January 2020 grant cycle, many grant recipients received extensions to use their funds and/or fund reallocations were granted. To date, over $6,500 has been forfeited due to the impact of COVID-19. For the September 2020 grant cycle, OHR received fewer applications, recipients, and funds awarded due to the absence of travel requests.

Below is a snapshot of data on the number of applicants, recipients, funds awarded, use of funds, and exceptions made due to COVID-19. Included is the July 2020 grant season as a reference for a typical non-COVID-19 grant cycle.

Grant Season (FY)	JUL20	JAN20	SEP21
# of Applicants	265	287	150
# of Recipients	79	80	60
Total Funds Awarded	$96,668.31	$96,460.39	$59,285.09
Use of Funds:			
Classes, books, continuing education	17%	14%	32%
Local/national seminar or conference	59%	64%	20%
Membership or Certification	18%	21%	42%
Other (expenses toward professional dev.)	6%	1%	7%
% of Recipients Requesting Funds for Travel	54%	65%	2%

COVID Impact as of February 1, 2021:	Non-COVID		
Extensions	4	16	2
Forfeits	6	6	2
No Change	69	17	5
Reallocations	0	10	0
Impact To Be Determined	0	31	51

Staff Manager Development Grants

The Staff Manager Development Grant Program supports staff in becoming better and more effective managers in their home units at the university. The grant program supports professional development activities up to $1,000 that are organized and sponsored by Ohio State that aligns with university values and initiatives. For FY20, fourteen (14) staff members received these funds. The below chart highlights statistics regarding the Staff Manager Development Grant since October 2014:

STAFF MANAGER DEVELOPMENT GRANT

■ #Applicants: ■ #Recipients:

Period	#Applicants	#Recipients
OCT14	109	40
SEP14	61	45
AUGM16	15	14
JANM16	11	8
FY17	15	15
FY18	23	20
FY19	13	13
FY20	14	14
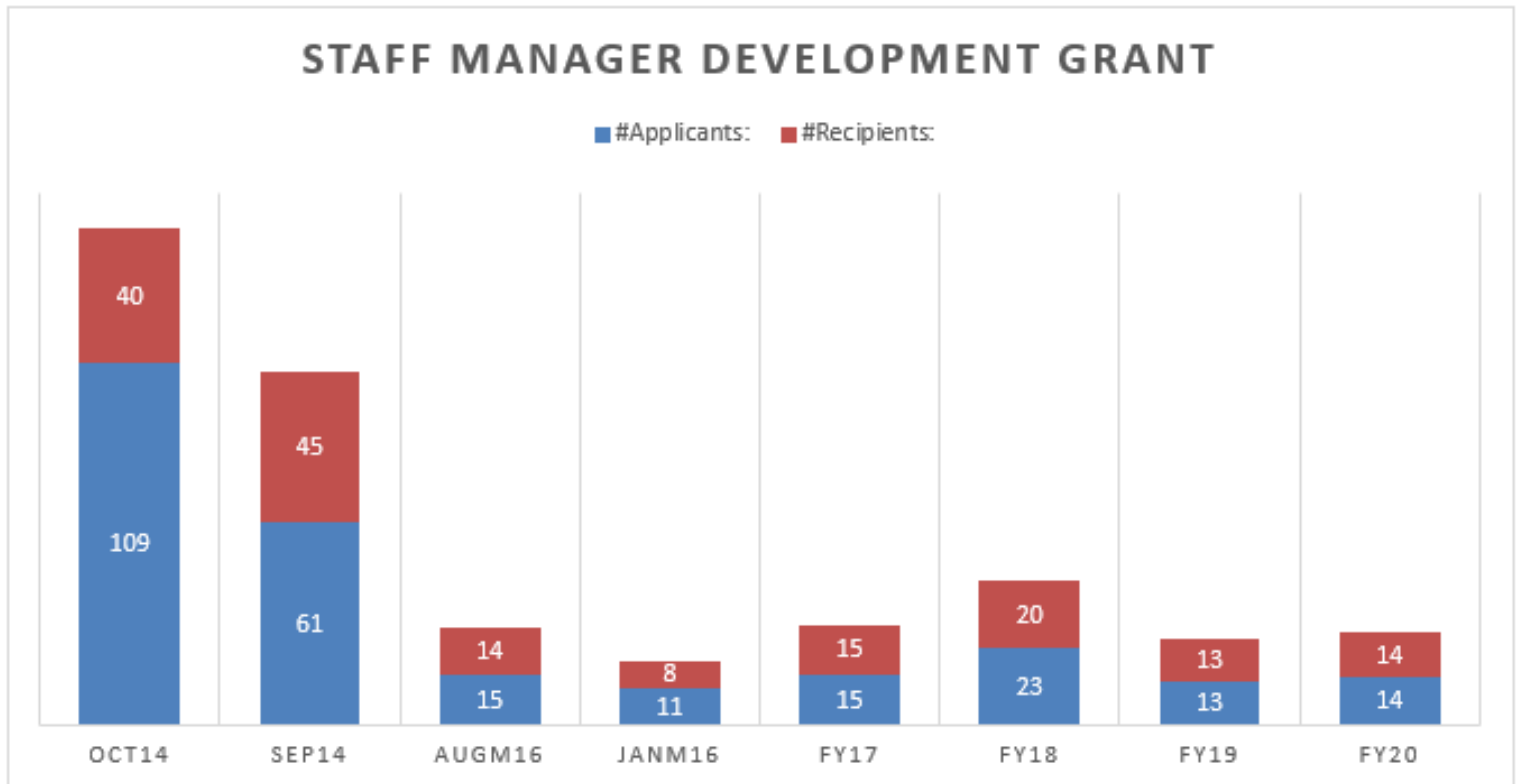
Coaching Services Program

Over the last several years, USAC and OHR have discussed ways in which to support staff professional development. For FY21, $100,000 has been allocated to a new Coaching Services Program to further support staff in their professional development and leadership skills. This virtual platform will allow selected staff up to six (6) coaching sessions to connect staff with coaches and gain access to leadership resources and tools that staff can utilize in their positions. The coaching sessions are valued at $1,250. Managers will work with their supervisors to identity an area or areas that the manager can build upon to achieve tangible results in their home unit.

Key Partners

Office of Human Resources

Next Steps

USAC and OHR will continue to partner and offer Staff Career Development Grants to the staff community. Due to COVID-19 and the transition to Workday, there was a delay in grant cycles. Because of this, special considerations continue to be provided to grant recipients impacted by COVID-19 with the likelihood that applicants are not able to complete their professional development opportunity. Flexibility and accommodations will continue to be a priority for both Governance and OHR to best support staff through their professional development at the university. Governance will also partner with OHR to update grant review materials, including the scoring rubric, training for USAC and OHR reviewers, and incorporating changes to the online application where possible.

USAC will continue working with OHR to increase awareness in units/colleges/extended campuses where Staff Career Development Grant (SCDG) application rates are traditionally low. Meanwhile, USAC will partner with OHR to roll out a Staff Coaching Service Program, a new initiative to revive the underutilized Staff Manager Development Grant (SDMG) by encouraging staff manager participation on this more customized and focused training program.

Appendix H: Staff Career Development Grant Analysis, 2020 Report Appendix I: Staff Development Grants FY2020/2021

USAC EXTERNAL COMMITTEE APPOINTMENTS

Key Accomplishments

For academic year 2020-21, six (6) current USAC members, seven (7) USAC alumni, two (2) staff senators and three (3) staff senator alumni* are appointed to eight (8) Senate and eight (8) University external subcommittees. Representatives actively engage in and contribute to discussions impacting staff, students, and faculty members in general. The below table is the current listing of external committee staff members.

External Committee Reach
In order to effectively advocate on behalf of staff, the work cannot be limited internally to USAC. USAC has the pleasure of appointing staff members to a variety of opportunities that span across the university which includes: University Senate committees, task forces, and committees related to large-scale University initiatives.

Current USAC appointees and 2020-2021 external committee highlights are reflected on pages 24-25.

Ohio Staff Council of Higher Education
Athletic Council
Senate Rules
Health Plan Oversight Committee
Ohio Union Council
Senate Steering
Council on Physical Environment
Senate Diversity Committee
Recreational Sports Committee
Senate Fiscal Committee
Public Safety Advisory Committee
Employee Emergency Fund
Council on Distance Education, Libraries & Information Technology
Council on Enrollment and Student Progress
Parking Advisory Committee
One University Health and Wellness Council

THE OHIO STATE UNIVERSITY

External Committee	External Committee Appointee	Senate / University	External Committee Chairperson
Athletic Council	Kevin Petrilla	Senate	Courtney Lynch
Council on Distance Education, Libraries, and Information Technology (DELIT)	Wil Turner	Senate	Nicole Kraft
Council on Enrollment and Student Progress (CESP)	Sarah Williams	Senate	Russell Marzette
Council on the Physical Environment (COPE)	Steve David	Senate	Jake Boswell Scott
Diversity Committee	Derek West and Katherine Betts	Senate	Schricker Russell Hassan
Employee Emergency Fund (EEF)	Steven Loborec (Chair-elect)	University	Sharon Saia
Fiscal Committee	Gerhard (Gerry) Raimann	Senate	Michele Basso
Health & Wellness Council	Chrissy Sprouse (Chair)	University	Bernadette Melnyk
Health Plan Oversight (HPO)	Katie Shockley	University	Randy Smith
Ohio Union Council (OUC)	Steven Blalock	University	Nathan Rush
Ohio Staff Council of Higher Education (OSCHE)	Annie Bingman	University	Michael Hicks
Parking Advisory Committee (PAC)	Steven Loborec (Chair-elect)	University	Beth Snoke
Public Safety Advisory Committee (PSAC)	Holly Davis	University	Monica Moll
Rules Committee	Lisa Mayhugh	Senate	Jared Gardner
Senate Steering	Chrissy Sprouse (Chair, voting) Steven Loborec (Chair-elect, non-voting)	Senate	Amy Darragh
University Recreational Sports Committee (URSC)	Emily Kelley	University	Derek Walton

*Members can be an alumni of both USAC and Staff Senator

During July 2020, USAC advocated for a USAC member to be added to the newly created Public Safety Advisory Committee (PSAC) which is within the Department of Public Safety.

PSAC's goal is enhancing the safety and well-being of all members of the university community while discussing topics such as continuous operational improvement initiatives, safety notices, community outreach and engagement, training opportunities, compliance with best practices and regulations, etc.

During academic year 2020-21, staff concerns were voiced and feedback given for various discussions that included, but are not limited to:

- Return and transition from remote work back to in-person work due to COVID-19
- How to support staff through COVID-19 as it relates to wellness, work-life balance, supporting staff with children
- Assessing what other colleges and universities are doing to cope with COVID-19 on their respective campuses to better understand how Ohio State is doing in that space
- Providing feedback for improving campus safety notices sent after crimes are committed on campus and strategies for improving campus and community relations with the Ohio State Department of Public Safety
- Issues relating to the university's strategy of improving and enhancing diversity, equity, and inclusion in various areas (athletics, interactions with campus police, efforts to hire and support staff of color)
- Ongoing discussions on the recent implementation of Workday, Shared Values Initiative, Career Roadmap, and other large-scale university initiatives currently taking place

A strategic goal of USAC is to engage with leadership across the University whose work aligns with USAC's mission. Engagement allows for USAC to stay well informed of the continued work that impacts the staff experience. It also provides the opportunity to be advocates on behalf of staff and represent staff perspectives during decision making processes.

Special Interest Group Involvement	
Group Name	**USAC Representative**
Academic Transition Task Force	Stacey Houser
Action Collaborative Working Group	Chrissy Sprouse
Benchmarking and Long-Term Policy Workgroup	Kate Blevins Stacey Houser
Benefits and Leave Workgroup	Chrissy Sprouse
Benefits Appeal Committee	Sherri Hall
Career Road Map Steering Committee	Chrissy Sprouse
Distinguished Staff Award Selection Committee	Laurel Van Dromme
Education for Citizenship	Chrissy Sprouse
Mitigating Rate Ad-Hoc Committee	Chrissy Sprouse
Orientation Revamp Committee for Medical Center and Campus	Kate Blevins
Shared Values Initiative Steering Committee	Chrissy Sprouse

Next Steps
For staff senators and external committee appointments, USAC will work closely with partners in the University Senate to ensure staff senators are involved in the Senate Committee's work and to increase general staff presence in the nineteen (19) Senate Committees. For University-wide committees, USAC is to set a mechanism to increase the engagement of USAC appointees.

Employee Emergency Fund (EEF)
Key Accomplishments
As part of the 2017-18 USAC Annual Report, USAC recommended obtaining one-time funding of $50,000 in order to aid in the fund sustainability to meet the needs of our employees during times of hardship. The grant maximum increased from $500 to $1,000 per granted application effective January 1, 2019 which was a part of the 2016-17 USAC Annual Report recommendation. Sharon Saia, Director of the Employee Assistance Program (EAP), worked with legal services in order to add housing instability or need for shelter as criteria to the EEF application. During FY20-21, forty-three (43) applications were granted which totaled $40,257 paid to applicants. The primary reasons granted were as follows:

Primary Reason	Number of Approvals	
	FY20	FY21*
Death	2	2
Domestic Violence	3	0
Fire/Disaster	4	2
Housing Instability	4	0
Medical/Health Problem	11	11
Other	2	2

*Reflect data from 7/1/20 to 12/31/20

Next Steps
Continue promoting the Employee Assistance Program (EAP) and the Employee Emergency Fund (EEF) to ensure staff are aware of and utilizing these programs as needed. Due to the increase of grant amount, addition of housing instability and impacts from COVID-19, the EEF balance as of March 2021 is $19,742. USAC would like to continue monitoring this change to be good stewards of the fund with the possibility of 1) decreasing the eligibility wait period from one (1) year to six (6) months of continuous service and 2) partnering with Business & Finance and the Office of Advancement to establish an endowment to support the sustainability of this program to fund these grants in the future.

Appendix J: EEF Applications Report Fiscal Year 2019-2020
Appendix K: EEF Applications Report Mid-Fiscal Year 2020-2021

The mission of the **Inclusive Excellence Subcommittee (IE)** is to promote inclusive excellence within USAC by integrating deliberate efforts and executing practices that support a more equitable and inclusive culture, and to establish partnerships across campus to promote equitable and inclusive initiatives that will enhance the staff experience.

USAC Member Name	Staff Role	College/Unit
Ferdinand Avila-Medina, Chair	Learning Specialist	Newark Campus
Annie Bingman, Vice-Chair	Interim Assistant Director	Student Life – Residence Life
Courtney Gandy	Admissions Counselor	Lima Campus
Danielle Jennings	HR Consultant	Office of Human Resources
Brittany Savko	Sr Program Coordinator	Office of Student Academic Success
Patrick Weeks	Assoc. Med Center Buyer	Wexner Medical Center

On June 10, 2020, in response to the tragic deaths of George Floyd, Ahmaud Arbery, Breonna Taylor and many other black and brown people as a result of institutional racism, The Ohio State University's 15th President, Michael V. Drake, announced the creation of the Task Force on Racism and Racial Inequities, which is co-chaired by James L. Moore, III, Vice Provost for Diversity and Inclusion and Chief Diversity Officer and Tom Gregoire, Dean of the College of Social Work. While the task force continues to make progress towards their final report and recommendations, USAC's Inclusive Excellence Subcommittee has been actively engaged in initiatives consistent with the main charge of the task force, in particular:

- Hosting inclusive, candid conversations that actively engage our community on the topic of racism and racial inequities at our university
- Identify institutional processes, policies, practices, programs and positions that contribute to inequities and differential outcomes for specific racial groups at our university
- Identify current practices that contribute to eliminating racism and racial inequities at Ohio State

Partnerships
IE strengthened the relationships with university partners to align USAC's mission and goals with those of other university stakeholders. At the beginning of the academic year, meetings occurred with Russell Hassan, Chair of the University Senate Diversity Committee to discuss common areas of interest and advocacy, which included the impact of COVID-19 among faculty and staff, particularly in racially minoritized populations; 2020 Presidential election and prospects of violence on campus, as well as policy changes across the university such as the creation of the Furlough Policy. Also, IE has actively partnered and advocated for inclusive excellence practices with various Staff Advisory Committees (SACs), Employee Resource Groups (ERGs) and more specifically the Diversity Leaders Council under the Office of Diversity and Inclusion.

Partnerships are not limited to external constituents to USAC. IE is also collaborating with other USAC subcommittees and taskforces to promote a more inclusive and diverse environment. For example, this year, IE completed a 5-year review of USAC's membership applications to assess areas of improvement in membership recruitment. The analysis, which highlighted applicant years of service, appointment type, campus, and college/unit represented, will help USAC understand the backgrounds of applicants and inform recruitment strategies for the upcoming year to ensure diversity and representation amongst the staff population at Ohio State.

Appendix L: Historical USAC Application Review 2015-2020

Equity Talk, Equity Walk
On December 9, 2020 and January 27, 2021, USAC invited Dr. Jacquelyn Meshelemiah, Associate Vice Provost within the Office of Diversity and Inclusion to a business meeting to host a discussion within USAC to provide first-generation equity practitioners tools and resources needed to engage in transformational change. Amongst other areas, USAC gained insightful knowledge on how to align strategic priorities with Diversity, Equity and Inclusion (DEI) initiatives and how to develop data-driven strategic planning that results in meaningful diversity action plans. Through the *Equity Talk, Equity Walk* conversation, IE was able to embed within USAC the concept of equity-mindedness: the mode of thinking in which practitioners assess their own radicalized assumptions, acknowledge their lack of knowledge in the history of race and racism, and take responsibility for the success of historically underserved and minoritized groups.

Employee Resource Group (ERG) Initiative
Background
In the Winter of 2019-20, in coordination with the Office of Human Resources (OHR), IE conducted a survey to learn more about Employee Resource Groups (ERGs) at Ohio State. The objective was to develop a better understanding of ERGs existing across the university, including their membership size, funding models, events/programming, and resources to promote consistency and partnerships between diverse constituents. From this survey, twelve (12) ERGs were identified from a total of twenty-one (21) responses. IE subcommittee members then held follow-up phone conversations with identified ERG leaders to learn more about each group.

Appendix M: ERG Conversation Survey Results

Key Accomplishments
During 2020-21, IE hosted the first **ERG Summit** bringing together employee resource, networking, and affinity group leaders across Ohio State (including all academic campuses and the Wexner Medical Center) on October 8, 2020. Hosted in partnership with Nina Brooks, Diversity and Inclusion Consultant in the Office of Human Resources (OHR), this one-hour session focused on getting to know fellow leaders of ERGs, networking, and affinity groups, while sharing best practices and discussing the staff experience.

After a successful first meeting, it was determined USAC would host bi-monthly gatherings for continued networking and dialogue amongst peers. Meetings were held in December, February, and April with conversations that stemmed a variety of topics, including but not limited to, group establishment and history, successes and challenges, programming, group leadership and structure, sponsorship/leadership support, and meeting cadence. Another topic discussed is the value of ERGs to the organization – from involvement in policy review and creation to leveraging ERGs in the talent space (recruiting, hiring, retention); ERGs can be a strategic resource to the enterprise.

Next Steps
Several discussions during the bi-monthly gathering events have led to next step initiatives. A retreat was proposed and will take place during Summer 2021, introducing ERG leaders in-person continuing conversations and potentially hearing from executive leaders and OHR, as well as developing a collective long-term agenda. Additionally, IE continues to partner with Nina Brooks to create and publish general guidance documentation for the creation and management of new ERGs. Peers recently provided helpful information to an ERG leader whose organization is newly established and growing, and a resource sheet may be beneficial resource to future staff who wish to form such a group. IE is planning to propose this guidance documentation, as well as a list of existing ERGs, be added to the USAC website.

Pride and Ownership Conversations
There are multiple conversations and initiatives on racism, equity and social justice happening at The Ohio State University. However, not all conversations target the particular realities of staff. To address this need, IE proposed and is developing a new series of conversations called **Pride and Ownership DEI conversations**. The Pride and Ownership conversations are recorded, short and informal dialogues with college deans and academic leaders intended to expand the understanding of the many DEI efforts happening across the university and their impact on staff. These short conversations will be hosted via USAC's website accompanied by relevant statistics and documentation. The main objective of this project is to highlight DEI efforts with their challenges and successes while helping Ohio State achieve a strong and sustainable diverse, equitable and inclusive workplace. It should also serve as a catalyst for further and deeper discussions within the colleges and the Buckeye community at-large.

The mission of the **Outreach & Engagement Subcommittee (O&E)** is to coordinate USAC engagement with staff and senior leadership to fulfill USAC's mission to maintain an active and participatory line of communication and to build a sense of community among staff.

USAC Member Name	Staff Role	College/Unit
Lauren Gannon Evans, Chair	Relationship Manager	Office of the CIO
Randall McKenzie, Vice-Chair	Interim Human Resources Business Partner	University Libraries
Elizabeth Hosket	Business Manager	Health System Shared Svcs
Emily Kelley	Assoc Director, Prospect Develop.	Office of Advancement
Drew Miller	Sr Business Operations Analyst	Clinical Engineering
Debbie Pond	FAME Program Manager	College of Medicine
Katie Watkins	Program Director, UGrad Studies	College of Pharmacy

Thirty (30) members on USAC hold 290 years of collective University service demonstrating dedicated and accumulated knowledge to provide the best experience for staff, faculty, students and other constituents on a daily basis. Throughout FY21, the strategic goal of the Outreach and Engagement Subcommittee was to create meaningful and authentic virtual engagement opportunities for staff that complies with standards and best practices as maintained by the University in regards to COVID-19. This shift in engagement was the focus of the subcommittee's work, knowing that the way USAC typically hosted events and connected with staff would not be feasible this year.

Additionally, USAC recognized the importance of facilitating a culture of availability and transparency, especially during this unprecedented time, coupled with the transformation occurring within the University during this time of organizational, procedural, budgetary and leadership change. The outreach highlighted below details the work carried out by O&E to maintain USAC's support of staff and the great work being conducted on behalf of the University, while also providing an avenue for updates and conversations with USAC and a place for dialogue and discussion with University leaders.

