



SELECTED RESOURCES

Journal Articles

Health Benefits

“Costs for 3 Types of Health Plans in New Mercer Survey.” *Managing Benefits Plans* 9, no. 9 (September 2009): 5–11.

Blewett, Lynn, Peter Graven, Jeanette Ziegenfuss, and Michael Davern. “Trends in Employee Wage and Health Insurance Compensation for Employer-Sponsored Health Insurance (ESI) Coverage.” *Journal of Labor Research* 30, no. 4 (December 2009): 296–316.

Bond, Michael T., Brian P. Heshizer, Deborah Erdos Knapp, and Bryan J. Pesta. “Experience With Consumer-Driven Health Plans: Does the Performance of High-Deductible Health Plans Match Expectations?” *Compensation & Benefits Review* 39, no. 3 (May 2007): 60–68.

Fingar, Melissa. “FSAS, HSAS, and HRAS: Maximizing Available Health Care Options to Achieve Health Care Savings.” *Journal of Compensation & Benefits* 21, no. 3 (May 2005): 21–26.

Lively, Kit. “As Health Costs Skyrocket, Colleges and Employees Ail.” *Chronicle of Higher Education* 47, no. 6 (October 6, 2000): A39.

Nugent, Anthony J. “Using Voluntary Benefits Strategically Can Help Employers Address Goals of Retaining Employees and Controlling Costs.” *Benefits Quarterly* 25, no. 2 (2009): 7–10.

Reddick, Christopher G. “Comparing Public and Private Choices of Managed Health Care Plans: Rhetoric versus Reality.” *Public Personnel Management* 36, no. 3 (Fall 2007): 223–45.

Reddick, Christopher G. “The Importance of Employee Health Benefits to Public and Private Sector Organizations.” *Public Personnel Management* 38, no. 2 (Summer 2009): 49–68.

U.S. Government Accountability Office. *Health Savings Accounts*. GAO-08-474R. Washington, DC: April 1 2008. <http://www.gao.gov/new.items/d08474r.pdf>.

Retirement Benefits

Adelman, Saul W., and Mark L. Cross. “Comparing a Traditional IRA and a Roth IRA: Theory Versus Practice.” *Risk Management & Insurance Review* 13, no. 2 (Fall 2010): 265–77.

Allen, Steven G., Robert L. Clark, and Linda S. Ghent. “Managing a Phased Retirement Program: The Case of UNC.” *New Directions for Higher Education* no. 132 (Winter 2005): 47–60.

- Clark, Robert L., Linda S. Ghent, and Ann A. McDermed. "Pension Plan Choice among University Faculty." *Southern Economic Journal* 72, no. 3 (January 2006): 560–77.
- Conley, Valerie Martin. "Of Incentive Plans, Health Benefits, Library Privileges, and Retirement." *Academe* 93, no. 3 (May 2007): 20–27.
- Craig, Caroline K., and Richard B. Toolson. "Retirement Plan Options for Public University Faculty—The High Cost of a Wrong Choice." *Journal of Deferred Compensation* 13, no. 3 (Spring 2008): 36–65.
- DeGennaro, Ramon P., and Deborah L. Murphy. "Understanding 401(k) Plans." *Working Paper Series* (Federal Reserve Bank of Atlanta) 2004, no. 21 (September 2, 2004): 1–14.
- Dworak-Fisher, Keenan. "Employer generosity in employer-matched 401(k) plans, 2002–03." *Monthly Labor Review* 130, no. 9 (September 2007): 11–19.
- Eckstein, Megan. "Pension Shortfalls Put Pressure on Strained University Budgets." *Chronicle of Higher Education* 55, no. 23 (February 13, 2009): A24–A25.
- Jankowski, Joseph J. "In Search of the perfect DROP: Balancing competing interests to achieve optimal design." *Pensions: An International Journal* 10, no. 3 (June 2005): 205–11.
- Lahey, Karen Eilers, Stuart Micheleson, Natalie Chieffe, and Vickie Bejtelsmit. "Retirement plans for college faculty at public institutions." *Financial Services Review* 17, no. 4 (Winter 2008): 323–41.
- Leslie, David W. "The Costs and Benefits of Phased Retirement." *New Directions for Higher Education* no. 132 (Winter 2005): 61–71.
- Manchester, Colleen Flaherty. "The Effect of Pension Plan Type on Retirement Age: Distinguishing Plan Incentives from Career Length Preferences." *Southern Economic Journal* 77, no. 1 (July 2010): 104–25.
- McNeil, Bruce J. "Section 457 Plans for Colleges and Universities." *Journal of Deferred Compensation* 13, no. 2 (Winter 2008): 42–86.
- VanDerhei, Jack L. "Evaluation of the Adequacy and Structure of U.S. Voluntary Retirement Plans, With Special Emphasis on 401(k) Plans." *Benefits Quarterly* 26, no. 3 (2010): 33–45.