Staff and Faculty Appreciation Week
In collaboration with the Office of Human Resources (OHR), USAC supported **Staff and Faculty Appreciation Week**, July 27-31, 2020. USAC members contacted over seventy (70) local businesses, near the University District, to partner in offering promotions to university staff and faculty.

Stuff the Backpack Event in support of Columbus City Schools and NBC4
During the month of August, USAC hosted the annual **Stuff the Backpack** school supply drive in conjunction with NBC4 city-wide drive. This year, USAC promoted **Stuff the Backpack** as a virtual school supply drive to the university community. Information on how to donate was shared in the USAC monthly newsletter, USAC social media channels, and OnCampus Today. Every $10 donation provided a backpack of essential supplies to one (1) student.

Conversation with Leadership Series

On Thursday, October 29, 2020, the **Conversation with HR Leadership** was held virtually via Zoom and included the following panelist:

- Susan Basso, Former Senior Vice President of Talent, Culture and Human Resources
- Alison Mincey, Senior Associate Vice President Human Resources, Wexner Medical Center
- Lin Hillis, Associate Vice President, Talent, Leadership and Diversity
- Kim Shumate, Associate Vice President, Strategic Initiatives

Topics covered included several university-wide initiatives of staff concern, including: Career Roadmap, Workday implementation; HR Service Delivery, and support of flexible/ remote work. There were 461 registrants and 393 attendees.

USAC hosted a new Conversation with Leadership programming in 2020, the **Diversity and Inclusion Conversation** which was held virtually via Zoom on Tuesday, November 17, 2020. The conversation was facilitated and moderated by James L. Moore, III, Vice Provost for Diversity and Inclusion and Chief Diversity Officer and included the following panelist:

- Bruce McPheron, Executive Vice President and Provost
- Harold L. Paz, Executive Vice President and Chancellor for Health Affairs
- Tom Gregoire, Dean of the College of Social Work
- Susan Basso, Former Senior Vice President of Talent, Culture and Human Resources
- Autumn Glover, Government Affairs and Community Relations Consultant

This is the first time USAC hosted this array of leadership on a panel discussion in front of staff. The conversation focused on diversity, equity, and inclusion topics of interest for staff, and how staff can have impact in these important areas. USAC received positive feedback and requests for continued discussion from leadership and staff as diversity and inclusion is an ongoing topic. There were 294 registrants and 207 attendees. A follow-up **Diversity and Inclusion Conversation** hosted again by Dr. James L. Moore, III is scheduled for Tuesday, June 8, 2021, and will feature staff on the panel discussion. Moving forward, USAC's goal is to host a Conversation event around Diversity and Inclusion twice a year.

On Wednesday, March 10, 2021, USAC hosted the **Conversation with the President** virtually via Zoom. This was the first opportunity for staff to engage with The Ohio State University's 16th President, Kristina M. Johnson, PhD. The purpose of this event was to provide an opportunity for staff to hear directly from President Johnson on her mission, vision and focus for the University.

> **Kristina M. Johnson** ...
> @PresKMJohnson
>
> Enjoyed attending @USAC_OSU town hall to hear from our outstanding @OhioState staff about important topics of interest. Thank you to everyone who participated, and I look forward to working together to advance our mutual goals for the university.
>
> 1:50 PM · Mar 10, 2021 · Twitter for Android
>
> **1** Retweet **40** Likes

Topics of interest to staff were gathered prior to the conversation and included: plans on returning to campus for staff, financial updates including the Annual Merit Compensation Process (AMCP) and the role of staff at the University and within the State of the University Address. There were 480 registrants and 446 attending.

USAC Wellness Series Programming

In an effort to support the staff community, USAC partnered with various constituents across the University such as the Employee Assistance Program (EAP), Ohio State Health Plan and Your Plan for Health (YP4H) on various topics of interest to staff to provide assistance in an environment where times are challenging. Webinars and topics included:

- In partnership with the EAP, **Parenting in the Time of COVID** was offered on Friday, September 18, 2020. There were 96 registrants and 57 attendees.
- In partnership with the Ohio State Health Plan and Your Plan for Health, **Is Health Coaching for Me?** was offered on Thursday, October 8, 2020. There were 36 registrants and 32 attendees.
- In partnership with the EAP, **Preventing Burnout** was offered on Thursday, November 12, 2020. There were 137 registrants and 87 attendees.
- In December 2020, USAC created a self-guided resource for **Surviving the Anxieties Related to COVID**. The resource provided health and wellness tools, and debunks common myths related to COVID-19.

Throughout 2021, USAC continued to promote Wellness events offered through campus partners such as Your Plan for Health, EAP, and Buckeye Wellness which include:

- *Movement and Mindfulness Mondays*. No registration is required, and all sessions are hosted live on Buckeye Wellness Facebook and Twitter.
- Webinars from the EAP including: *Mental Health Awareness for Managers* and *Parenting in the time of COVID* in February, and *Stress Management and Self-care* in March.

2020 - 2021 Staff Engagement Total: 1466
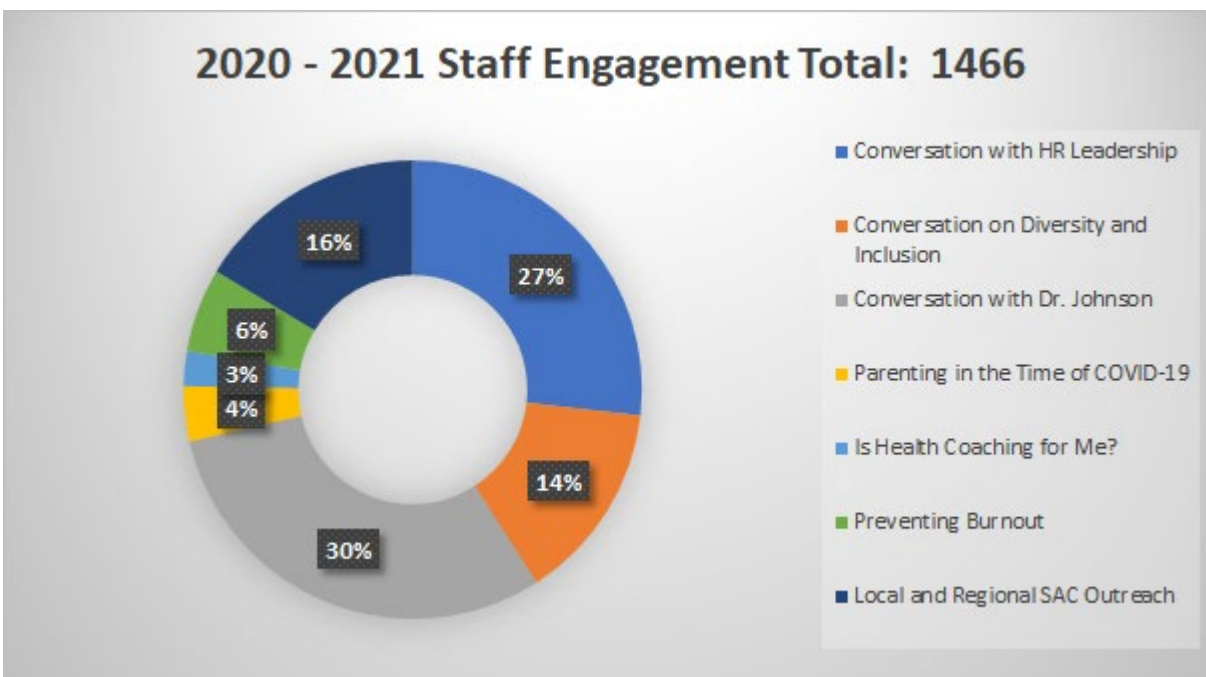
Ohio State Kindness Campaign Collaboration

In Spring 2021, members of the O&E subcommittee began conversations with Tracy Stuck, Program Director, and Kristin Smith, Relationship Manager, both within the Office of Student Life. With the support of a grant through the Columbus Foundation, Tracy and Kristin are responsible for the coordination of Kindness initiatives on campus. The initial meeting entailed learning more about the Kindness Committee and engagement within the campus community in addition to brainstorming ways in which these initiatives could specifically benefit staff.

Next Steps

Although, currently, in the initial stage of forming this partnership, ideas that have surfaced include:

- USAC members serving as judges for the #BeKind Instagram wall contest
- USAC and staff participation in community service projects
- Promoting and participating in sending Kindness emails
- Creation of a pop-up Kindness table that will provide staff with the opportunity to be kind to themselves and take a break with mental health/relaxation

Through this new partnership, USAC was able to distribute Be Kind masks to USAC members and Staff Senators to not only keep everyone safe during COVID-19 but serve as a friendly reminder to always act with kindness towards others. USAC is looking forward to the continued partnership with the Kindness team in order to incorporate the staff community into this important initiative.

Local and Regional Staff Engagement

As in prior years, USAC continued focused engagement with local and regional Staff Advisory Committees (SACs), with presentations to seventeen (17) staff advisory groups over both autumn and spring semesters:

Staff Advisory Committees

Blackwell Leadership Team	College of Optometry	OSU Mansfield
College of Arts and Sciences	College of Veterinary Medicine	OSU Marion
College of Dentistry	Department of Physics	OSU Newark/COTC
College of Engineering	Fisher College of Business	OSU Wooster
College of Law	Med Center IT	University Libraries
College of Nursing	OSU Lima	

During the autumn semester engagements, USAC shared the mission and structure of the committee, as well as strategic goals and university-wide initiatives for the year. Topics of staff interest and questions raised by SAC members included:

- Winter Recess implementation
- Supporting staff in flexible/remote work post-COVID
- Career Roadmap updates

In spring semester, USAC provided information on:

- Distinguished Staff Awards, Staff Career Development Grants and various Wellness Programs
- USAC hosted initiatives such as the USAC Staff in the Spotlight, Annual SAC Retreat, and the Conversation with Leadership Series with President Kristina M. Johnson
- Recruitment opportunities for University Staff Senators and USAC membership

The relationships formed with the SACs also allows USAC to get a pulse of staff concerns, morale, and ideas within each unit. This also provides an insight to ensure USAC's initiatives for the year are in alignment to enhance the staff experience.

While meeting with leadership throughout the course of the year, USAC continuously discusses morale, culture and needs of staff. Many leaders in units without a SAC have started having discussions around the creation of a formal body of staff to help support and advocate for staff within their perspective units. Conversations with Gene Smith, Senior Vice President and Wolfe Foundation Endowed Athletics Director have led to the creation of the Department of Athletics SAC. USAC is honored to be a part of these conversations with leaders and the value staff add to the culture within each unit.

Wellness Task Force

USAC Chair, Chrissy Sprouse, appointed the Wellness Task Force in October 2020, in response to a request by Dr. Bernadette Melnyk, Chief Wellness Officer and Dean of the College of Nursing. Dean Melnyk asked that USAC help identify and break down barriers that prevent staff from engaging with wellness programming, and to support staff in their continued wellness journey. The task force was charged with creating a Wellness Toolkit that would equip staff with resources to promote wellness engagement at work. The task force was also asked to recommend a way to permanently incorporate wellness within the existing USAC structure.

USAC Member Name	Staff Role	College/Unit
Randall McKenzie, Chair	HR Consultant	University Libraries
Brittany Crall	Business Manager 2	Office of Student Life
Emily Kelley	Assoc Director, Prospect Develop.	Office of Advancement
Debbie Pond	FAME Program Manager	College of Medicine

Wellness Toolkit

Key Accomplishments

In creating the Wellness Toolkit, the task force collaborated with various constituents across the university and Medical Center which included:

Name	Title	Department/Unit
MJ Abell	Talent Management Sr. Analyst	Office of Human Resources
Kym Adkins	Talent Management Sr. Analyst	Office of Human Resources
Lauren Battista	Wellness Program Manager	College of Nursing
Stefanie Morrow	Director of Wellness and Coaching	OSU Health Plan
Carolyne Starling	Program Coordinator	OSU Health Plan
Melissa Walters	Wellness Benefits Consultant	Office of Human Resources

While work is ongoing, the task force has drafted a three-part Wellness Toolkit that includes resources for staff, resources for managers and leaders, and a testimonial video. The **Guide for Investing in Your Well-being** provides tips for staff advocating for flexibility to better engage with wellness programming. The intent is to equip staff for conversations with their manager about incorporating wellness into their workday. Also provided are sample activities for physical, mental, and career/intellectual wellness, and a list of campus wellness resources in one place. A downloadable wellness poster will be available with tips for staff engagement in regards to wellness at work.

The **Supporting Employee Well-being** guide is geared toward managers and leaders and provides links to articles that demonstrate the value of supporting employee wellness, suggests ways to support employees on their wellness journey, and provides ideas for incorporating wellness into a team environment. The guide also specifically references supporting employee mental health. To supplement the employee and manager resources, the task force is working to create a short testimonial video. Featuring managers and staff from across campus, the video will highlight how managers have successfully supported staff wellness and the return on investment in supporting their wellness journey.

In collaboration with the Buckeye Wellness team, the Wellness Toolkit will be hosted on the Health and Wellness website. This is the university's central website for health and wellness. Hosting the resources on this site would make them easily accessible to all employees at Ohio State, and allow them to be continually updated by the Buckeye Wellness team in partnership with USAC. The USAC website would also link to the toolkit website. The resources would be utilized for leadership training sessions that are facilitated by Buckeye Wellness. The Change Management and Communications working group within the Office of Human Resources' Campus Reactivation Task Force have also expressed interest in incorporating the Wellness Toolkit resources in return to campus communication materials.

Wellness within USAC Structure
The Wellness Task Force recommended adding wellness into the USAC bylaws and integrating wellness into the strategic goals
of each subcommittee. This approach would ensure wellness is permanently incorporated into the USAC structure and gives equal ownership to all members of the committee. In this model the power of USAC's advocacy is greatly increased because there would be focus on aspects of wellness that would be lost if limited to only one subcommittee. Suggestions for each subcommittee include:

> *Governance:* Examining and revising the USAC bylaws and governing documents to include a focus on wellness and encouraging wellness practices such as standing or movement in meetings. The committee would also be responsible for holding USAC accountable to wellness standards.
> *Staff Affairs:* Advocating for policy changes that impact staff wellness. This could include the permanent addition of mental health or wellness days in the sick leave usage policy, or changes to the vacation policy that would include a cash-out option for staff facing a hardship.
> *Inclusive Excellence:* Reviewing current wellness programming across campus for equity and diversity. The committee would make recommendations to improve access to wellness and the inclusion of diversity-focused wellness programming.
> *Outreach and Engagement:* Promoting university wellness programming using USAC's communication channels. The committee would partner with talent management to maintain, update, and expand the wellness toolkit.

President's Cabinet

President
Kristina M. Johnson
Engagement
Quarterly
Top Discussion Points
OSU Strategic Plan, USAC Overview/Initiatives, COVID-19 Impacts, University Climate, Staff Concerns

Executive Vice President and Provost
Bruce McPheron
Engagement
Quarterly
Top Discussion Points
OSU Strategic Plan, COVID-19 Impacts, Shared Governance, University Climate, Staff Concerns

Senior Advisor to the President; Interim Senior Vice President for Talent, Culture and Human Resources
Paul Patton
Engagement
Quarterly
Top Discussion Points
USAC Overview/Initiatives, COVID-19 Impacts, University Climate, Staff Concerns

Senior VP & CFO
Mike Papadakis
Engagement
Semi-Annually
Top Discussion Points
COVID-19 Impacts, Career Roadmap, University Climate, Staff Concerns

Senior Vice President, Administration & Planning
Jay Kasey
Engagement
Quarterly
Top Discussion Points
CTPP3, Capital Projects, Task Force on Community Safety and Well-Being, University Climate, Staff Concerns

Executive Vice President and Chancellor for Health Affairs, Chief Executive Officer, Wexner Medical Center
Harold L. Paz
Engagement
Annually
Top Discussion Points
Medical Center Priorities, Parking

Senior Vice President for Advancement
Michael C. Eicher
Engagement
Annually
Top Discussion Points
USAC Overview/Initiatives, Advancement Initiatives, COVID-19 Impacts, University Climate, Staff Concerns

Vice President for Government Affairs
Stacy Rastauskas Bretherton
Engagement
Annually
Top Discussion Points
Election and Government Affairs Impacts to Staff, University Climate, Staff Concerns
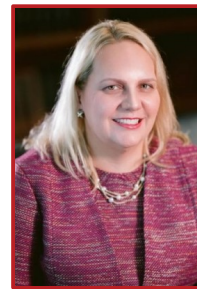
Senior Vice President and General Counsel
Anne Garcia
Engagement
Annually
Top Discussion Points
USAC Business Operations
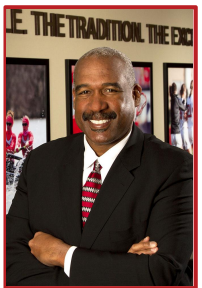
Senior Vice President and Wolfe Foundation Endowed Athletics Director
Gene Smith
Engagement
Annually
Top Discussion Points
Athletics Staff Engagement, COVID-19 Impacts, University Climate, Staff Concerns

Chief of Staff, Office of the President
JR Blackburn
Engagement
Continuous
Top Discussion Points
USAC Overview/Initiatives, COVID-19 Impacts, University Climate, Staff Concerns

Deputy Chief of Staff, Office of the President
Sarah Bohman
Engagement
Continuous
Top Discussion Points
USAC Overview/Initiatives, COVID-19 Impacts, University Climate, Staff Concerns

University Leadership

Chief Wellness Officer
Bernadette Melnyk
Engagement
Semi-Annually
Top Discussion Points
Health & Wellness,
University
Climate, Staff Concerns

Vice Provost and Chief Diversity Officer
James L. Moore, III
Engagement
Quarterly
Top Discussion Points
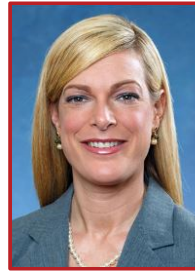Diversity and Inclusion, Task Force on Racism & Racial Inequities, University Climate, Staff Concerns

Senior Associate Vice President Human Resources, Wexner Medical Center
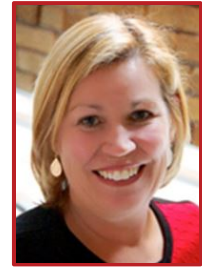Alison Mincey
Engagement
Quarterly
Top Discussion Points
HR Transformation, Employee Resource Center, University Climate, Staff Concerns

Associate Vice President Talent, Diversity and Leadership
Lin Hillis
Engagement
Monthly
Top Discussion Points
Talent, Diversity and Leadership Initiatives, Staff Leadership Forum, Staff Professional Development University Climate, Staff Concerns

Dean and Director of Ohio State Marion and Executive Dean of the Regional Campus Cluster
Greg Rose
Engagement
Annually
Top Discussion Points
Extended Campus Engagement, University Climate, Staff Concerns

Senior Vice Provost
Kay Wolf
Engagement
Annually
Top Discussion Points
Shared Governance, Dean's Review Reappointment

Assistant Vice President for Administration and Planning
Amy Burgess
Engagement
Quarterly
Top Discussion Points
CTPP3, Capital Projects, Task Force on Community Safety and Well-Being, University Climate, Staff Concerns

Senior Associate Vice President HR, Chief of Staff
Angie Trunzo
Engagement
Continuous
Top Discussion Points
USAC Overview/Initiatives, COVID-19 Impacts, University Climate, Staff Concerns

Executive Director, Wexner Center for the Arts
Johanna Burton
Engagement
Annually
Top Discussion Points
USAC Overview/Initiatives, Wexner Center for the Arts Engagement

Director of Education and Engagement and Interim Title IX Coordinator
Molly Pierano
Engagement
Bi-Annually
Top Discussion Points
Office of Institutional Equity Initiatives, Affirmative Action, Title IX, Equity, Staff Concerns

Fmr. Senior Vice President Talent, Culture & Human Resources
Susan Basso
Engagement
Monthly
Top Discussion Points
HR Strategic Plan, HR Transformation, Career Roadmap, Gender Pay Equity

Fmr. Associate Vice President for the Office of Institutional Equity
Kathy Lasher
Engagement
Annually
Top Discussion Points
Affirmative Action, Title IX, Staff Concerns

President and Provost's Council on Women (PPCW)

Kristen Cole
Chair

Bella Mehta
Former Chair

Engagement
Continuous

Top Discussion Points
Flex Work Policy, Staff Experience, Gender Pay Equity

Faculty Leadership

Ben Givens
Senate Secretary

Susan Cole
Faculty Council Chair

Amy Darragh
Steering Committee Chair
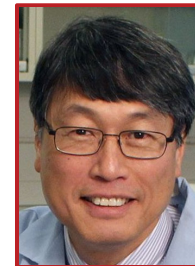
Ken Lee
Faculty Council Chair-Elect

Engagement
Continuous

Top Discussion Points
University Senate and Shared Governance

Shared Values

Gates Garrity-Rokous
Vice President and Chief Compliance Officer for the Office of University Compliance and Integrity

Kim Potter
Director of Policy and Engagement

Engagement
Continuous

Top Discussion Points
Shared Values Initiative

Enterprise Project

Tracey Pawlowski
Associate Product Manager/Owner - HR

Janis Wolens
Marketing/Communications Program Manager

Engagement
Continuous

Top Discussion Points
Workday Implementation, Change Management

HR Transformation

Rob Prisbrey
Compensation Principal Consultant

Engagement
Continuous

Top Discussion Points
Career Roadmap Planning and Progress, Staff Experience

OHR Learning and Development

Erica Banta
Associate Director, Talent Management

Nina Brooks
Diversity & Inclusion Consultant

Engagement
Continuous

Top Discussion Points
Staff Career Development Grants, Staff Experience, Implicit Bias

Name	Title	Unit
Executive Committee		
Chrissy Sprouse, Chair	HR Consultant	Office of Human Resources/Academic Affairs
Steven Loborec, Chair Elect	Assistant Director, Pharmacy	Wexner Medical Center
Laurel Van Dromme, Vice-Chair Secretary/Treasurer	Chief of Partnerships/Projects	College of Nursing
Shea Ryan, Vice-Chair Communications	Coord – Recreational Sports	Student Life – Rec Sports
Governance Subcommittee		
Steven Blalock, Chair	IA Scholars Planning Specialist	College of Arts & Sciences
Kate Blevins, Vice-Chair	IT Business Operations Manager	Med Ctr/IT Administration
Kynthia Droesch	Director, Academic Advising	College of Public Health
Jennifer Elliott	Sr Privacy Officer	Office of the CIO
Sherri Hall	Positions Control Manager	Health System Shared Services
Inclusive Excellence Subcommittee		
Ferdinand Avila-Medina, Chair	Learning Specialist	Newark Campus
Annie Bingman, Vice-Chair	Interim Assistant Director	Student Life – Residence Life
Courtney Gandy	Admissions Counselor	Lima Campus
Danielle Jennings	HR Consultant	Office of Human Resources
Brittany Savko	Sr Program Coordinator	Office of Student Academic Success
Patrick Weeks	Associate Med Center Buyer	Wexner Medical Center
Outreach & Engagement Subcommittee		
Lauren Gannon Evans, Chair	Relationship Manager	Office of the CIO
Randall McKenzie, Vice-Chair	HR Consultant	University Libraries
Elizabeth Hosket	Office Manager	Health System Shared Services
Emily Kelley	Assoc Director, Prospect Develop.	Office of Advancement
Drew Miller	Sr Business Operations Analyst	Clinical Engineering
Debbie Pond	FAME Program Manager	College of Medicine
Katie Watkins	Program Director, UGrad Studies	College of Pharmacy
Staff Affairs Subcommittee		
Sandy Otis, Chair	Asset Business Analyst	Business & Finance
Stacey Houser, Vice-Chair	Sr Assoc Dir, Risk Mgmt & Ins	Business & Finance
Tina Bogac	Senior Director, EHS	Administration & Planning
Brittany Crall	Business Manager 2	Office of Student Life
Holly Davis	Research Commons Services Coord	University Libraries
Jacob Hollar	Associate Editor, Strategic Communications	Office of Student Academic Success
Faith Kline	Administrative Director	Comprehensive Cancer Ctr
Justin Lahmers	Quality Improvement Specialist	Office of Research
Brandon Gibbs, Ex-Officio	Employee & Labor Relations Consultant	Office of Human Resources

UNIVERSITY STAFF ADVISORY COMMITTEE DECISIONAL REPORT TO PRESIDENT'S CABINET

April 9, 2020

Proposed Cabinet Decision:
A closure of the academic core at The Ohio State University ("OSU") beginning on December 24th and running through January 2nd allowing employees to have an extended period of time off at a time when classes are not in session and the general level of activity on campus slows. The proposed name for the closure is "Winter Recess."

Summary:
Working during Winter Recess will not be required, unless a staff member is deemed to be essential and the manager has determined that the employee is required to work during the Winter Recess. The Winter Recess would be considered a University Holiday and give staff paid time off during these days. Staff do not use accrued leave benefits during Winter Recess, nor do they accrue additional vacation hours during this time. Essential staff who are required to work during the Winter Recess will be allowed to take the equivalent number of approved days off prior to June 30th of the next year. For the Medical Center, Winter Recess days would be treated in the same manner as current University Holiday days for staffing resources and expectations.

Rationale:
Winter Recess is part of OSU's ongoing efforts to fulfill the strategic plan set forth by the five pillars of focus, with a specific emphasis on "Operational Excellence and Resource Stewardship." Pillar V states that "Ohio State will be an exemplar of best practices in resource stewardship, operational effectiveness, and efficiency and innovation." By closing non-essential functions during this time period, OSU will improve resource stewardship, operational effectiveness and efficiency by:

1. Improving staff morale
   - Provides employee downtime and time to re-charge during a hectic time of year.
   - Time to take off and spend with family without utilizing vacation days.
   - Demonstrates appreciation for staff and the impact their work has on the university community.

2. Improving recruiting and retention efforts
   - It is a common practice in the private sector and at peer institutions in the Big 10 to shut down non-essential functions during this timeframe. In the private sector, a few examples of companies providing shutdown periods during the holiday season include Boeing, Amgen, Inc., Adobe, LinkedIn, PwC, and Cisco. In the Big-10 eight out of ten universities surveyed stated a shutdown period during the holiday season is a standard practice.
   - This is a family friendly policy supporting parents who have children off of school during this time. In the past year over 6,700 employees left the University and roughly 25% of employees leave the University within the first year of employment. The Winter Recess would provide an extended period of time off for employees who have not yet accrued a large amount of vacation time.
   - Starting salaries and yearly performance raises are typically lower at a university than in the private sector, so this policy can be used to help attract potential high performing employees and then retain them once integrated into our culture.

3. Demonstrating an increase in energy cost savings
    - Closing university buildings will reduce energy consumption and reduce our overall carbon footprint in decreased travel to and from the workplace. It is projected that energy savings for decreased capacity of buildings throughout the University during Winter Recess would be approximated at $35,000 the first year. This could be expected to increase as we study logistics.
    - The closure period could be used by vendors, such as Campus Parc to work on the parking garages that will have minimal usage

    Examples:
    - University of California Lab Systems saved $28,300 during the University's 2015 holiday close-down period;
    - Cisco closed operations for 10 days during the holiday season and saved 2,700 metric tons of carbon emission. Customers benefit from the related benefits including greenhouse gas reduction, air quality enhancements, and reducing Cisco's cost to serve.
    - Commonwealth of Massachusetts found that improving holiday shutdown schedules for New Year's Day alone saved approximately $10K in energy costs.

4. By increasing efficiency and productivity
    - The cost of closing OSU during this period can be offset by the return on investment. A study conducted by West Monroe Partners in 2018 found that closing the office more days during the holidays has a direct and positive impact on in-office productivity. Employees at offices that close additional days during the holidays are significantly more likely to report higher productivity during the time that they're actually in the office (42 percent compared to 17 percent in offices that don't shut down outside of federal holidays).[1]
    - Research shows that taking a week off makes employees more productive. For some people who do not use vacation time, this may be the only "true vacation." There's ample evidence that people who take regular vacations are both more engaged at work and get more done.[2]
    - Students and faculty are typically off campus during this time, therefore workloads in many areas have naturally decreased.
    - Current faculty and staff remaining on campus are not productive as many members of committees and sub-committees are not available during this time.
    - A building closure would provide an opportunity to efficiently, safely, and deeply clean our facilities.

5. Linking with the OSU's Wellness Initiative
    - Numerous studies have demonstrated that taking time off from work can improve the overall health of employees.[3]. Vacations can cut the risk of heart disease by 50 percent for

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[1] 2018 https://www.westmonroepartners.com/Insights/Newsletters/Employee-Productivity-During-Holiday-Season.

[2] Westman, Mina & Etzion, Dalia (2007). The impact of vacation and job stress on burnout and absenteeism. *Psychology & Health*, Vol 16, issue 5, 2001, p 595-606; Zenger, Jack & Folkman, Joseph (2015). Are we more productive when we have more time off? *Harvard Business Review*.

[3] Mount Sinai Health System (2016). Systems biology research study reveals benefits of vacation, meditation; Hilbrecht, M., & Smale, B. (2016). The contribution of paid vacation time to wellbeing among employed Canadians. *Leisure/Loisir*, *40* (1), 31-54; Zhang, J. W., & Howell, R. T. (2011). Do time perspectives predict unique variance in life satisfaction beyond personality traits? *Personality and individual differences*, *50* (8), 1261-1266; Joudrey, A. D., & Wallace, J. E. (2009). Leisure as a coping resource: A test of the job demand-control-support model. *Human Relations*, *62* (2), 195-217; Perlow, L. A., & Porter, J. L.

men and 30 percent for women--but only if those men and women take more than one vacation a year.[4]
- An extended break is good for employee's mental health. Neuroscientists have found that brain structure is altered by chronic exposure to the stress hormone cortisol, which can be a major contributing factor to anxiety and depression. Feelings of calm arise from time away from work and relieve stress, which allows the body and mind to heal in ways that it couldn't if it were still under pressure.[5]

Benchmarking:

The equivalent of Winter Recess is currently in place at universities throughout the nation (*see* Appendix A below). Eight of 12 Big 10 universities have the equivalent of a winter recess (2 did not reply to the inquiry). The response from these universities is unanimous. By closing non-essential functions during this time period, staff morale has increased, and energy costs decreased.

Follow Up Items:

This proposal is being presented for consideration with the knowledge that the following issues will need to be subsequently clarified for the Winter Recess to be initiated:

1. Do we need a separate set of guidelines for the medical center?
2. Who is considered "essential staff" and will be designated to work during Winter Recess?
3. How will staff be paid during Winter Recess? This depends on whether staff is exempt, non-exempt, essential, or non-essential.
4. Do temporary and student employees receive pay for the Winter Recess?
5. If an employee is on unpaid FMLA leave, would the employee be allowed to change the designation of FMLA and be compensated for Winter Recess?
6. Can essential personnel who work/are scheduled to work during Winter Recess re-designate their time off prior to Winter Recess?
7. What are the financial implications of providing staff with additional paid time off?
8. What impact will this have on the regional campuses with shared resources?

(2009). Making time off predictable--and required. Harvard business review, 87 (10), 102-9; Fritz, C., & Sonnentag, S. (2006). Recovery, well-being, and performance-related outcomes: the role of workload and vacation experiences. *Journal of Applied Psychology*, *91* (4), 936.

[4] Gump, B. B., & Matthews, K. A. (2000). Are vacations good for your health? The 9-year mortality experience after the multiple risk factor intervention trial. *Psychosomatic Medicine, 62* (5), 608-612.

[5] https://www.allinahealth.org/healthysetgo/thrive/importance-of-taking-vacation

Appendix A – University Winter Recess Benchmarking

Benchmarking Universities were chosen by evaluating three categories: Big 10, Large R1 Universities, and State of Ohio Peers

Big 10 Universities Comparisons

The Big 10			
University	**Winter Break for Faculty/Staff?**	**Details**	**Apply to the Medical Center?**
University of Nebraska	Yes – Dec. 24-Jan. 2	Working is not required, unless deemed to be an "essential" staff member. Non-essential employees are excused from work with pay.	No. Separate rules and procedures apply to the Medical Center.
Penn State University	Yes – Dec. 24-Jan. 2	Working is not required, unless deemed to be an "essential" staff member. Non-essential employees are excused from work with pay.	No. Separate rules and procedures apply to the Medical Center.
University of Illinois	Yes – Dec. 24-Jan. 2	Close down days are considered "gift days" – employees are excused from work with pay without having to use accrued leave benefits. If required to work on one or more of those days, staff members must receive an alternate gift day to be used by June 30th of the following year.	No
University of Michigan	Yes – Dec. 24-Jan. 2	Working is not required, unless deemed to be an "essential" staff member. Non-essential employees are excused from work with pay.	No. Separate rules and procedures apply to the Medical Center.
Northwestern University	Yes – Dec. 24-Jan. 2	Essential staff that provide critical, essential services do not close. Those areas will maintain appropriate levels of staff for operations and continuity of service during this period. Staff members in those areas who are not able to be off during the Winter Recess period will be allowed to take the equivalent number of approved days off prior to August 31 of the following year. Essential staff members provide services that relate directly to the health, safety, and welfare of the Northwestern community and ensure continuity of key operations.	N/A
University of Iowa	No	N/A	N/A
University of Minnesota	No	N/A	N/A
Purdue University	Yes – Dec. 24-Jan. 2	Non-essential staff will receive pay for normally scheduled hours during Winter Recess. Essential staff required to work during the Winter Recess will be paid at their regular rate for all hours worked. Both exempt and non-exempt employees will have the opportunity to re-designate any time worked during the Winter Recess to another normally scheduled workday(s) within the current fiscal year.	No. Medical Center employees are considered essential.
Rutgers University	Yes – Dec. 24-Jan. 2	Only "essential" personnel (public works, security) are required to be at work.	Medical Centers servicing the public do not close-down.
University of Wisconsin Madison	No	N/A	N/A
University of Maryland	Yes – Dec. 24-Jan. 2	Only essential personnel and/or emergency responders work	No. Medical Center staff is considered essential.

LARGE UNIVERSITIES COMPARISONS

Large Universities			
University	Winter Recess for Staff/Faculty?	Details	Apply to the Medical Center?
Emory University	Yes – Dec. 24-Jan. 2	Staff members do not use vacation, sick leave or floating holidays during Winter Recess. Essential staff members who are required to work during the Winter Recess will be allowed to take the equivalent number of approved days off prior to August 31st of the next year.	N/A
Clemson University	Yes – Dec. 21-Jan. 2	Winter Recess is considered Paid Designated Holiday.	N/A
University of Texas at Austin	Yes – Dec. 23-Jan. 2	The University designates "essential" staff members as "skeleton crews." Vice presidents and deans determine how their reporting departments will handle skeleton crews. The Winter Break is considered Paid Designated Holiday.	N/A
University of Missouri	Yes – Dec. 24-Jan. 2	Working is not required, unless deemed to be an "essential" staff member. Non-essential employees are excused from work with pay.	No. Separate rules apply to the medical center.
Temple University	Yes – Dec. 24-Jan. 2	Any employee required to work during this period will receive compensatory time rather than holiday or overtime pay. Please note that employees of the Office of Campus Safety Services and Facilities Management will be scheduled off in accordance with the needs of those departments and applicable collective bargaining agreements.	No. The close-down does not apply to employees of the health system.
University of Pittsburgh	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	N/A
Iowa State	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	N/A
University of North Carolina	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	N/A
University of South Carolina	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	N/A
University of Houston	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	N/A
Texas A&M	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	N/A
Stanford University	Yes – Dec. 24-Jan. 2	Most university buildings are shut down during holiday break	N/A
Clemson	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	
Texas Tech	Yes – Dec. 23-Jan. 2	The University provides these days as "Designated Paid Holidays"	
University of Chicago	No	N/A	N/A

OHIO UNIVERSITIES COMPARISONS

University	Winter Recess for Staff/Faculty?	Details	Apply to Medical Center?
Ohio Schools			
Case Western Reserve University	Yes – Dec. 24-Jan. 1	Active employees have the time off for the observed holiday unless otherwise scheduled. When the holiday falls on a Saturday, the university will observe the holiday on the preceding Friday. When the holiday falls on a Sunday, the university will observe the holiday on the following Monday. Employees who work Monday through Friday will have the Friday or Monday off. Employees whose regular work day may be either Saturday or Sunday will have either the observed holiday or the actual holiday off.	
Columbus State Community College	Yes	N/A	N/A
Miami University	Yes – Dec. 24-Jan. 2	Some offices may require staff to work selected days during Winter Break based on the business needs of the department (e.g., Payroll or University Advancement). Your supervisor will inform you if you are required to work. For days when the university is closed for Winter Break that are not paid holidays, classified employees must submit vacation/comp time/personal leave if they want to be paid. This is the only time during the year that classified may take unpaid days off. Unclassified employees must use vacation time for these days.	N/A
Ohio University	Yes – Dec. 25-Jan. 1	University provides paid winter leave to employees during winter break. In some circumstances, employees may need to use one vacation day. If staff are required to work on an official university holiday, they will receive one and a half times the regular hourly rate, for all hours worked on that date, plus holiday pay for the number of hours that would normally have been worked at the regular hourly rate.	N/A
Ohio Wesleyan University	Yes – Dec. 23-Jan. 3	N/A	N/A
University of Cincinnati	Yes – Dec.25-Jan. 1	Winter Season Days were established in 2014 by University Rule 3361: 30-31-07	The UC Medical Center is a separate employer from the University of Cincinnati so the vast majority of UCMC employees are not University of Cincinnati employees.
University of Toledo	Yes – Dec. 24-Jan. 2	All staff members are off except "required" positions, which might vary annually depending on need (hospital and public safety). If staff members cannot take the time off during the close-down, they can use the additional days off provided by the University until June 30th of the following year.	Because the hospital must operate 24/7 every day of the year, specific UTMC employees cannot participate and so will not be given the additional three or four winter break days.
Wright State	Yes – Dec. 24-Jan. 2	University provides paid winter leave to employees during winter break.	N/A

Appendix B

2020 Tuition Data Summary

SP 2020	Aggregate	ETA	DTA
	Employees Who Utilized Benefit	2,284	1,726
	- University	833	728
	- OSUWMC	1,451	958
	- Retirees / Unmatched Data		40
	- Faculty	189	377
	- Staff	2,095	1,309
	- Retirees / Unmatched Data		40
	Dependents Who Received a Benefit		1,811

SU 2020	Aggregate	ETA	DTA
	Employees Who Utilized Benefit	1,543	506
	- University	508	218
	- OSUWMC	1,035	283
	- Retirees / Unmatched Data		5
	- Faculty	96	115
	- Staff	1,447	386
	- Retirees / Unmatched Data		5
	Dependents Who Received a Benefit		481

AU 2020	Aggregate	ETA	DTA
	Employees Who Utilized Benefit	2,353	1,927
	- University	842	826
	- OSUWMC	1,511	1,056
	- Retirees / Unmatched Data		45
	- Faculty	175	412
	- Staff	2,178	1,470
	- Retirees / Unmatched Data		45
	Dependents Who Received a Benefit		2,011

2020 Semester	ETA_eligible	DTA_eligible
Spring	33,856	34,765
Summer	34,105	34,974
Autumn	33,871	34,799

Note

1. OSUWMC is defined as positions in the College of Medicine, Health Sciences FGP, OSU Medical Center, or Ofc of Health Sciences, as defined in the Finance system.

2. The missing counts are due to retirees using the benefit or due to timing.

3. Where a 75% dependent tuition benefit was received, both parents who qualified for the benefit are in the applicable count of the employee utilizers of DTA benefit.

4. The basis for the utilizers is the presence of enrollment hours.

2020 Employee Tuition Assistance Plan

Reviewed data for Spring, Summer and Autumn terms

3,445 unique employees utilized the employee tuition assistance for one or more terms

1,348 enrolled in Undergraduate program

2,101 enrolled in Graduate program

Total employee tuition paid in 2020 = $26,659,206.05

	Spring 2020	Summer 2020	Autumn 2020
Total ETA Participants	2,213	1,566	2,384
Undergrad greater than 6 hours	365	243	406
Graduate greater than 6	506	219	523
Total greater than 6	872	462	929

UNIVERSITY STAFF ADVISORY COMMITTEE

Annual Report
2017-2018

THE OHIO STATE UNIVERSITY

Subject: University Staff Advisory Committee (USAC) 2017-2018 Annual Report
Date: 3/27/2018

From: The University Staff Advisory Committee
                 Liz Gordon-Canlas, Chair
                 Tom Gessells, Chair-Elect
                 Megan Hasting, Vice-Chair Treasurer/Recorder
                 Nikole Prete, Vice-Chair Communications

To: Michael V. Drake, President

The 2017-2018 year for the University Staff Advisory Committee (USAC) has been robust and full. Our committee has partnered with many key strategic leaders, campus projects, and staff in order to advance the mission of the University and to advocate for staff. As the President's staff advisory committee, USAC is proud and grateful for the multiple opportunities to engage positively with President Drake and other leaders across campus.

The 2017-2018 USAC Annual Report offers updates and closures on recommendations made previously, including those around Rewards & Recognition, changes to the Employee Emergency Fund, and an increase to the funding in the Staff Career Development Grant (SCDG). The report then contains next steps USAC will take to advocate for the staff experience, such as building more meaningful relationships with senior leaders and developing a long-term vision for the role of diversity and inclusion on USAC. Finally, the report reviews the ways in which USAC fostered meaningful staff engagement through our advocacy work, events and outreach.

USAC has developed a multi-year plan to foster consistency in our vision and focus over the next two years. Sharing this vision and high-level road map will foster alignment within USAC, amongst staff, senior leaders and across the university. Our mission will remain consistent, advocating on behalf of staff.

Over the past several years, USAC has made recommendations to senior leaders regarding key projects. These recommendations can take several months to resolve and we would like to share the current place of some previous recommendations.

Rewards and Recognition

In December 2015, the Office of Human Resources convened a task force of stakeholders, representing both faculty and staff interests, to examine the current programmatic Reward and Recognition activities and events. The group met on several occasions through April 2016, to discuss and analyze the current state in order to provide recommendations around these OHR sponsored activities

Summary

Overall, the Task Force in May 2016 agreed that recognition at a central University-wide level adds value to the experience of faculty and staff working at Ohio State. The committee agreed that the events produced by the Office of Human Resources are important and worth continuing, with a few exceptions. The most significant findings include:

- Distinguished Staff and Distinguished Diversity Enhancement Awards were unanimously recognized by the task force as important for the University to continue. Since 2016, each of these distinctions also includes recognition on the agenda of the Board of Trustees, Talent & Compensation committee.

- While there was a task force recommendation to eliminate both of the retirement and service recognition events, to replace both events with an alternative that would honor a broader audience and provide earlier recognition of a faculty or staff member's career would require significant funding investment far greater than redeployment of current resources (budget/staff).

- University-wide events are an equalizer for those colleges/units who do not recognize retirement or years of service milestones.

- To achieve equity in recognition practices of campus and medical center, significant increase (>5x) in funding resources would be required, along with incremental staffing.

- Tradition at Ohio State is a strong factor in maintaining the event format discontinued by some employers. The retirement dinner has been celebrated annually for nearly 75 years.

- Because there are fewer recognition events for staff when compared to faculty, any discontinuation further reduces opportunities to appreciate staff contributions.

Resolution

In December 2017, Susan Basso made the decision to maintain status quo with core University-wide events managed by OHR Special Events; the outstanding item of whether to transition the Staff Art Show remains open to discuss with USAC leadership.