Domestic Partners and Same-Sex Spouses Benefits Eligibility

- Travinski, Michael S. "Employee Benefits for Domestic Partners and Same-Sex Spouses." *Journal of Pension Benefits: Issues in Administration* 13, no. 2 (Winter 2006): 29–38.
- Solomon, Todd A., and Brian J. Tiemann. "Smarter Domestic Partner Benefits." *HRMagazine* 54, no. 9 (September 2009): 110–14.

Web Pages

Employee Benefits Manuals

University of California

Your Group Insurance Plans

http://atyourservice.ucop.edu/forms_pubs/misc/ygip_current.pdf

University of Colorado at Boulder

Benefits

<https://www.cu.edu/pbs/benefits/>

University of Connecticut

Benefits Enrollment Guide for New Employees

<http://www.hr.uconn.edu/docs/enrgde.pdf>

University of Delaware

Get the Best from your Benefits, 2010–2011 Edition

http://www.udel.edu/hr/Benefits_09_web.pdf

Florida State University

Insurance

http://hr.fsu.edu/index.cfm?page=FacultyStaff_Insurance_InsuranceHomepage&NAV2=Insurance

University of Nebraska

NUFlex Benefits for Newly Eligible Employees 2010 (28pp)

<http://www.nebraska.edu/docs/benefits/NewEmployee2010.pdf>

Ohio University

2009 Benefits Summary

http://www.ohio.edu/hr/benefits/upload/Summary_2009.pdf

Oklahoma State University

Benefits Information

<http://hr.okstate.edu/benefits/benefits.php>

Purdue University

Benefit Plans

www.purdue.edu/hr/Benefits/benefitsPlans.html

Rutgers University

Staff Benefits Guide

<http://uhr.rutgers.edu/documents/StaffBenefitsGuide.pdf>

Temple University

Benefits

<http://www.temple.edu/hr/departments/benefits/index.html>

Virginia Tech

Welcome to Human Resources Benefits!

<http://www.hr.vt.edu/benefits/index.html>

Yale University

2010 Benefits News and Updates

<http://www.yale.edu/hronline/benefits/index.html>

Clerical & Technical Benefits

<http://www.yale.edu/hronline/benefits/ct.html>

Faculty Benefits

<http://www.yale.edu/hronline/benefits/fac.html>

Managerial & Professionals Benefits

<http://www.yale.edu/hronline/benefits/mp.html>

Retirement Plans

University of Arizona

Financial Security Benefits

http://www.hr.arizona.edu/financial_security_benefits

University of California

Human Resources and Benefits

http://atyourservice.ucop.edu/employees/retirement_savings/index.html

University of Connecticut

Retirement

<http://www.hr.uconn.edu/benefits/retplans.html>

Duke University

Retirement Plans

<http://www.hr.duke.edu/benefits/retirement/>

University of Louisville

Retirement Program

<http://louisville.edu/hr/benefits/retirement/>

University of Michigan

Benefits Plans – Retirement Savings Plans

<http://benefits.umich.edu/plans/retire/index.html>

University of Minnesota

Retirement Savings Plans

<http://www1.umn.edu/ohr/benefits/retiresave/index.html>

Virginia Tech

Retirement

<http://www.hr.vt.edu/benefits/retirement/index.html>

Yale University

Retirement Plans - C&T

<http://www.yale.edu/hronline/benefits/RetirementCT.html>

Retirement Plans - Faculty

<http://www.yale.edu/hronline/benefits/RetirementFA.html>

Retirement Plans - Managerial & Professional

<http://www.yale.edu/hronline/benefits/RetirementMP.html>

Deferred Retirement Option Plan or DROP

Florida State Department of Management Services

Deferred Retirement Option Program (DROP)

http://dms.myflorida.com/human_resource_support/retirement/employee_page/deferred_retirement_option_program_drop