Appendix A - Rewards and Recognition Task force Final Report
Appendix B - Unit Level Rewards and Recognition Resolution

Staff Career Development Grant Funding

Summary

As part of the FY 2016 annual report, USAC proposed an increase in funding of $150,000 for the staff career development grants. An additional $50,000 was asked for as part of the FY 2017 annual report. At this point, there has been no increase in funding. The past year has been another successful year for the SCDG process. In 2017-2018 a total of 522 applications were received and a total of $118,480 dollars were awarded.

Resolution

As a result of the ongoing success of the SCDG process, the Governance Subcommittee, in partnership with the Office of Human Resources, worked on a new proposal for increased SCDG funding to be submitted to University leadership. The proposal requests an additional $50,000 in annual funds for the SCDG process. The increase in funding would allow for an increase in disbursement for an individual application (from $1,000 to $1,500) and would incentivize group applications using a tiered funding model. Additionally, the request would provide additional manager development opportunities by allowing managers to use the manager grant funds to attend conferences, events, workshops, etc. that are offered outside of the University.

Appendix C - Full Staff Career Development Grant Funding proposal

Employee Emergency Funding and Model

Summary

As part of the FY 2017 annual report, USAC proposed: 1) Adjusting the award maximum from its current $500 level to $1,000 per application, 2) Changing the award from once in a lifetime to a 5 year renewable grant, 3) Financial management training available to those requesting a second grant after 5 years and 4) Decreasing the eligibility wait period from one year to six months of continuous service.

Resolution

In order to institute the 2017 recommendations, as well as to keep the fund sustainable, financial resources need to be obtained to meet the needs of our employees during times of hardship. USAC's 2018 recommendation includes moving forward with the original 2017 recommendations as well as partnering with OHR to obtain one-time funding of $50,000 from the Office of the CFO and partnering with the Office of Advancement to establish an endowment to fund these grants for years to come.

Appendix D - Full 2018 Employee Emergency Fund Report

USAC members have spent the year identifying future projects that will impact the staff community at the University. This has resulted in a series of next steps that will continue into the 2018-2019 year. USAC will continue to prioritize these efforts in order to best advocate for staff.

Next Step: Continued Engagement with the Enterprise Project

The Enterprise Project will transform the workplace into one that will enable us to better support the University's strategic plan as well as the teaching, research, service and patient care missions of the University. USAC is viewed as a key partner in this project and looks forward to providing support and feedback in the areas of communication and change management. In addition to meeting with key Enterprise Project leaders, SCBS, in particular, has established a connection with the change management team. We look forward to continuing to support and champion this important University transformation.

Next Step: Continue Building Relationships with Senior Leaders

President Michael V. Drake

USAC will continue to strengthen our relationship with the president. Prior to a lunch discussion between USAC and the president on the topic of the University's strategic plan, USAC leadership met with President Drake to review strategies and imperatives for the year. The president continues to meet with USAC leadership on a quarterly basis.

The calendar year ended with a "conversations" event on December 11, 2017. Utilizing questions collected from staff prior to the event, USAC's chair-elect facilitated "Conversations with President Drake" around multiple themes such as the University's Strategic Plan, staff diversity and inclusion efforts, and other timely topics. This live audience event was also broadcast via live stream so remote staff could view and replay after the event. USAC received multiple points of feedback from a follow up survey after the event. Themes emerging from this feedback spoke to a desire to hear more from senior leaders around topics like compensation, diversity, and campus safety among others. Staff enjoyed hearing directly from President Drake and are eager to hear from other University senior leaders. This feedback has informed other next steps with senior leaders listed below.

USAC would like to continue to host this Conversations event with President Drake, with the possibility of considering alternate locations in the future.

Executive Vice President and Provost Bruce McPheron

USAC began engaging with Provost McPheron in 2015. Dr. McPheron has been a collaborative partner with USAC, often providing institutional-wide insight and strategy that impacts staff. An engagement survey was sent to local University staff advisory committees (SAC) during the first week of March 2018 to collect feedback to present to the Provost and other senior academic leaders. The survey is focused on the staff experience within the academic units and insight to the structure of SAC groups.

Using information from the local Staff Advisory Committee survey, USAC will provide insight into the experiences of academic unit staff engagement to Provost McPheron and other academic leaders.

Susan Basso, Senior Vice President for Talent, Culture and Human Resources

Engaging with Susan Basso is critical for USAC. In so many areas that directly impact staff, Susan's leadership will be invaluable. USAC is eager to work with the Office of Human Resources and monthly meetings are scheduled with Susan Basso and USAC chair and chair-elect. In addition, we will facilitate dissemination of the OHR Strategic Plan.

USAC is hosting "Conversations with Susan Basso" on May 10 at the Ohio Union to allow Susan to directly engage with staff about the OHR strategic plan. Like the December conversations event, questions will be collected from staff in advance. OHR has been a powerful partner in advocating for the staff experience. USAC knows that a strong relation-ship with Susan and her team will allow us to be involved in the execution of the OHR Strategic Plan and any further work groups or task forces that develop out of this plan.

While USAC's work with President Michael Drake, Provost Bruce McPheron, and Susan Basso are central to our advocacy work, we've had the great pleasure of connecting with multiple campus leaders during the 2017-2018 year. Those leaders are indicated in the graphic on page 8. See Appendix D for the Senior Leader Packet that was distributed to many different leaders throughout the year.

<div align="right">

Appendix E - Senior Leader Packet
Appendix F - Tuition Benefit Benchmarking
Appendix G - SCBS Academic Staff Survey

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Senior Leader Engagement

President
Michael V. Drake

Engagement:
Quarterly
Top Discussion Points:
Ohio State Strategic Plan,
Diversity and Inclusion Efforts,
University Transformation

Provost
Bruce McPheron

Engagement:
Quarterly
Top Discussion Points:
Ohio State Strategic Plan,
Staff Experience in
Academic Units

Senior VP Talent, Culture & Human Resources
Susan Basso

Engagement:
Monthly
Top Discussion Points:
Young Professional
Engagement,
OHR Strategic Plan,
Class and Comp. Re-design

Former Senior VP & CFO
Geoff Chatas

Engagement:
Yearly
Top Discussion Points:
Digital Flagship Initiatives,
CEMP Funding Allotment

Interim Senior VP & CFO
Mike Papadakis

Engagement:
Yearly
Top Discussion Points:
Digital Flagship Initiatives,
CEMP Funding Allotment

Associate Vice President, Total Rewards
Joanne McGoldrick

Engagement:
Quarterly
Top Discussion Points:
Total Rewards Changing
Landscape, Health Plan
Oversight Committee

Chief Wellness Officer
Dr. Bernadette Melnyk

Engagement:
Quarterly
Top Discussion Points:
OUH&WC, Health Athlete
Program, Healthy Working
Community

Director, Employee Assistance Program
Sharon Saia

Engagement:
Quarterly
Top Discussion Points:
Expansion to the Employee
Emergency Fund

Interim Dean, Mansfield
Dr. Norman Jones

Engagement:
Yearly
Top Discussion Points:
Regional Campus Leader
Engagement: Meeting
Scheduled for May 10, 2018

Chair, President and Provost's Council on Women
Jacquelyn Meshelemiah

Engagement:
Yearly
Top Discussion Points:
Collaborative Relationship
Development

Chair-Elect, President and Provost's Council on Women
Amy Lahmers

Engagement:
Yearly
Top Discussion Points:
Collaborative Relationship
Development

Senior Associate Vice President Human Resources, Wexner Medical Center
Alison Mincey

Engagement:
Quarterly
Top Discussion Points:
Collaborative Relationship
Development

Additional Engagements:

Attendance at Board of Trustee's Meetings
Wexner Medical Center Leadership
Student Life Vice President: Dr. Javaune Adams-Gaston
Interim Vice Provost for Diversity and Inclusion and Chief Diversity Officer; James L. Moore, III

Next Step: Staff Engagement Strategies

USAC develops an engagement strategy with Medical Center Leaders

USAC engaged multiple times with Alison Mincey, who is the current Senior Associate Vice President, Human Resources, for the Wexner Medical Center. Alison has been a long-standing champion for USAC. She has encouraged our continued involvement with medical center leaders. USAC is interested in more medical center staff engagement, which mirrors the work we are doing with the ONEvoice Engagement Survey.

Alison is also interested in partnering with USAC in order to continue our work around the Staff Career Development Grants and helping more medical center staff access these resources. USAC leadership also met with Medical Center HR staff members on the outcomes of their recent employee ONEvoice Engagement Survey. During the meeting, USAC was able to identify some trends in the survey based off of previous reports. Over the next 6-8 weeks, Medical Center HR will talk more about feedback and how to move forward with the results. As Medical Center HR work through the feedback sessions, they will identify themes and suggest areas where USAC can partner with the medical center.

USAC hopes to advocate for the improvement of career development, training, tools and funding. USAC envisions efficient communication around the timeline for the SCDG process so that more medical center employees are encouraged to apply.

Engagement with Ohio State Young Professionals

In February 2018, USAC chair Liz Gordon-Canlas met with the Ohio State Young Professional ERG leaders. This meeting took place after Senior Vice President Susan Basso expressed an interest in connecting more with millennial identified staff members and other young professionals at Ohio State.

This connection is in its early stages, but USAC is eager to continue to build a relationship with the young professionals at Ohio State by scheduling a collaboration meeting during the summer or early fall of 2018.

Engagement with Newly Hired Staff Members

Newly hired Ohio State staff members hold a unique view of the staff experience at the University and Medical Center. USAC has focused engagement efforts. The New Hire Survey is the result of an earlier USAC recommendation to better understand the experiences of newly hired staff members. This survey was sent to 2956 individuals in 2017 and we received 1314 completed responses for a 44% response rate. Results are currently being summarized and are continually considered to help ensure the on-boarding process is working to maximize the success and positive impact of our new hires.

Other efforts to engage with newer staff members will be considered as USAC looks to remain connected with the Office of Human Resources on key projects. USAC will also engage with newly hired staff at an event to take place in summer of 2018.

Regional Campus Engagement

While the number of staff employed at the University's regional campus may seem small in the shadow of the 25,000+ employed at the Columbus campus, regional campus staff members play a critical role in advancing the mission of the University. The Mansfield campus is home to one of our own members, Ginny Corso.

During Staff Appreciation Week in July 2017, several USAC members attended the Marion campus Staff Fun Day. In November 2017, USAC hosted a Regional Staff Retreat with 22 attendees from various campuses: Lima (3 staff members), Mansfield (2), Marion (7), Newark (1), ATI/OARDC (5), and four USAC members from the Columbus campus. This day-long retreat featured information about USAC and each regional Staff Advisory Committee. USAC members gathered shared themes, mostly that the regional campus SAC leaders and members expressed a desire to stay engaged with each other.

When asked in a post-retreat survey if participants were interested in having future retreat, 100% answered "yes". Some of the other feedback on the retreat that USAC received is below:

- "I loved hearing about how SAC's work on other regional campuses. It was great to hear what works on other campuses."

- "The opportunity to openly discuss concerns and positive experiences. It was wonderful to not feel as alone in the large campus."

USAC plans to hold a spring business meeting at the Mansfield campus. We will continue to foster our relationship with the regional campuses with regular communication efforts. We will propose different forms of engagement for Staff Appreciation Week to be held at the regional campuses. Finally, USAC plans to host a second regional staff retreat in the fall of 2018.

Communication Outreach and Social Platforms

Historically, USAC has utilized bi-annual all-staff newsletters, Facebook, Twitter, OnCampus Today and printed materials to communicate with the staff community. In an effort to connect with staff and USAC partners on a monthly basis, the committee purchased a Constant Contact subscription for e-mail newsletters. Currently the reach includes local staff advisory committee's, current USAC membership, member supervisors, USAC alumni and any staff member who signs-up. The first edition was sent in October 2017, there are currently 517 people subscribed, with an average open rate of 44%.

In addition to Constant Contact, USAC launched a LinkedIn page in June 2017 to connect and share updates with staff on a more business-oriented social platform. LinkedIn allows USAC to easily identify Ohio State staff members and have found a larger staff audience on this platform. Currently the page has over 500 "connections" with the Ohio State community.

USAC plans to renew the Constant Contact membership for another year to continue monthly engagement.

Next Step: Future of Diversity and Inclusion within USAC

During the FY 2016 annual report, it was recommended that the USAC chair appoint a Diversity and Inclusion (D&I) Task force. This task force convened during the 2016-2017 year, focusing on Employee Resource Groups (ERGs) and other critical Diversity and Inclusion projects that directly impact staff. After a productive first year, the task force was reappointed by the 2017-2018 USAC chair, Liz Gordon-Canlas. Over the past year, the D&I task force has been asked to review how the work of D&I lives on USAC and its future with the committee. The current D&I Task force made a recommendation to create an Inclusive Excellence (IE) Subcommittee within USAC to:

- Integrate deliberate efforts and practices that support a more inclusive culture as well as to continue collaboration with stakeholders across campus.

- Continue collaboration with established partnerships across campus to promote inclusive initiatives that are significant to staff.

This recommendation was proposed in a USAC business meeting and USAC members voted to create a 4th USAC sub-committee of Inclusive Excellence.

USAC will implement plans to create a fourth subcommittee focused on Inclusive Excellence by drafting bylaw language, additional points of clarification for the USAC Procedural Manual, and the USAC Chair-elect (Tom Gessells) appointing a subcommittee leader.

Appendix H - Diversity and Inclusion Task force Listening Session Common Themes
Appendix I - Recommendations for the creation of a new Inclusive Excellence (IE) Sub-Committee

USAC Members: **27**

Total years of university USAC member experience:

232

Senior Leaders engaged in 2016-17: **12**

900 scoops of ice cream distributed during Staff Appreciation Week

Regional Staff Retreat attendees: **22**

Staff engaged during autumn 2017 Diversity and Inclusion listening sessions: **45**

157 Conversations with President Drake event attendees

12

USAC is committed to regular engagement with staff and being a consistent voice on behalf of staff. The chart below summarizes the key initiatives and activities for FY 2018 and 2019. These align with the pillars of USAC's multi-year plan as well as the University's Strategic Plan, Enterprise Project and USAC's Mission. We intend to update this plan periodically.

- Continue prioritizing our efforts in the three existing subcommittees: Governance, Outreach and Engagement (O&E) and Staff Compensation and Benefits (SCBS).

- Focus on diversity & inclusion to create a culture of inclusive excellence for staff across the University.

- Cultivate relationships with key leaders to represent the needs of staff.

- Remain involved with the Enterprise Project to ensure staff perspective is accurately represented.

- Align USAC initiatives in areas relating to or impacting staff with the University's Strategic Plan.

This chart shows major USAC initiatives and activities that are a priority to USAC. The remainder of the report covers some of these accomplishments and the impact USAC has had so far during the 2017-2018 year.

Major USAC Initiative/Activity	Pillars for USAC EOY Report			Strategic Alignment			Fiscal Year 2018				Fiscal Year 2019			
	Sr Leaders	University Transformation	Direct Staff Impact	OSU Strategic Plan	Enterprise Proj	USAC Mission	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Ohio State Strategic Plan	✓	✓	✓	✓		✓	●	●	●	●	●	●	●	●
Cultivate relationships with senior leaders	✓					✓	●	●	●	●	●	●	●	●
Governance focus areas														
Staff Career Development Grants			✓			✓	●		●		●		●	
Reinvisioning Manager Professional Development Opportunities			✓			✓			●					
Appointment and participation in external committees		✓				✓	●	●	●	●	●	●	●	●
University Policy Review/Updates		✓	✓			✓		●	●			●	●	
USAC Bylaw Review/Updates			✓			✓		●				●		
Outreach & Engagement focus areas														
Staff Appreciation Events			✓			✓	●				●			
Community Outreach Engagement			✓			✓	●	●	●	●	●	●	●	●
Conversations with the President Event	✓		✓	✓		✓		●				●		
Conversations with Susan Basso Event	✓		✓			✓			●					●
Regional Campus Retreat			✓			✓		●				●		
Engagement with college and unit based staff advisory committees			✓			✓	●	●	●	●	●	●	●	●
Staff Benefits and Wellness Expo			✓			✓			●				●	
New USAC Member Engagement			✓			✓			●	●			●	●
Staff Compensation and Benefits focus areas														
Health & Wellness			✓			✓	●	●	●	●	●	●	●	●
Rewards and Recognition			✓			✓	●	●	●	●	●	●	●	●
Enterprise Project		✓	✓	✓	✓	✓	●	●	●	●	●	●	●	●
Inclusive Excellence focus areas			✓		✓	✓								
Collaboration across various campus D&I groups		✓	✓			✓	●	●	●	●	●	●	●	●
Listening Sessions			✓			✓		●				●		
Improve partnership with w/PPCW, Senate Diversity and ODI			✓			✓	●	●	●	●	●	●	●	●

External Committee Reach

The work of advocating for staff cannot be limited to just USAC. In an effort to engage many staff voices around many tables, USAC has the opportunity to appoint staff members to external committees that are a part of University Senate and other University project teams.

Current USAC appointees and 2017-2018 external committee highlights are reflected in the chart on page 15.

Ohio Staff Council of Higher Education

Athletic Council

BuckeyesAct

Health Plan Oversight Committee

Ohio Union Council

Senate Steering

Council on Physical Environment

Senate Diversity Committee

Recreational Sports Committee

Senate Fiscal Committee

Sesquicentennial Planning Team

Employee Emergency Fund

Council on Distance Education, Libraries & Information Technology

Senior Communication and Marketing Council

Parking Advisory Committee

One University Health and Wellness Council

THE OHIO STATE UNIVERSITY

External Committee Appointees and Highlights	
External Committee Appointee(s)	**2017-2018 Highlights**
Ohio Staff Council of Higher Education	
Jodie Joerg Andreoli Lila Andersen	• Strengthened relationship with Chancellor's office • Created recruitment subcommittee to enrich OSCHE membership experience
Council on Distance Education, Libraries, and Information Technology	
Sarah Dawson	• No updates at the time of report publishing
Ohio Union Council	
Andrew Jordan	• Approved University Catering alcohol policy revisions • Presentations from OUAB, BuckeyeThon, and D-tix
Health Plan Oversight	
Megan Hasting	• Focus on Your Plan for Health's move to Virgin Pulse and proposed Health Plan Narrow Network initiative and potential impacts to employees including accessibility, patient impact, and transition period
Council on the Physical Environment	
Lisa Mayhugh John Blust	• Discussion about transportation issues due to campus growth and long-term transportation plan • Discussion about availability of campus food services for faculty and staff and presentation from campus dining • Further review of Comprehensive Energy Management Plan and impacts
Recreational Sports	
Brian Keller	• Discussion of proposed fee change for rec sports/RPAC • Announcement and discussion surrounding departure of Director of Rec Sports
Employee Emergency Fund	
Tom Gessells	• Continued the pursuit of the recommendation to increase EEF gifts from $500 to a maximum of $1,000 • Advocated to change the EEF gift from once in a lifetime to a 5 year renewable grant • Decision to decrease the eligibility wait period from one year to six months of continuous service • Seeking interim funding from CFO and beginning work to establish an endowment to fund going forward
Senate Fiscal	
Gerhard (Gerry) Raimann	• Review and approval of differential fee requests, composite benefit rates, overhead rates for earnings units, and support office budget requests • Review of financial impact of parking contract • Funding of patent expenses for the Technology Commercialization Office • Review of summer tuition discount and financial impact, tuition guarantee, and all-funds budget
Athletic Council	
Kevin Petrilla	• Review of athlete missed class time and revision to coaches reporting template to better address how coaches handle missed class • Discussion of student athletes' role in social justice, decision that OSU will support student athletes in their social justice decisions • Discussion and presentation of new athletics facilities • Discussion and recommendations around football ticket tiered pricing, changes to men's basketball ticket pricing, and golf course dues
Diversity	
Derek West Megan Sayres	• Presentations and discussions about BART reporting system and Title IX updates and changes • Discussion about OHR Affirmative Action Policy and division of policy into two separate policies
Parking Advisory Committee	
Andrew Jordan	• Introduction and review of new technology, NuPark • New garage access equipment and parking tracking improvements • Introduction of space tracking for surface lots • Review of parking utilization and changes to concessions agreement
Senate Steering	
Elizabeth Gordon-Canlas	• Sponsored resolution requiring sexual misconduct training for all faculty, staff, students and administrators • Reviewed benchmarking of staff presence on Big Ten university governance groups • Championed staff experience on university wide agenda items • Approval of all University Senate agenda items

USAC Service

The member experience on USAC is impactful for many reasons, one of which is the opportunity to serve the Ohio State and greater Columbus communities. USAC members frequently engage in acts of service as a way to emulate the ways staff can also be meaningful contributors to the larger community.

USAC members volunteered with Special Olympics, sorted donations at the Star House and the Buckeye Food Alliance, and planned the "Hungry Hearts" food drive that benefited the Buckeye Food Alliance.

Staff Appreciation Week and Related Events 2017

Staff Appreciation Week is one of the ways USAC, in partnership with OHR, celebrates and recognizes staff members for all of their efforts. Staff Appreciation Week kicks off a number of summer and early fall events geared towards the staff community, including an ice cream social, a football ticket giveaway, a school supply drive, and a staff tailgate party.

The ice cream social featured 900 ice cream treats as well as games and a photo booth. Provost McPheron was present to greet and interact with staff. USAC has historically had the opportunity to giveaway 50 pairs of football tickets. A school supply drive was held in conjunction with the giveaway to support schools in the University Area—Cranbrook Elementary, Weinland Park Elementary, and Hubbard Elementary.

The staff tailgate party was well served by USAC volunteers working in partnership with OHR. We also distributed USAC marketing materials including hot cards, branded cell phone pockets, zipper totes, and fortune cookies with staff specific messages inside. Other staff appreciation events were a visit to the Marion campus Staff Fun Celebration as well as the Columbus campus, Student Life Staff Celebration.

Staff Benefits and Wellness Expo – Formerly Hidden Benefits Fair: March 13, 2018

The Staff Benefits and Wellness Expo (SBWE) event was organized by USAC in partnership with the Office of the Chief Wellness Officer, Buckeye Wellness, OSU Health Plan and Your Plan for Health.

This event features a number of diverse vendors from across the campus and local Columbus businesses. This year we added 8 breakout sessions focused on 4 different wellness topics with 183 staff members signed up in advance. USAC also offered free professional head shots, with 93 staff members receiving head shots. We estimate close to 900 people in attendance, an increase by almost 200 from the 2017 event!

Membership Roster

Name	Title	Unit
Executive Committee		
Liz Gordon-Canlas, Chair	Asst Director, Residence Life	Office of Student Life
Tom Gessells, Chair Elect	Dir, Information Technology	OSU Health Plan
Megan Hasting, Vice Chair Treasurer/Recorder	Asst Director, Center for Latin American Studies	Office of International Affairs
Nikole Prete, Vice Chair Communications	Facilities & Marketing Coordinator	Office of Student Life
Governance Subcommittee		
Megan Sayres, Chair	Director, Student Activities	College of Medicine
Lisa Mayhugh, Co-Chair	Assoc Director, Clinical Skills	College of Medicine
Marilyn Frueh	Sr Org Develop Consultant	Office of Human Resources
Jodie Joerg-Andreoli	Human Resources Manager	Comprehensive Cancer Center
Abby Whaley	Asst Director, RPAC Facility Ops	Office of Student Life
Sunny Zong	Sr Grants & Contracts Acct	College of Medicine
Outreach & Engagement Subcommittee		
Kelli Kaiser, Chair	Administrative Coordinator	College of Medicine
Kris Villilo, Co-Chair	Director, Member Relations	Office of Student Life
Morgan Buckner	Assistant to the Director	Nisonger Center
Ginny Corso	Academic Program Coordinator	Mansfield Campus
Melanie DiFeo	Sr Dir, Marketing & Comm	Fisher College of Business
Traci Laub	Workers Comp/Disability Claim Mgr	Office of Human Resources
Staff Compensation & Benefits Subcommittee		
Andrew Jordan, Chair	ARC Coordinator	Student Life – Rec Sports
Cindy Davis, Co-Chair	Program Manager SEI	University Registrar
Christine Benadum	Assoc Director, Special Events	Fisher College of Business
Stacey Copley	Training Coordinator	Wexner Medical Center
Tim Lombardo	Instructional Designer	Office of Distance Education & eLearning
Aaron Moore	Residence Hall Director	Office of Student Life
Chrissy Sprouse	Lead Human Resource Specialist	Office of Academic Affairs
Diversity & Inclusion Taskforce		
Cesar Seguil, Chair	Program Admin, Academic Affairs	College of Pharmacy
Twhila Holley	Coordinator, Student Services	Fisher College of Business
Courtney Sanders	Grad Program & Chair Coord	Political Science
Tracey Pawlowski, Ex-Officio	Project Mgr, ERSRM, T&L&D	Office of Human Resources

Appendix A - Rewards and Recognition Task force Final Report
Appendix B - Unit Level Rewards and Recognition Resolution
Appendix C - Full Staff Career Development Grant Funding Proposal
Appendix D - Full 2018 Employee Emergency Fund Report
Appendix E - Senior Leader Packet
Appendix F - Tuition Benefit Benchmarking
Appendix G - SCBS Academic Staff Survey
Appendix H - Diversity and Inclusion Task force Listening Session Common Themes
Appendix I - Recommendations for the creation of a new Inclusive Excellence (IE) Sub-Committee

Staff Matter:

6 Easy Ways to Appreciate Your Team

Research shows that praise and commendation from managers was rated the top motivator for performance, beating out other noncash and financial incentives, by 67% of workers.* The University Staff Advisory Committee (USAC) compiled high impact, *low to no cost* ways that YOU can incorporate rewards and recognition into your unit!

Send a Recognition Email

to your staff or team members, especially if it is a busy time of year, during challenging projects, or after successful work outcomes.
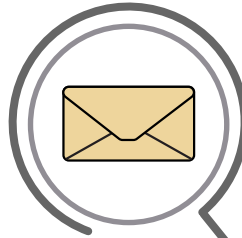
Integrate Recognition Activities

into existing meetings by encouraging staff to acknowledge each other and share achievements.

Nominate Staff

for unit, college, or university level awards.
- Check out this link of Ohio State award opportunities.
- Commit to nominating at least one worthy employee per award competition.
- If your unit does not have an award program, create one with your HR team.

Create a Committee

with leadership support to organize unit-based activities focusing on wellness, culture, professional development, and to promote good work.
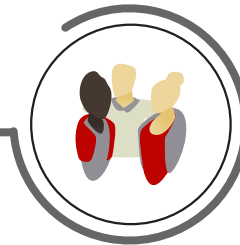
Schedule Recognition Luncheon(s)

No available budget? Organize a potluck instead and encourage your employees to bring their favorite dish.
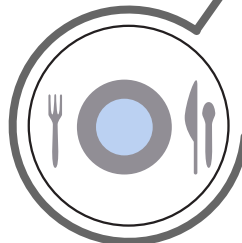
Encourage Staff Growth

by engaging in professional development activities, such as coursework, conferences, and certificate programs.
- Tell your staff about Staff Career Development Grants that support these initiatives or create your own!

*McKinsey Motivating People, Getting Beyond Money, 2009

Do you have other ideas to share? Contact usac@osu.edu.
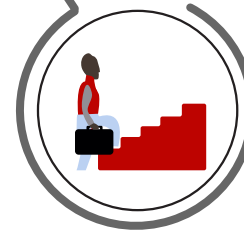
Appendix E

FLEX WORK TOOLKIT OVERVIEW

Introduction

The University Staff Advisory Committee (USAC) Staff Affairs Subcommittee (SAS)* is charged to engage with University policies, initiatives and promoting equity for staff. In summer 2018, SA identified four key goals that would drive much of the subcommittee work throughout 2018-19, one of which was to collaborate with the President and Provost's Council on Women (PPCW) to create a campaign to raise awareness regarding the Flexible Work Policy (a charge given to PPCW by the President and Provost).

Institutional Challenges

The current Flexible Work Policy (6.12) has been in place at Ohio State since 2011. While the policy is clear about the possibility of and benefits to a flexible working arrangement, the execution of this policy is applied unevenly within various units and colleges of the university. Through SCBS's work this year, we identified five key challenges to the effective utilization of the Flexible Work Policy:

- While university leadership recognizes and supports the existence of the policy, support from individual unit leadership varies. Some employees have indicated that unit leaders have noted that the Flexible Work Policy is not utilized at all within the unit.

- Not all roles at Ohio State are conducive to a flexible work arrangement and not every position lends itself to flexible work. However, there seems to be a significant disparity *within* units regarding the application of flexible work arrangements for similar roles (some employees are able to use flexible work, while other employees in similar roles are not allowed).

- The policy encourages managers to be transparent, but there is no current requirement on the Flexible Work Arrangement Proposal for managers to justify why a flexible work request is denied. Such a lack of transparency may lead to miscommunications about the policy itself, poor supervisor/employee relations, and negatively impacts the employee's ability to use the policy in the future.

- There is a general lack of awareness about the policy by both employees and managers, indicating a need for greater value placed on openness and flexible work arrangements in the workplace. A lack of resources about how to implement, monitor, and evaluate flexible work arrangements is also a challenge for managers and employees.

- There is currently no mechanism to collect data on flexible work arrangements at Ohio State (requests submitted, requests approved or denied, ongoing arrangements). No data is being collected and aggregated at the college or university level that provides insight into the current use of the policy.

*The Staff Affairs Subcommittee was previously called the Staff Compensation and Benefits Subcommittee up until July 2020

SAS Response to Challenges

To address these challenges, USAC has partnered with PPCW to create a "Flexible Work Tool Kit," to provide valuable resources that managers and employees across campus and the Medical Center can utilize when discussing flexible work arrangements. To develop the tool kit, members of SAS conducted interviews of employees and managers to gain a better understanding of the benefits and challenges around flexible work arrangements.

The Flexible Work Toolkit

The tool kit, which will be housed on the USAC website, will include the following resources:

- *Flex Work "Road Show" PowerPoint*, that HR professionals and supervisors can share;
- *Flex Work Flyer*, to distribute to employees and widely raise awareness about the policy;
- *Flex Work Scenarios*, showing the variety of flexible work arrangements to help employees better understand the possible application of the policy to their specific situation;
- *Conversation Guide with your Manager about Flex Work*, to provide communication strategies, performance tools, and negotiation tips to help set up a flexible work arrangement; and
- *Flex Work Spotlight video*, to highlight the successes of individuals and units who have successfully implemented flexible work arrangements.

Work Remaining

SAS is currently making final edits to the Flex Work Toolkit, and once finalized, the committee will socialize these resources with the policy owner in the Office of Human Resources to ensure that there is consistent messaging about the policy. SAS will continue to collaborate with PPCW to widely publicize the Flex Work Toolkit across campus and the Wexner Medical Center throughout Spring 2019.

SAS members also plan to meet with members of the OHR policy team to discuss ways to ensure alignment of messaging around the Flex Work policy. This meeting will take place in April.

Recommendations and Next Steps

SAS recognizes the lack of data available on the use of flexible work arrangements at Ohio State, which leads to potential issues of inequities and disparities around how flexible work is made available to employees. In addition, a lack of data prevents university leadership from clearly understanding the impact that flexible work has on the employee community.

To continue promoting The Ohio State University as a workplace of choice, SAS believes that data collection and reporting regarding the Flex Work Policy is imperative. SAS echoes the recommendation of PPCW to track the use of flexible work arrangements university-wide and share that data annually. Data collection may include:
- Number of formal requests for flexible work arrangements received by the unit each year;
- Number of requests approved;
- Number denied and justification for denial;
- Number of current, ongoing flexible work arrangements
- Demographics of employees requesting flexible work arrangements

SAS believes that the university is at an optimal stage to consider the creation of a process and workflow for Flexible Work data collection as the Enterprise Project and overall business transformation continues to

be built out. To this end, SAS will engage with key partners over the next 6 months to recommend that a data collection mechanism be integrated into the new business processes being established.

SAS echoes PPCW's recommendation to update the Flexible Work Arrangement proposal form to include a justification on the form, requiring managers to provide a business reason for denying a flex work request. This simple, but effective, addition to the form will provide enhanced clarity around flex work decisions, reduce inconsistencies in the approval of flex work requests within units, and ensure proper communication between employees and their supervisors.

From this work, SAS recognizes the incredible potential front-line and mid-level managers have on the ability to promote flexible work arrangements and enhance the employee experience. To this end, SAS plans to explore the possibility of creating a USAC Manager Award to recognize the efforts that managers make to create a productive and flexible work environment within their units.

CONVERSATION GUIDE WITH YOUR MANAGER ABOUT **FLEXIBLE WORK ARRANGEMENTS**

Ways to Prepare

- Familiarize yourself with the Ohio State University Flexible Work Policy (HR policy #6.12).
- If anyone in your unit or college has a flexible work arrangement, ask if they would be willing to speak with you about it. Get ideas from colleagues who have a similar position in another unit. Having an idea of what already works may be helpful as you frame your request.
- Set a meeting with your manager, leaving plenty of time to have a conversation without being rushed. Notify your manager ahead of time that you want to talk about a flexible work schedule.

Meet with your Manager

- Bring a completed copy of the [Flexible work arrangement proposal](#) and read it in advance.
- Write and discuss a proposal with your manager.
    - o Set a clear plan before the meeting about what your ideal flexible work schedule will look like. Present details to your manager about what your optimal schedule will be and how you will adjust your responsibilities to continue to be successful in your role.
    - o Come to the meeting with suggestions for frequency and terms for evaluation of your flex work schedule. Outline how your performance objectives will continue to be met.
    - o Share any needs you may have from your employer such as technology or equipment.
    - o Anticipate questions that may come up and make sure you have an answer for them.
- Explain why a flexible schedule will benefit your unit/team, using data to make your case. ([Example](#))
- If your manager does not like your proposal, ask questions about other options that may be available to you. You may also consider offering a trial period; remember, this is a negotiation. You may need to be open to collaborating with your manager to find a solution that works for both of you.

If your Proposal is Accepted

- Create a communication plan to share your new arrangement with your colleagues. Identify potential challenges (like office coverage or meeting times) that may need further discussed.
- Continually touch base with your manager. Ensure they are comfortable with the arrangement, and if not, identify solutions to these challenges.
- Communication is key. Remember, you are proposing this arrangement, so it is important to be responsible for making it work with your manager and your office colleagues. Consider proposing a check-in one month after the flexible work arrangement begins.

If your Proposal is Denied

- Ask why your request was denied. Was it your proposal? Position? Current job performance?
- If possible, work with your manager to identify steps to take that would get you to the goal of a flexible work arrangement. Remember, this conversation does not have to be a one-time shot. It may take ongoing conversations with your manager to come to an acceptable solution for both of you.

EXAMPLES OF **FLEX WORK SCENARIOS**

This document is intended to provide staff with examples of how flexible work arrangements might be used, based on specific employee needs. This list is meant to give staff ideas but is not a comprehensive list of types of flexible work arrangements that may be available to you. Staff should keep in mind paid parental leave and FML may be available for use in some of the examples below as well.

Sarah is a non-exempt staff member who serves as an Executive Assistant in the medical center. She recently gave birth to her first child and it is important to her to be able to spend time with her baby. Sarah requested to have a reduction in her schedule. By reducing her FTE she was able to work with her supervisor to create a schedule that allows her to spend more time at home with her child and still meet the expectations of her job.

Fred is an exempt Program Coordinator on the academic campus, and a large part of his workday involves meetings with faculty members and planning programs. He and his partner recently adopted a child, and in addition to using his paid parental leave, he requested some flexibility with work in order to meet the needs of his family. His partner can stay home with their child Monday-Thursday, but it is necessary for Fred to be home with his child on Fridays. Fred arranged a schedule where he works 10 hours a day Monday-Thursday so that he can be home one day a week. Faculty in his department are aware of his schedule, and they arrange meetings and special events to occur Monday-Thursday when Fred is in the office.

Jessica is a non-exempt employee in the medical center who has two middle-school aged children who ride the bus to and from school each day. She has established a flexible schedule with her manager that allows her to work Monday-Friday from 7:30 am-3:00 pm in order to get her kids on and off the bus each day. Jessica takes a 30-minute lunch break instead of an hour to accommodate for the extra 30 minutes per day and can meet the needs of her family and employer.

Paul is an Academic Advisor is taking advantage of the Ohio State tuition benefit to pursue his MBA. Paul has a course that meets during the day, so he requested a flexible work schedule from his supervisor. Paul's supervisor has allowed him to use a flexible schedule and work late two nights a week and continue to meet his job performance goals. Paul uses his Ohio State issued iPad at home to take academic advising appointments via Skype or phone which has been a popular option and benefit for students who have trouble coming in to see an advisor during the typical 8 am-5 pm hours.

Stephanie is a Program Manager in the Medical Center. Her mother suffers from ongoing health issues that require appointments 1-2 times a week for 2-3 hours at a time. Stephanie is her mother's primary caregiver and is responsible for taking her mother to the doctor's office, she is also eligible to use FML to help provide care. Stephanie's manager noticed that she had depleted a large amount of sick time by taking her mother to and from appointments, so she brought up the idea of a flexible work schedule during their most recent meeting. Stephanie's manager presented an option that she could think about organizing her schedule and notify clients so that she may take meetings while in the office and save any appropriate projects or email follow-up for the waiting room during her mother's appointments or at

home later in evening. Stephanie tracks her hours and takes advantage of down-time during her mother's appointments and in the evenings. She and her supervisor check-in bi-weekly to make sure the arrangement is still working for everyone involved and make any necessary adjustments. This schedule has allowed Stephanie to save sick-time for later, while still meeting the expectations of her job and the care-giving needs of her mother.

José is a Service Desk Technician at the Wexner Medical Center. His spouse was being relocated to Virginia for work, so he decided to have a conversation with his manager to see if she would be willing to adjust his work schedule to accommodate this relocation. José's manager was happy to work out an arrangement with him, because she didn't want to lose a talented employee like José who has such a strong and necessary skill set, and she deeply values Jose and his contributions to the work of her team. José and his manager put together a plan that allows him to work from home Monday through Friday using technology, such as Jabber to quickly communicate with members on his team and WebEx video conferencing to participate in various work meetings. He plans to come into the office for at least one week on a quarterly basis in order to connect and engage with his team members face-to-face. José and his manager feel that this accommodation is a win-win situation, since the organization is able to retain top talent and José is able to continue contributing to the work in his department while also being present at home with his spouse.

Physical space is an issue in the IT department that Marcus manages. Many employees are required to share office spaces, and at times, Marcus notices the staff experiencing difficulties in their daily productivity due to distractions and problems rising among the staff when private meetings need to occur. Marcus has presented the option to all employees, whether they are exempt or non-exempt, that they could choose to work from home two days per week, utilizing technology like Skype for Business and University issued iPads and laptops to complete their tasks. Due to the nature of their work, all staff members are required to be available during the "core working hours" of 10am-3pm; however, they are given the flexibility to work any hours outside of this timeframe whenever they choose, whether it be in the morning, afternoon, evening or some combination of these. Staff members that choose this option establish these working hours at the beginning of each semester to ensure that any necessary adjustments are made, and that changes are communicated to clients appropriately.

Alisa works for the IT department and in conjunction with the ADA office, set up a flexible work arrangement to allow her to work from home 5 days a week. Alisa is able to utilize laptops, soft phones and Jabber so that she is accessible to teammates, managers and other support staff. The technology tools allow her to be able to meet both the individual staff needs as well as business needs. Alisa has monthly one on ones with her manager via WebEx video conferencing and attends monthly team meetings via video conference as well.

Bobby is an exempt employee who works on the Data Analytics team for the Wexner Medical Center. A large part of his day-to-day work involves analyzing data and writing reports for his supervisor. Bobby lives about an hour away from campus and spends over 2 hours driving to and from work each day. Bobby has reliably demonstrated his ability to accomplish work tasks in a timely fashion and is both self-sufficient and self-motivated. To better support Bobby's work-life balance, his manager offered up the option for him work from home 3 days per week, using his University issued lap-top computer. He agreed this would be helpful and is able to join any necessary meetings via Skype for Business; however, he is strategic in that he schedules meetings that require his physical presence on Mondays and Fridays when he plans to be in the office. This arrangement has allowed the University to retain a talented staff member like Bobby, while also allowing Bobby the flexibility he needs to better balance his life.

THE OHIO STATE UNIVERSITY

Flexible Work Info Sheet

What is flexible work?

A work arrangement that falls outside of a unit's usual work schedule and lasts longer than two months. Ohio State supports flexible work arrangements to achieve a reliable and productive work environment that enables staff to balance work and personal needs.

Who can use a flexible work arrangement?

All Ohio State staff members are eligible to request flexible work arrangements. However, not all positions lend themselves to flexible work.

How do I know if I am eligible?

Discuss **Ohio State's Policy 6.12 Flexible Work** with your supervisor or your unit's human resources professional.

Where can I get more information?

For employees: Office of Human Resources website at go.osu.edu/flex-work

For managers and units: See go.osu.edu/flex-work-manager

Flexible Work Awareness

An overview prepared jointly by the University Staff Advisory Committee and President and Provost's Council on Women

THE OHIO STATE UNIVERSITY

Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

Both USAC and PPCW advocate for awareness of Ohio State's Flexible Work Policy.

This presentation can be used by unit staff advisory committees and leaders of department staff meetings.

THE OHIO STATE UNIVERSITY

Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

What is Flexible Work?

- A flexible work arrangement falls outside of a unit's usual work schedule and lasts longer than two months.

- Examples of flexible work arrangements include a compressed workweek, telecommuting or starting/ending times that change periodically.

- Flexible work arrangements are fully described in Policy 6.12 Flexible Work.

Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

Why Flexible Work?

Workplace flexibility provides a way to successfully manage people, time, space and workload.

Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

Who can use a flexible work arrangement?

All Ohio State staff members are eligible to request flexible work arrangements. However, not all positions lend themselves to flexible work.

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Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

How do I know if I am eligible?

To determine eligibility and feasibility of a flexible work arrangement for your position, please discuss the policy and specific process information with your supervisor or your unit's human resources professional.

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Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

What is the supervisor's role in flexible work arrangements?

- Per Policy 6.12 Flexible Work, supervisors should look for ways to implement flexible work in their units.

- Flexible work arrangements must be considered regardless of the reason for the request.

- Decision-making processes regarding flexible work arrangements must be transparent.

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Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

Other considerations in Policy 6.12

- Family and medical leave or a reasonable accommodation for a disability may be more appropriate than flexible work.

- Supervisors cannot take adverse action against staff for asking for a flexible work arrangement.

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Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

What are benefits of flexible work policies?

- 95% of companies said employee productivity increased or stayed the same after implementing flexible work arrangements [1]

- 95% of workers with flexible work arrangements said communication with their colleagues improved or stayed the same [2]

- 60% of workers say they're more productive with flexible work arrangements [2]

- 71% of Ohio State staff overall say their unit provides work-life balance. Rates at the college/VP unit level vary from 50% to 95%. [3]

1 Society of Human Resource Management, 2016
2 Flex Strategy Group, 2018
3 Culture Survey, 2014

THE OHIO STATE UNIVERSITY

Flexible Work Awareness
by University Staff Advisory Committee and
President and Provost's Council on Women

Where can I get more information?

For employees:

- Your supervisor or human resources professional

- Office of Human Resources website at go.osu.edu/flex-work

- USAC/PPCW flexible work toolkit at usac.osu.edu

For managers and units:

- See go.osu.edu/flex-work-managers

- Policy consultation with Employee and Labor Relations in the Office of Human Resources, 614-292-2800, email: hr-elr@osu.edu, web: hr.osu.edu/services/elr

Appendix F

Ombudsman Benchmarking

Clemson University (https://www.clemson.edu/administration/ombudsman/**)**

- The Ombuds Office serves as a resource for those who seek guidance on policies, procedures and regulations affecting faculty, graduate students, postdocs, undergraduate students and staff. Ombuds can refer individuals to persons able to resolve problems or handle issues at the lowest possible level. Where appropriate, ombuds can also facilitate communication between parties who find themselves in a dispute.
- All ombuds at Clemson adhere to the Code of Ethics and Standards of Practice of the International Ombudsman Association
- We are not part of any administrative structure at Clemson and refrain from making policy, administrative decisions or conducting formal investigations.
- The only exception to confidentiality to the extent permissible by law, is when an Ombuds determines that there is risk of imminent harm.
- Matters discussed with an ombudsman are considered confidential, "off the record," and do not constitute formal notice of any claims to Clemson University.
- The Ombuds Office is available to faculty members, graduate students, postdocs, undergraduate students and staff who:
  - have a problem or concern relating to the University and need guidance in resolving the issue;
  - need information about policies or procedures at Clemson;
  - think that the University has made an error in a particular case;
  - feel like a victim of harassment or discrimination;
  - are unsure about which University policies, procedures or regulations apply to certain situations;
  - have a problem that cannot be resolved by following regular University procedures;
  - believe that he/she has been unfairly or inequitably treated;
  - have a problem that requires someone to help negotiate a solution or facilitate communication between parties;
  - believe that a University policy, procedure or regulation has been applied unfairly or erroneously.
- The Ombuds Office provides a confidential, informal, neutral, fair and impartial place for faculty members, graduate students, postdocs, undergraduate students and staff to discuss their concerns. Ombuds can assist with:
  - addressing problems and concerns, identifying and evaluating options to reach resolutions;
  - providing available resources within the University that might be of assistance;
  - serving as a neutral party in conflict resolution;
  - opening lines of communication through shuttle diplomacy;
  - recommending changes in University policies and procedures when appropriate.
- https://newsstand.clemson.edu/the-significant-work-of-clemsons-ombuds-and-october-events/
  - Gordon Halfacre has been the ombuds for faculty and students since the position started at Clemson in 1998.
  - The average visit to the Ombuds Office lasts more than an hour and a half.

Ombudsman Benchmarking

- Job description: https://ombuds-blog.blogspot.com/2018/03/job-posting-clemson-university.html

University of Pittsburgh (https://www.asgraduate.pitt.edu/student-life/ombudsperson)

- Position for graduate students
- The Ombudsperson for graduate students in the Dietrich School is Philippa Carter, who also serves as Director of Diversity Initiatives and Academic Affairs.
- https://www.provost.pitt.edu/school-ombuds
  - They have a by school ombudsperson for graduate and post docs
- Office of the Provost

University of North Carolina at Chapel Hill (https://ombuds.unc.edu/)

- The University Ombuds Office is a safe place where all Carolina staff, faculty, students and administrators are welcome to come and talk in confidence about any campus issue, problem, or dispute. Our office supplements, but does not replace, the University's formal channels, such as the grievance policy.
- We also identify trends and challenges and can make recommendations for change in University policy or practice when appropriate. However, we are not decision makers. We do not have the power to establish, change, or set aside any University rules, policies, or management decisions.
- Dawn Osborne-Adams, University Ombuds, Director
- Laurie Mesibov, Associate University Ombuds
- Victoria Dowd, Assistant University Ombuds, Program Specialist
- Joshua Canzona
- Serves staff, faculty, students, and administrators
- The University of North Carolina at Chapel Hill's ombuds officers follow the ethical guidelines and standards of practice of The International Ombudsman Association.

University of North Carolina at Charlotte (https://ombuds.uncc.edu/)

- Faculty Ombuds Office
- The UNC Charlotte Faculty Ombuds Office was established in the Spring of 2012 to provide an alternative resource for the management, prevention and resolution of conflicts arising among the faculty and administration of the University.
- The organizational Ombuds is a designated neutral who is appointed or employed by an organization to facilitate the informal resolution of concerns of employees, managers, students, and, sometimes, external clients of the organization.1
- The Ombuds and Associate Ombuds are full-time senior faculty members at UNC Charlotte. Both teach, conduct research, and serve the university community in addition to their Ombuds duties. Neither serves on a departmental or college Review Committee nor the University Hearing or University Grievance Committee.
- Beginning July 1, 2019, informal mediation by trained UNC Charlotte faculty is available to help resolve faculty disputes.
- The Ombuds provides service to currently employed full-time faculty and administrators holding faculty rank.

- The Faculty Ombuds and Associate Faculty Ombuds will be tenured members of the faculty who have either undergone formal training through the IOA or will undergo such training as soon as practicable. The Faculty Ombuds and Associate Faculty Ombuds must participate in continuing professional education during his or her term of office. As a minimum, those selected as the Faculty Ombuds and Associate Faculty Ombuds should have good listening and communication skills, be fair-minded, diplomatic, comfortable speaking to people with varying backgrounds, and sensitive to issues of diversity. The Faculty Ombuds and Associate Faculty Ombuds cannot be from the same college.
- The Faculty Ombuds and Associate Faculty Ombuds will each serve three-year terms. Terms are renewable once for a maximum of six consecutive years of service. The Faculty Ombuds position will require a commitment of 50% effort during the academic year. Although most faculty are on ninemonth contracts, conflicts requiring resolution may require attention during the summer months. To accommodate the need for access during the summer, a stipend will be provided for the Faculty Ombuds. The Associate Faculty Ombuds position will require a commitment of 25% effort during the academic year

University of Houston

- The Office of Ombuds Services provides the University of Houston faculty and staff with an informal mechanism for resolving workplace conflicts and addressing questions and concerns related to their employment with the University.
- Not much info on the website; I think the ombudsperson is full time

Texas A&M

- Based in the Office of the Associate Provost for Undergraduate Studies, the Undergraduate Ombuds assists students, faculty, staff, and administrators with resolving academic conflicts for undergraduates on an informal and confidential basis.
- It seems to be the Assistant Provost for Undergraduate Studies
- The Ombuds Officer advocates for the fair processes of graduate education and provides equal, open access to all parties: graduate and professional students, staff, faculty, and administrators.
- The Faculty Ombuds Officer serves as an independent, confidential, and impartial resource for faculty.
- It looks like the college of Engineering has their own staff ombuds with very little info
- There is a faculty and staff ombudsperson who serves the College of Medicine since 2018

University of Florida (https://www.ombuds.ufl.edu/)

- The purpose of the Ombuds office is to assist students, staff, and faculty in resolving problems and conflicts that arise in the course of interacting with the University of Florida.

University of Arizona (https://ombuds.arizona.edu/)

- Serve: All levels of UA employees and students, in all UA units and colleges, as well as others who have a university-related concern.
- Our services are available to all UA units and colleges, regardless of location. This includes UA North Campus, UA South, all Arizona Health Sciences units (including the College of Medicine -

Phoenix, College of Nursing - Phoenix, and other Phoenix campuses), all cooperative extension units, and others.

- We serve parents/family of UA students when they have a concern, question, etc. related to the student, or some other university-related concern. The information we can provide about students is limited based on the Family Educational Rights and Privacy Act (FERPA).
- We provide services to other individuals who have a university-related concern. This can include parents/family of UA students, partners/family of UA employees, prospective students or employees, former students or employees, patients of the medical centers, university neighbors, and others.
- The Ombuds at the colleges of medicine are not currently affiliated with the Ombuds Office. Ombuds Office services are available to all UA units and colleges, including both colleges of medicine. This includes all levels of students and employees, as well as others who may have a university-related concern (patients, etc.).
- Positions
  - Director
  - Administrative Associate
- The Ombuds Office is structurally located in the Office of the Provost. While the Director of the Office of the Ombuds reports to the Senior Vice President for Academic Affairs and Provost, the office functions independently of university administration. In accordance with Ombuds ethics and standards of practice, only non-identifying statistical information and trends are reported, which help to inform positive change efforts including improvements to university policies and practices.
- How is the Ombuds Office different from going to my supervisor, Human Resources, or the Office of Institutional Equity?

  - Our level of confidentiality, informality, impartiality, and independence; our services; our approach; and our ability to work on many levels within the university distinguish our role form other resources. The Ombuds Office can help you work through a wide variety of issues, concerns, questions, conflicts, and challenges. We help with situations from small and simple to large and complex, and work on the individual, group, departmental, organizational, and systemic levels. We provide consultation, coaching, mediation/facilitation, training, and organizational development. In addition, we have a library of books available for check out on topics related to effective communication, collaboration, and conflict management. We can assist you with difficulties between supervisors and employees, challenges with colleagues, workplace climate issues, career progression concerns, and much more. Please see our Overview page and Ombuds Office Services pages for more information on how we can help.
  - Line management, Human Resources, the Office of Institutional Equity, and internal audit procedures are, for the most part, formal channels. They are offices of record that conduct formal investigations, make written findings, recommendations, and decisions, and set policies. Human Resources also offers informal services, including Employee Advising, Life & Work Connections, and Professional Development. If you want to initiate a formal complaint, or you wish to have your concerns documented, you must

go through a formal channel. If you want to have a confidential, off-the-record conversation with a neutral party, contact the Ombuds Office. If you aren't sure where to start feel free to contact us and we can help you explore your options and connect to resources.

UCLA (http://www.ombuds.ucla.edu/**)**

- The Office of Ombuds Services is a place where members of the UCLA community–students, faculty, staff and administrators–can go for assistance in resolving conflicts, disputes or complaints on an informal basis.
- Staffing
    - Director and Campus Ombudsperson

Date: April 7, 2021

From: Ohio State University Voting Staff Senators

             Alex Thomas (2020-2022 term)
             Andrew Jordan (2020-2022 term)
             Courtney Sanders (2020-2022 term)
             Lisa Mayhugh (2019-2021 term)
             Tom Gessells (2019-2021 term)

        Ohio State University Staff Senator Alternates

             Megan Hasting
             Wil Turner

To: Chrissy Sprouse, USAC Chair
        Steven Loborec, USAC Chair-Elect

Subject: Staff Senator Update for University Staff Advisory Committee's Annual Report

<u>Continuing a Historic Year</u>

The 2019-2020 academic year marked a historic year in the university's 151-year history as voting staff senators were added to the university shared governance structure. Ohio State's University Senate now includes five voting staff senators, along with faculty, students, and administrators. With the inclusion of staff, Ohio State is now a leader in shared governance amongst peer institutions.

As a result of these changes, the staff perspective is considered, and even influences, the work of University Senate. The role of the staff senator includes:

- Developing working relationships with other senators
- Attending and voting in all Senate meetings
- Participating in Senate committees to which one is assigned
- Staying informed and updated regarding major campus issues, specifically related to, or impacting staff
- Advocating for the interests of staff constituents and advocating for staff in University Senate
- Sharing updates on key Senate initiatives, projects, and other relevant information with USAC

As the Staff Senator role evolves, future tasks may include:

- Providing communication regarding senate priorities to staff across university units (i.e. promoting Culture and Values survey engagement)
- Raising questions from staff at Senate meetings
- Engaging with USAC on monthly calls to be informed of USAC issues and initiatives

- Further engaging with senate committees and partnering with fellow staff members who sit on senate committees

2020-2021 Areas of Focus

Traditionally, the work of the senate pauses during the summer. As an important governing body, this year senate continued to work throughout the summer to ensure the university was informed and prepared for the transition of university leadership and respond to the COVID19 pandemic. Special senate meetings were held in May, June, and July, to discuss, plan for, and address the growing concerns of the university community related to these issues.

In addition to the concerns facing Ohio State, the country was responding to multiple issues of racism and social injustice. The senate engaged in conversations and educational presentations about equity, social justice, and racism.

Overall, the work of the senate has been focused on supporting students and their academic success during a challenging time. University leaders gave well-being and anti-racism presentations to inform senate of the challenges facing students, faculty, and staff. University Senate voted on and passed multiple rule changes, related to grading and academic support (Pass/No Pass, deadline extensions) with the objective of providing additional support for students.

The following link provides voting items, presentations, and the corresponding meeting dates at which the votes occurred. A comprehensive record of all senate meetings can be found at: senate.osu.edu/senate-meetings-archive.

Ad Hoc Committee Work – Senate Composition

Earlier this academic year, the University Senate Steering Committee voted to assemble an Ad Hoc committee to review and suggest improvements to the current University Senate standing committees.

The scope of this Ad Hoc committee includes the structure, operation, and effectiveness of the 19 senate committees. It may consider whether the current practices of committees align with the duties and responsibilities described in rules and bylaws. It may also consider alignment with the priorities and needs of the university, and if new committee structures can fill those priorities and needs.

The goal of this Ad Hoc committee is to generate specific recommendations for improving the fit of the senate committees with the operations of the university. The committee has been made up of 11 members representing faculty, administration, students, and staff. One of the 11 members on this Ad Hoc committee is a staff member. This staff member is also a Staff Senator. The Steering Committee has designated a deadline for the final committee report of no later than April 15, 2021.

The Ad Hoc committee has developed, distributed, and collected survey feedback from all constituency groups on the effectiveness of each senate committee. This survey data, along with experience from the Ad Hoc committee members, is being used to develop recommendations. To further analyze survey results and develop recommendations, the Ad Hoc committee was broken up into four sub-committees, which include the following:

1. University subcommittee, which includes Athletic Council, Physical Environment (COPE), Diversity Committee, Distance Education, Libraries and Information Technology (DELIT), Steering Committee, Evaluation of Central Administrators (EOCA)
2. Fiscal subcommittee, which includes Fiscal, Faculty Compensation and Benefits (FCBC), Graduate Associate Compensation and Benefits, Intellectual Property, Patents and Copyrights (IPPC)
3. Faculty subcommittee, which includes Academic Freedom and Responsibility (CAFR), Faculty Hearing, Honorary Degrees, Rules Committee
4. Academic subcommittee, which this includes Academic Affairs (CAA), Student Affairs (CSA), Enrollment and Student Progress (CESP), Academic Misconduct (COAM), Research (URC)

Recommendations that impact staff are being carefully considered. The objective is to make sure our recommendations are strategic in nature and only advocate for additional staff or time on committees where it made sense to do so.

As of the time of this report, final recommendations to University Senate Steering committee have not been submitted. The next steps in the process would be to finalize the Ad Hoc recommendations, submit to Steering, a passing vote in Senate and possibly obtain Board of Trustee approval.

Next Steps

Staff senators have and will continue to work on full integration into University Senate. The purpose, responsibilities, and impact will continue to evolve as the university emerges from the global pandemic. Staff senators will engage the staff community through close collaboration with USAC, senate subcommittees, and the University Senate body. For the remainder of this year, senators will work to accomplish or make progress on the initiatives listed above. Objectives for next year have not been identified at this time.

2020 REPORT

STAFF CAREER DEVELOPMENT GRANT ANALYSIS

THE OHIO STATE UNIVERSITY
HUMAN RESOURCES
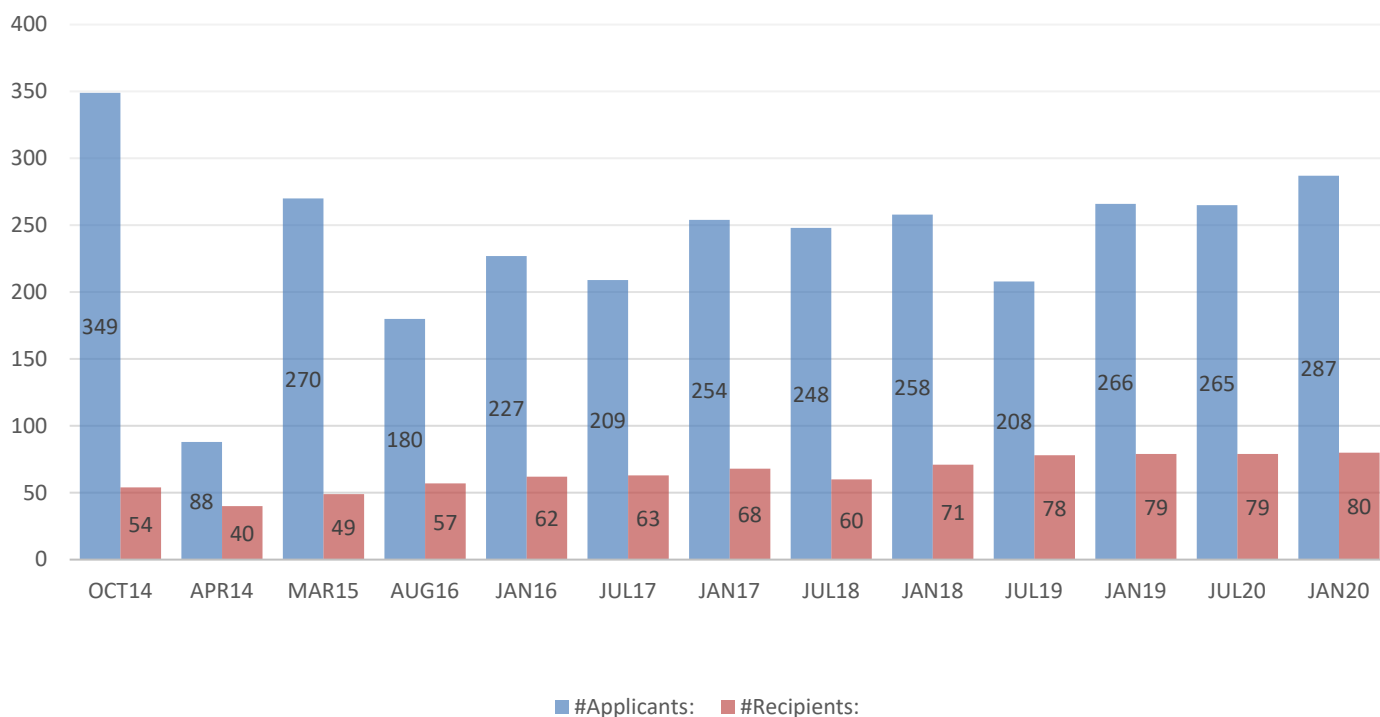
Staff Career Development Grant
2020
Background

The Staff Career Development Grant provides staff with an opportunity to further their growth and development. Prior to July 2018 (JUL19 grant season), eligible staff could apply for a Staff Career Development Grant of up to $1,000 for individuals and $1,500 for groups. Grants can be used for professional development, education or training costs related to job and/or career goals.
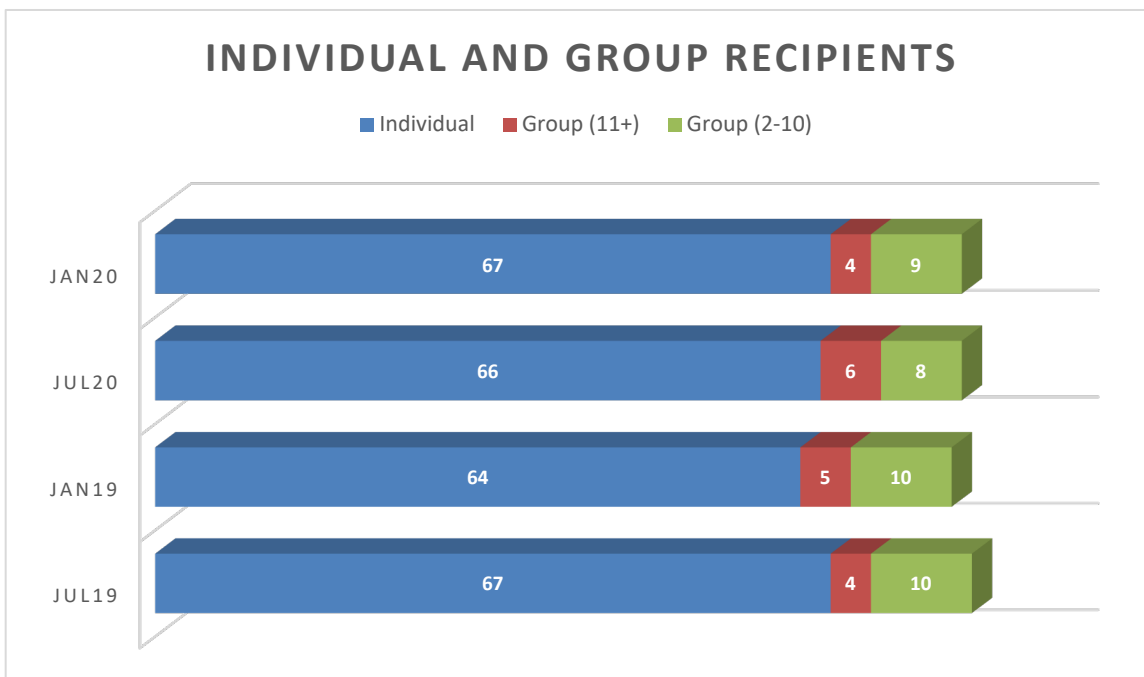
Amounts available for individuals and groups increased in July 2018 (JUL19 grant season) to provide greater development opportunities. Eligible staff can apply for a Staff Career Development Grant of up to $1,250 for individuals, $1,750 for groups of 2-10 and $2,000 for groups of 11 or more. During the July 2019 grant season, we awarded eight grants for groups of 2-10 and three grants for groups of 11 or more. Increasing the funding for the group grants provides a greater opportunity for units and departments to provide professional development to more of their team members.

Since October 2013 (FY 2014), **3,109** applications have been received for the staff career development grants. **840** staff career development grants have been awarded, totaling **$882,322.57.**

STAFF CAREER DEVELOPMENT GRANTS

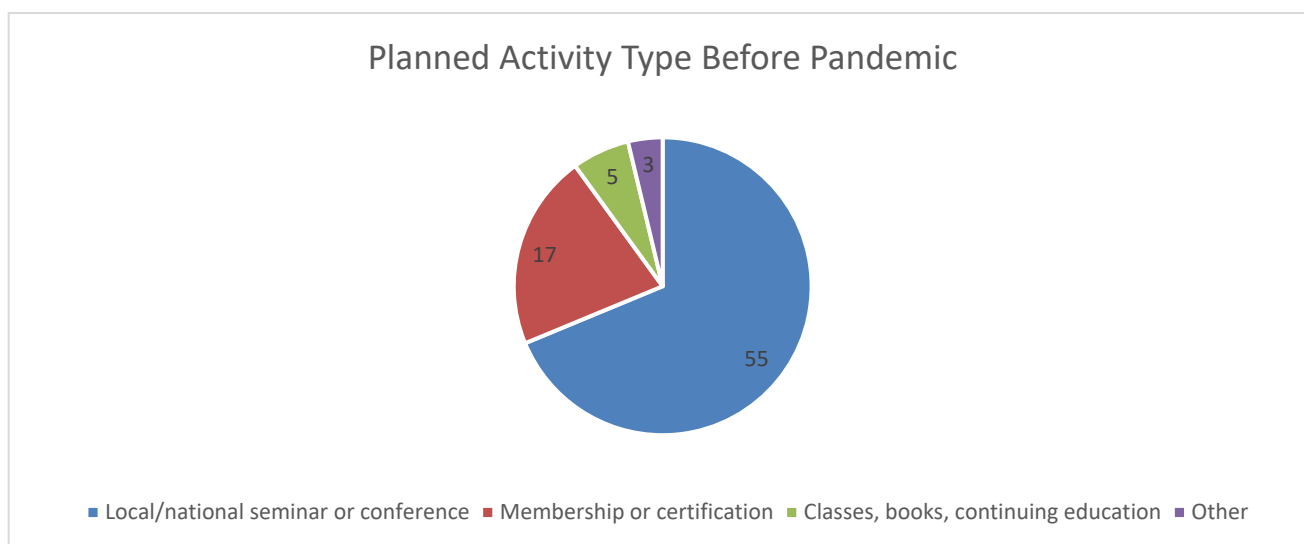| Period	#Applicants:	#Recipients:
OCT14	349	54
APR14	88	40
MAR15	270	49
AUG16	180	57
JAN16	227	62
JUL17	209	63
JAN17	254	68
JUL18	248	60
JAN18	258	71
JUL19	208	78
JAN19	266	79
JUL20	265	79
JAN20	287	80

The tiered funding approach which began in July 2018 (July 19 grant season) has been an attractive offering for group applicants.

INDIVIDUAL AND GROUP RECIPIENTS

Individual ■ Group (11+) ■ Group (2-10)

| Season	Individual	Group (11+)	Group (2-10)
JAN20	67	4	9
JUL20	66	6	8
JAN19	64	5	10
JUL19	67	4	10

COVID-19 Impact

In response to the COVID-19 pandemic, the university declared a state of emergency and placed restrictions on travel. As of June 20, 2020, the university has required that all travel that has been scheduled through December 31, 2020, must be cancelled. **52** out of **80** recipients requested funds for travel expenses related to their professional development activity.

Planned Activity Type Before Pandemic

Activity Type	Count
Local/national seminar or conference	55
Membership or certification	17
Classes, books, continuing education	5
Other	3

All grant recipients impacted by COVID-19 were sent a survey and asked to select from the following options regarding their JAN20 SCDG:

- Request a Grant Extension
- Request a Grant Reallocation
- Forfeit Funds
- No Change Needed

Currently, 47 of the 80 JAN20 recipients have responded to the survey…

COVID-19 Impact

- Forfeit Funds ■ No Change ■ Extension ■ Reallocation
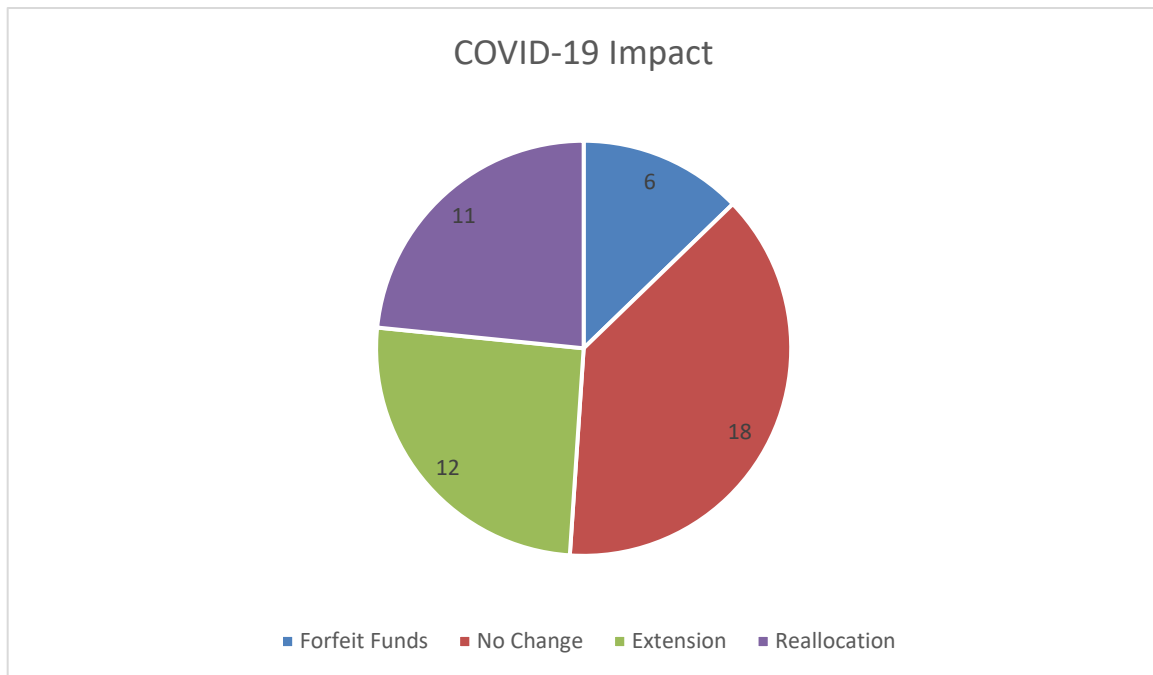
To date, over $6500 has been forfeited due to the impact of COVID-19. Of the 33 recipients who have yet to respond, 23 of those requested funds for travel expenses related to their professional development activity and will most likely need to request a change. Additional communications will be sent to ensure everyone who needs to request a change has an opportunity to do so.

Staff Manager Development Grant

2020

Background

The staff manager development grant provides financial support to assist staff managers seeking to sharpen management skills, encourage participation in activities that further professional development and enhance behaviors that support the university's values.
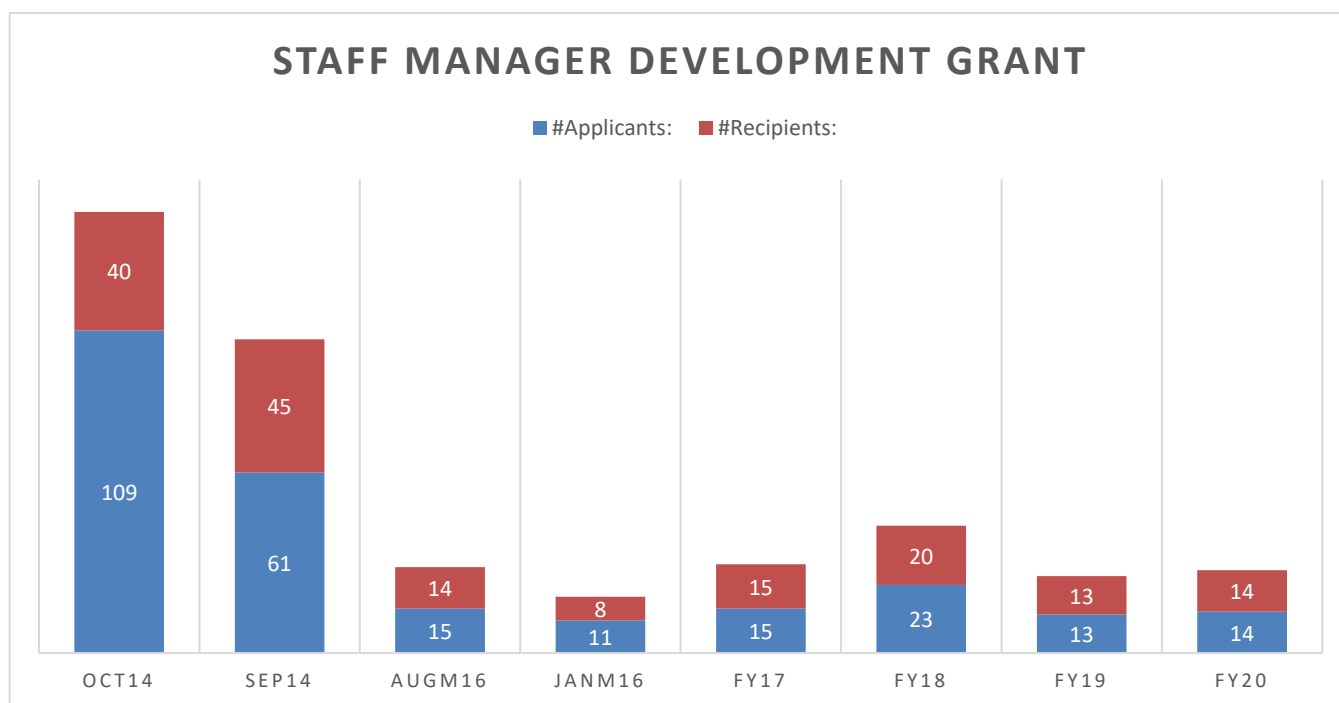
Grants of up to $1,000 for individuals are awarded for staff manager participation in management workshops and programs, seminars, conferences or other activities held at The Ohio State University.

Beginning in January 2016, we opened the grant process to accept manager grants throughout the year. Two years later in 2018, a proposal was submitted to the President and Provost for both the staff career development grant and the manager development grant and was approved. Recommendations included:

- Increase disbursement for individual application from $1000 to $1250
- Incentivize group applications using a tiered funding model
  - 2-10 employees ($1750)
  - 11 or more employees ($2500)
- Provide additional manager development opportunities by permitting managers to use the manager grant funds for coaching services.

The first two bullets were implemented for the Staff Career Development grant in July 2018 (JUL19 grant season).

STAFF MANAGER DEVELOPMENT GRANT

■ #Applicants: ■ #Recipients:

	OCT14	SEP14	AUGM16	JANM16	FY17	FY18	FY19	FY20
#Applicants:	109	61	15	11	15	23	13	14
#Recipients:	40	45	14	8	15	20	13	14

Coaching Services Program

New in 2020, the Coaching Services Program, which is an established leadership program rooted in our community and aligned with our culture will offer a virtual coaching platform designed to develop managers and enhance their leadership skills at any stage of their career. Ohio State managers work with their supervisor to identify an area of focus for the coaching engagement and the coaching sessions are designed around an associated action plan to achieve results. Those interested in coaching will be able to apply for a **Manager Development Grant** to cover the cost of **up to $1250.** *Great leadership matters* and coaching is a highly effective way to strengthen managers through increased awareness, expansion of knowledge, and an opportunity to practice leadership skills throughout the coaching engagement.

The Tier 1 Coaching Services Program offers 6 virtual coaching sessions for $1,250 which includes access to online leadership development tools and resources.

$100,000 has been earmarked for Coaching Services for FY2021. We have worked with the coaching services team to develop an intake and screening process for the manager grant. The Coaching Services Program is in progress and we look forward to awarding our first grant recipient soon.

Staff Development Grants
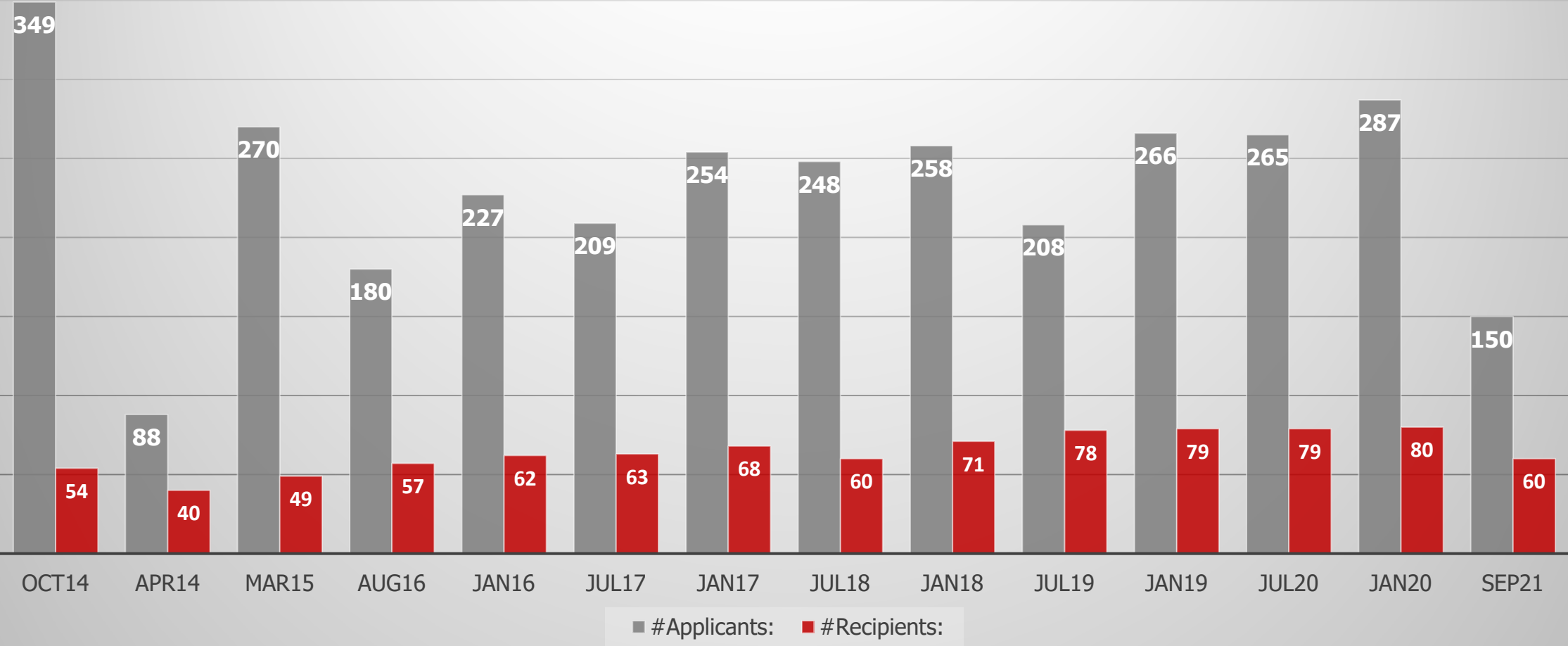FY 2020/2021

Staff Career Development Grants

Since October 2013 (FY 2014), **3,259** applications have been received for the staff career development grants. **900** staff career development grants have been awarded, totaling **$941,607.66**.

Staff Career Development Grants

	#Applicants:	#Recipients:
OCT14	349	54
APR14	88	40
MAR15	270	49
AUG16	180	57
JAN16	227	62
JUL17	209	63
JAN17	254	68
JUL18	248	60
JAN18	258	71
JUL19	208	78
JAN19	266	79
JUL20	265	79
JAN20	287	80
SEP21	150	60
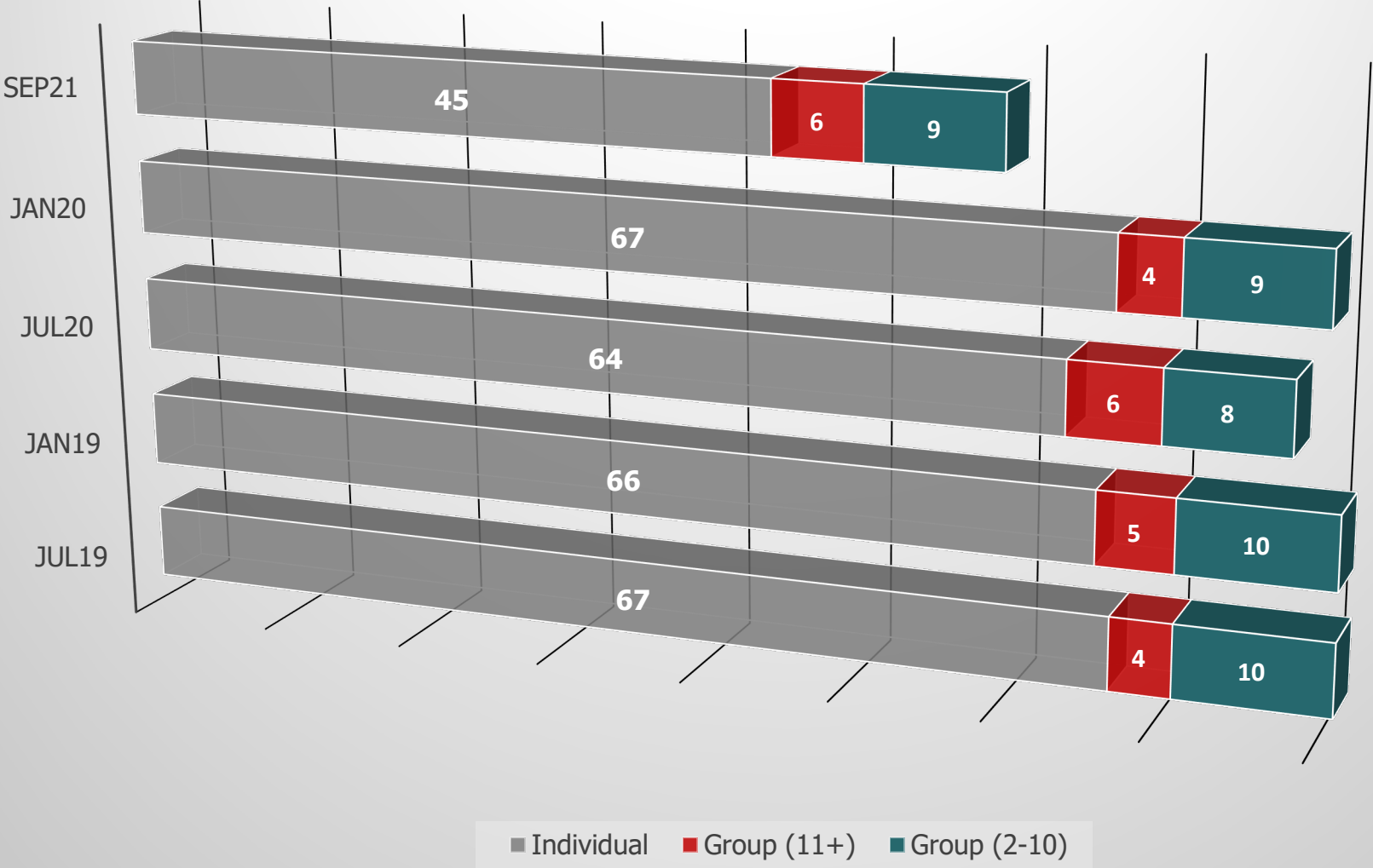
COVID-19 Impact

Since travel and registration for conferences and seminars are the most requested use of funds, we have seen a significant impact due to COVID. The majority of our JAN20 (FY) grant season recipients were impacted and many extensions of deadlines and reallocations were granted. For our SEP21 (FY) grant season we saw a decrease in the number of applicants, recipients, and funds awarded with an obvious decrease in funding planned/spent on travel.

The university has allocated $150,000 per year for staff development grants. In 2018, the university granted an increase of $50,000 per year. However, due to COVID and the amount of unused (but allocated) funds remaining, the university did not give the additional $50,000 for FY20 nor is it planned for FY21.

Here is a snapshot of data on the number of applicants, recipients, funds awarded, use of funds, and exceptions made due to COVID. Included is the JUL20 (FY) grant season as a reference for a typical non-COVID season.

Grant Season (FY)	JUL20	JAN20	SEP21
# of Applicants	265	287	150
# of Recipients	79	80	60
Total Funds Awarded	$96,668.31	$96,460.39	$59,285.09
Use of Funds:			
Classes, books, continuing education	17%	14%	32%
Local/national seminar or conference	59%	64%	20%
Membership or Certification	18%	21%	42%
Other (expenses toward professional dev.)	6%	1%	7%
% of Recipients Requesting Funds for Travel	54%	65%	2%
COVID Impact as of February 1, 2021:	Non-COVID		
Extensions	4	16	2
Forfeits	6	6	2
No Change	69	17	5
Reallocations	0	10	0
Impact To Be Determined	0	31	51

MAR21 Dates

- **Application submission: Begins Monday, March 1, 2021**

- **Application Deadline: Wednesday, March 31, 2021**

- **Funding Period: May 2021 – September 2021**

- **Application materials uploaded to box and to USAC by Wednesday, April 7, 2021 at start of business**

- **Application review period – Friday, April 9, 2021 – Monday, April 26, 2021 (that gives them 3 weekends to review)**

- **Final numbers due to HR: Wednesday, April 28, 2021 EOB**

- **Distribution of grant money: TBD, 4/28, 29, 30**

- **Notification of awards: Friday, May 7, 2021**
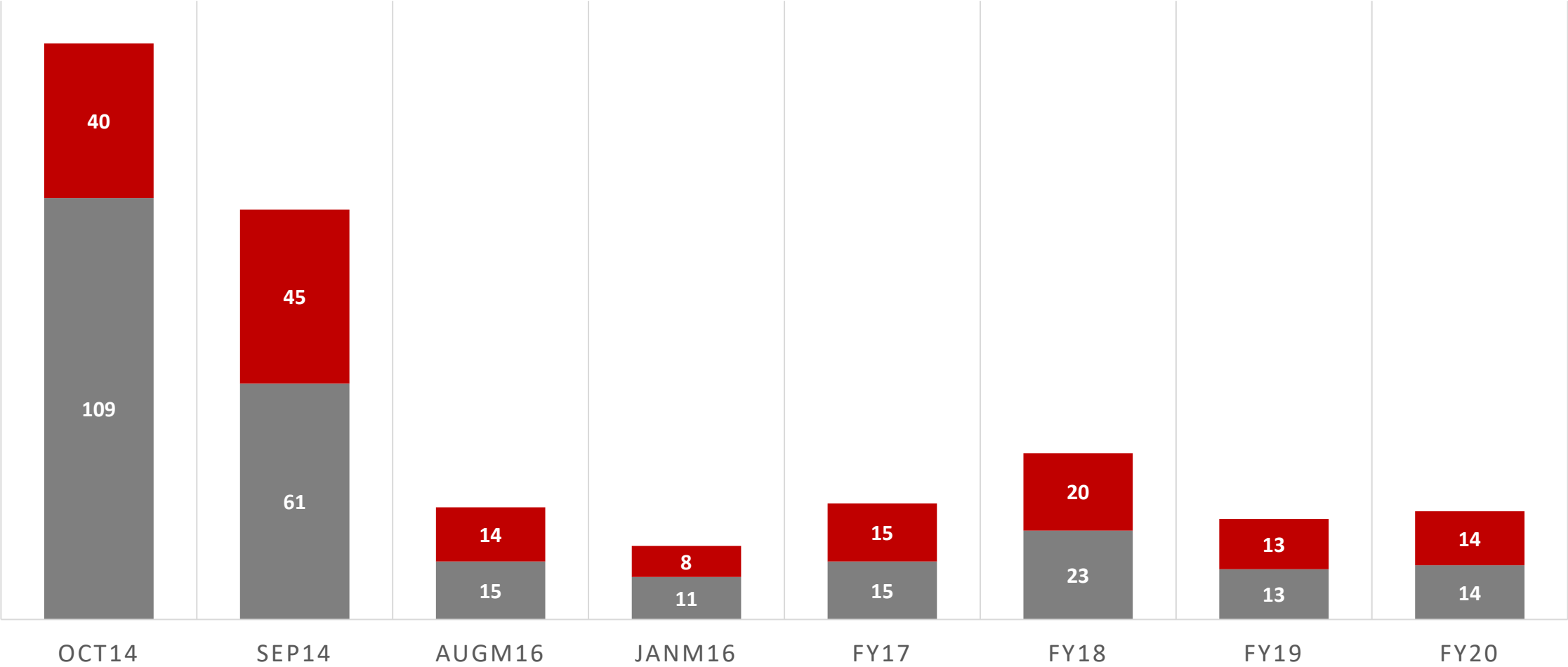
Staff Manager Development Grants

The staff manager development grant provides financial support to assist staff managers seeking to sharpen management skills, encourage participation in activities that further professional development and enhance behaviors that support the university's values.

STAFF MANAGER DEVELOPMENT GRANT

Coaching Services Program

New in 2020, the Coaching Services Program, which is an established leadership program rooted in our community and aligned with our culture will offer a virtual coaching platform designed to develop managers and enhance their leadership skills at any stage of their career.
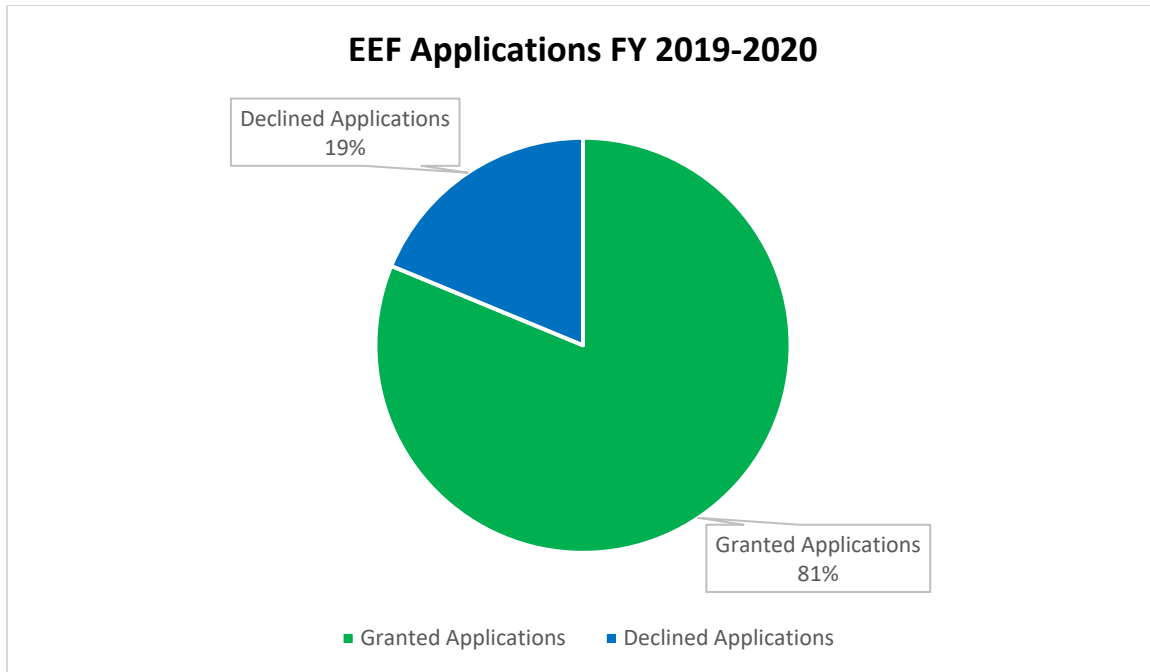
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$100,000 has been earmarked for Coaching Services for FY2021. We have worked with the coaching services team to develop an intake and screening process for the manager grant. The Coaching Services Program is in progress and we look forward to awarding our first grant recipient soon.

Appendix J

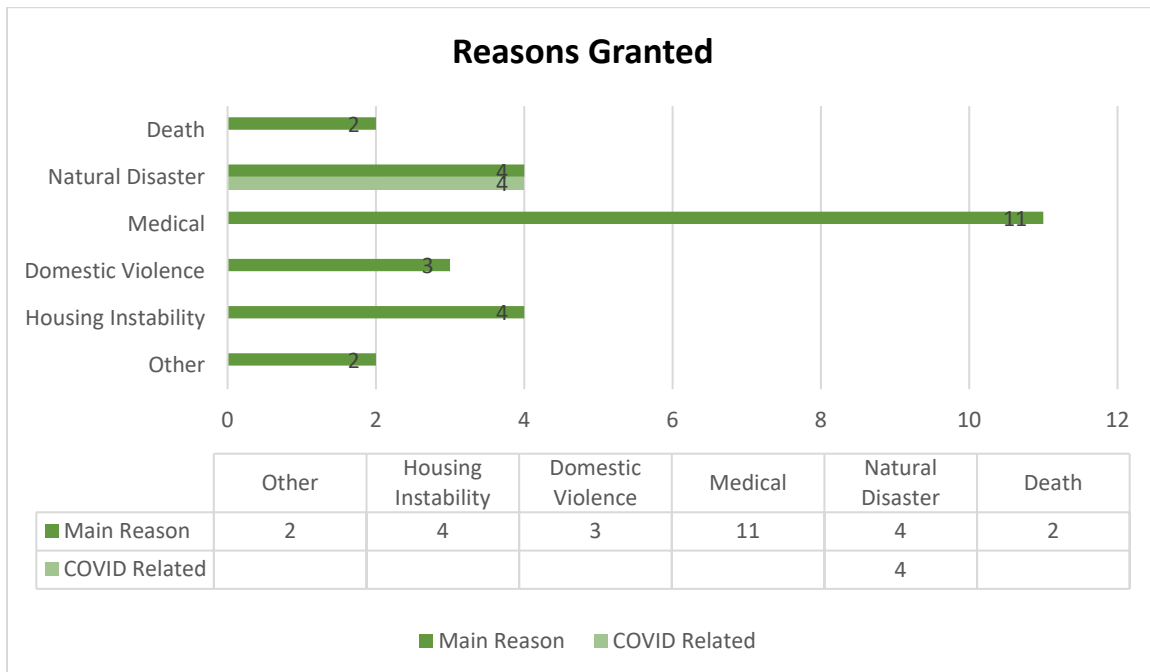**Employee Emergency Fund Application Report Fiscal Year 2019-2020**

EEF Applications FY 2019-2020

Declined Applications
19%

Granted Applications
81%

■ Granted Applications   ■ Declined Applications

EEF Applications from Fiscal Year 2019-2020 (7/1/19 to 7/1/20)
Total Completed Applications: 32
Granted: 26
Declined: 6

Reasons Granted

Death 2
Natural Disaster 4 / 4
Medical 11
Domestic Violence 3
Housing Instability 4
Other 2

0   2   4   6   8   10   12

	Other	Housing Instability	Domestic Violence	Medical	Natural Disaster	Death
■Main Reason	2	4	3	11	4	2
■COVID Related					4	

■ Main Reason   ■ COVID Related

Employee Emergency Fund Application Report Mid-Fiscal Year 2020-2021

EEF Applications MID FY 2020-2021

Declined Applications
29%

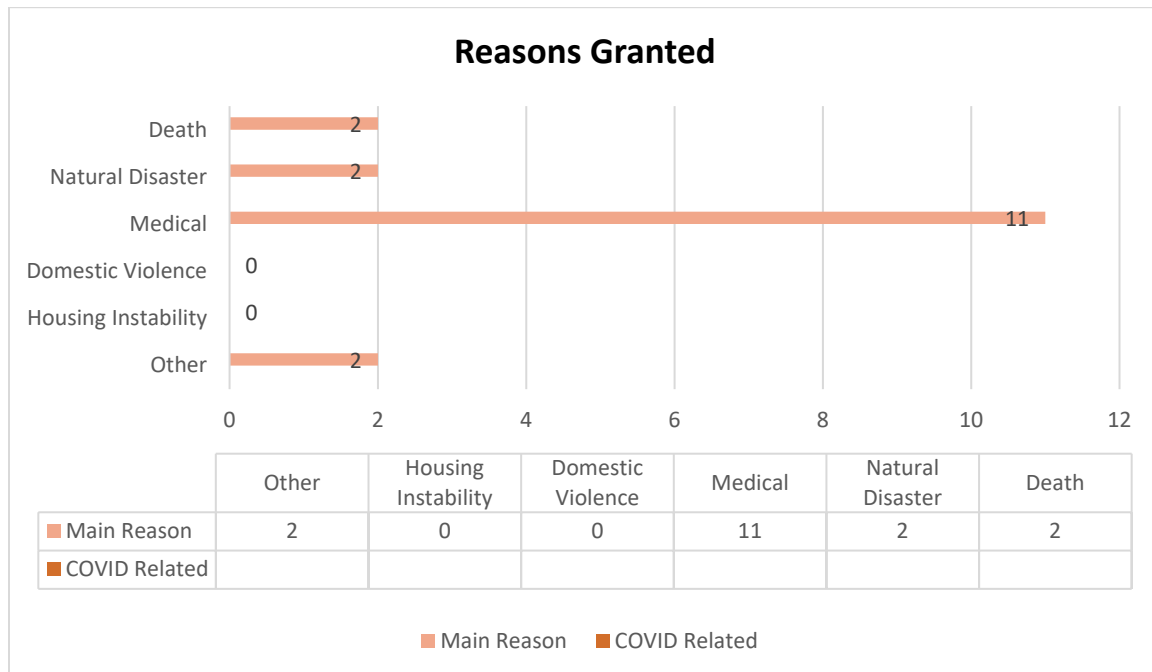Granted Applications
71%

■ Granted Applications   ■ Declined Applications
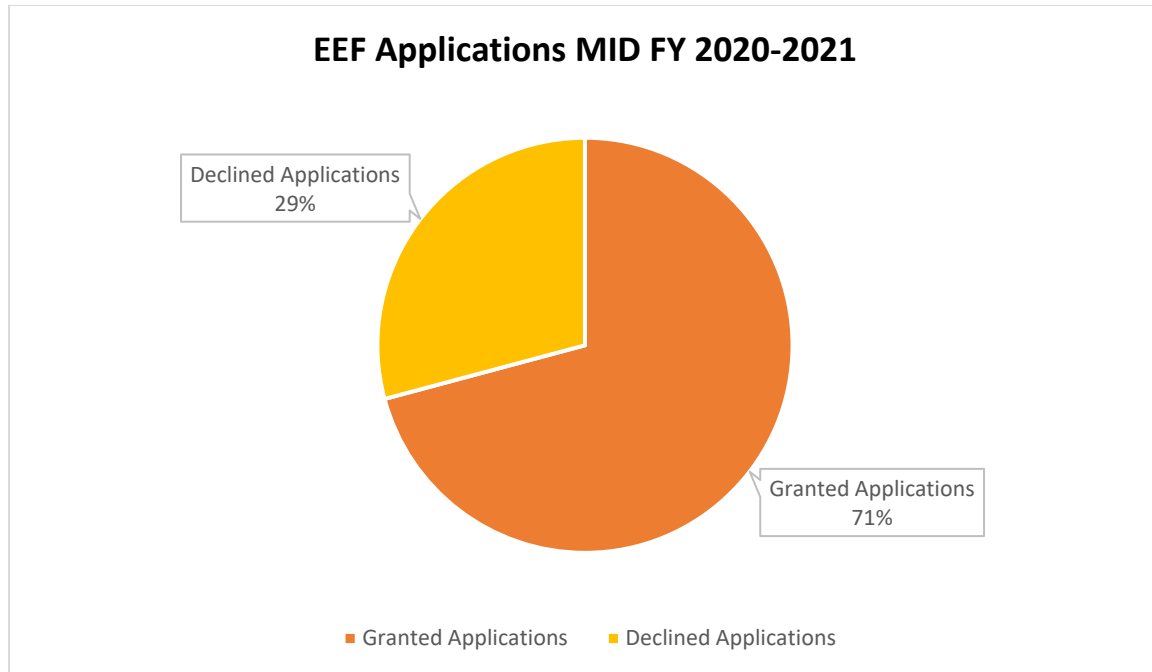
EEF Applications from Mid-Fiscal Year 2020-2021 (7/1/20 to 12/31/20)
Total Completed Applications: 24
Granted: 17
Declined: 7

Reasons Granted

Death — 2
Natural Disaster — 2
Medical — 11
Domestic Violence — 0
Housing Instability — 0
Other — 2

(axis: 0, 2, 4, 6, 8, 10, 12)

	Other	Housing Instability	Domestic Violence	Medical	Natural Disaster	Death
■ Main Reason	2	0	0	11	2	2
■ COVID Related						

■ Main Reason   ■ COVID Related

Historical USAC Application Review
2015-2020

Overview

USAC's Inclusive Excellence subcommittee reviewed membership applications from the last five years to gain a better understanding of the applicant pool. This analysis will help USAC understand the backgrounds of applicants and inform recruitment strategies for the upcoming year to ensure diversity and representation amongst the staff population at Ohio State.

Applicant Numbers

2015-2016: 25

2016-2017: 23

2017-2018: 18

2018-2019: 19

2019-2020: 12

97 applicants in the past 5 years

5-Year Average: 19.4 applicants (per year)

Applicant number decreasing since 2015

Years of Service

Most applicants have <5 YOS
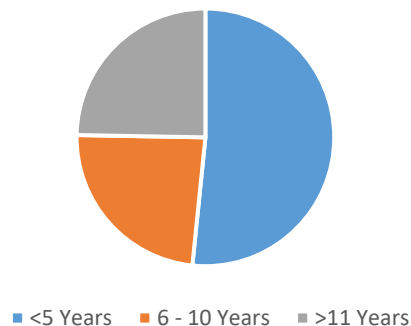
Average: 7.59

Range: <1 to 35

4.1% (4) did not indicate YOS

<5 YOS: 49.5% (2^+ and 4^+ most often)

6-10 YOS: 22.7%

11+ YOS: 23.7% (**20+:** 4.1%)

Unknown: 4.1%

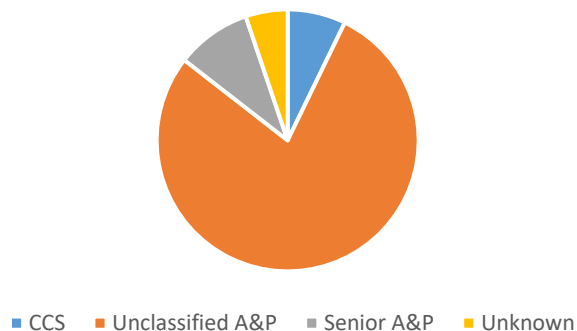■ <5 Years   ■ 6 - 10 Years   ■ >11 Years

Appointment Type

78.4% applicants identify as Unclassified A&P

7.2% applicants identify as Classified Civil Service

9.3% applicants identify as Senior A&P

5.2% applicants did not respond

   1 applicant indicated "Exempt Professional & Technical"

■ CCS   ■ Unclassified A&P   ■ Senior A&P   ■ Unknown

Campus

95.9% applicants from Columbus campus

4.1% applicants from regional campus (4 total)

On average, 1 regional campus applicant per year

Zero applicants from Marion or ATI-Wooster in last 5 years

Historical USAC Application Review
2015-2020

Administration and Planning / FOD

Business and Finance (2)
   Corporate Engagement Office

College of Arts and Sciences (3)
   Psychology, Dept. of Political Science, Dept. of Arts Admin., Education, and Policy

College of Dentistry

College of Education and Human Ecology (3)
   Office of Educator Preparation, Dept. of Teaching & Learning, Dept. of Human Sciences

College of Engineering (3)

College of Food, Agricultural, and Environmental Sciences

College of Medicine (7)
   Internal Medicine, Hematology, Obstetrics & Gynecology

College of Nursing (2)

College of Optometry

College of Pharmacy

College of Public Health (3)

College of Veterinary Medicine (2)

Department of Public Safety

Economic & Corporate Engagement/Technology Commercialization Office

Fisher College of Business (5)
   Office of Diversity & Inclusion Student Services

John Glenn College of Public Affairs

Lima Campus
   Enrollment Services

Mansfield Campus

Mershon Center for International Security Studies

Moritz College of Law (2)

Newark Campus (2)
   Academic Affairs, Education Department

Office of Academic Affairs (5)
   University Libraries (2), Office of Responsible Research Practices

Office of the Chief Information Officer (2)

Office of Distance Education and eLearning (2)

Office of Health Sciences / Center for Clinical and Translational Science

Office of Human Resources (4)

Office of International Affairs
   Center for Latin American Studies

Office of Legal Affairs / Office of Compliance and Integrity

Office of Student Academic Success (5)
   Undergraduate Admissions, Grad./Prof. Admissions, Student Athlete Support Services

OSU Health Plan
   IT

Sports Medicine

Historical USAC Application Review
2015-2020

Strategy Management Office
Student Life (13)
Dept. of Rec. Sports (5), Residence Life (3), Multicultural Center, Counseling & Consultation Services
University Advancement/OSU Foundation (2)
Advancement Records
University Hospitals
Wexner Medical Center (12)
Human Resources (2), Comprehensive Cancer Center (2) IT (2), Pharmacy, Nuclear Medicine
Supply Chain Operations, Rehab Services – Acute Care, Nisonger Center

ERG Conversations

Overview

In winter 2019-2020 individuals across the university were invited to participate in a survey to identify Employee Resource Groups (ERGs) on Ohio State's campus. The survey was organized by The Office of Human Resources (OHR) and University Staff Advisory Committee (USAC) and made available on USAC's website as well as in the OnCampus newsletter. After survey participation ended, USAC took steps to learn more about each ERG, including reviewing websites provided and reaching out to identified leaders to connect and gain an increased understanding of each group. The goal was to identify how ERGs are benefitting staff across the university and understand how OHR & USAC can best offer support.

The information below was gleaned from conversations with six (6) ERGs who responded to USAC member requests to connect. Five (5) ERGs did not respond to requests to connect and were invited to reach out to USAC members if interested/when available in the future.

Founding & Membership

Most ERGs were started between 2017-2019 (4); two (2) ERGs had longer tenure, with one (1) being established in 1991 and another in 2010.

ERG membership numbers range from eight (8) individuals to 526 individuals, with two (2) noting fifteen (15) members in their group/organization. One (1) noted differences in terms of number of members on the listserv compared to number of members who consistently attend programs, while another noted more attendees participate in large trainings and events when held.

All ERGs have staff membership, and a number include faculty, post-docs, and students.

Funding

Most ERGs do not have/receive funding; one (1) ERG has dues; 1-2 are supported by Ohio State departments/units; one (1) hosts a conference which creates funds – this ERG also has a campaign fund

Leadership Support

Most ERGs operate on a 'grassroots' level; two (2) have unit support/leadership; all mentioned having a leadership structure within the ERG.

Recruiting

ERG leaders identified a number of ways their organization recruits members, including:

- Works with department (unit or HR) to share information/send emails (to specific roles or whole campus)
- Word-of-mouth/organically
- Shares events in OnCampus
- Has a newsletter that is shared
- Hosts events (that in turn help recruit)

ERG Conversations

<u>Resources/Activities/Events/Programs</u>
ERGs identified many resources, activities, events, and programs offered, including:
- Email Listservs
- Meetings: semesterly, bi-monthly
- Professional Development
  - Events (monthly)
    - Trainings & Webinars
  - Grants
  - Subcommittees (Equity & Inclusion, Social, Outreach & Engagement)
  - Annual Conference
  - Mentorship Program
  - Networking
- Open Discussions
- Listening Sessions / Open Forums
- Resources
  - For syllabi
  - Space for prayer
- Awards
- Social Gatherings

<u>How Can USAC and OHR Support?</u>
ERG leaders indicated the following ways or topics as to how USAC and OHR can support their efforts/organizations:
- Open for collaboration
- HR Topics: Career Roadmap, Flex Work, Gender Pay Gaps
- Enhance relationship between faculty and staff
- Inequities around professional development
  - Consistent PD to what faculty are offered
- Share information about ERGs; identify potential members
- Learn about other ERGs
- Train-the-Trainer for SafeZone
- Interested in learning what type of support is available

<u>Meeting During COVID-19?</u>
Many across the university transitioned to working from home during March 2020 due to the impact of the COVID-19 pandemic. This question inquired about the ERG's efforts during this time of remote work and being off-campus. During this time, ERGs indicated:
- Cancelling and/or postponing spring meeting/events
- Many are still meeting (Zoom, webinars) and/or sending out communications
- Staying connected: using email listservs; informal call-ins; social (WhatsApp), exploring Microsoft Teams