Early Retirement Incentive Program or ERIP

Yale University

Information for M&P staff interested in voluntary layoffs

<http://www.yale.edu/hronline/benefits/voluntaryseparation.html>

Phased Retirement

University of Arizona

The Arizona Board of Regents Phased Retirement Program for Optional Retirement Plan Participants

http://www.hr.arizona.edu/abor_phased_retirement_program_for_orp_participants

University of Colorado

Faculty Retirement Agreements, Boulder Campus Guidelines

[http://www.colorado.edu/facultyaffairs/atoz/FACULTY_RETIREMENT_AGREEMENTS_\(3\)_10_1.doc](http://www.colorado.edu/facultyaffairs/atoz/FACULTY_RETIREMENT_AGREEMENTS_(3)_10_1.doc)

University of Kentucky

Faculty and Staff Phased Retirement Procedures - Step by Step

<http://www.uky.edu/HR/benefits/PhasedRetirementProc.html>

Staff Phased Retirement Frequently Asked Questions

<http://www.uky.edu/HR/benefits/documents/PhasedRetirementFAQ2.doc>

University of Louisville

Phased Retirement Options for University of Florida Faculty

<http://louisville.edu/provost/faculty-personnel/phase-retirement-options-for-university-of.html>

University of Minnesota

Phased Retirement Program and Administrative Procedure

<http://policy.umn.edu/Policies/hr/Benefits/PHASEDRETIREMENT.html>

Implementing the Phased Retirement Program

http://policy.umn.edu/Policies/hr/Benefits/PHASEDRETIREMENT_PROC01.html

North Carolina State University

Phased Retirement Program

<http://www7.acs.ncsu.edu/hr/benefits/prp.asp>

2011-2014 Phased Retirement Program Department Guidelines

http://www7.acs.ncsu.edu/hr/benefits/pdf/prp_guide.pdf

NC State University Phased Retirement Program Benefit Plan and Payroll Deduction Continuation Options

http://www7.acs.ncsu.edu/hr/benefits/pdf/prp_continuation.pdf

Application and Re-employment Agreement

http://www7.acs.ncsu.edu/hr/forms/benefits/prp_app.pdf

University of North Carolina Phased Retirement Program 2011–2014 General Release

http://www7.acs.ncsu.edu/hr/forms/benefits/prp_genrelease.pdf

Phased Retirement Program for Tenured Faculty REG05.57.1

<http://www.ncsu.edu/policies/employment/retirement/REG05.57.01.php>

Staying Connected to NC State

http://www7.acs.ncsu.edu/hr/benefits/pdf/stay_connected/connected07.pdf

North Carolina State University 2011–2014 Phased Retirement Program Frequently Asked Questions (FAQs) from Faculty Members

http://www7.acs.ncsu.edu/hr/benefits/pdf/prp_faq.pdf

University of Pennsylvania

Policy No: 414.1 Voluntary Phased Staff Retirement

<http://www.hr.upenn.edu/policy/Policies/414.aspx>

Sample Phased Staff Retirement Proposal

http://www.hr.upenn.edu/policy/Policies/Phased_Retirement_Proposal.pdf

Sample Voluntary Phased Staff Retirement Agreement

http://www.hr.upenn.edu/policy/Policies/Phased_Retirement_Agreement.pdf

Voluntary Phased Staff Retirement Frequently Asked Questions

<http://www.hr.upenn.edu/Benefits/Retiring/PhasedRetirementFAQ.aspx>

Life and/or ADD Insurance Plans

University of Florida

Life Insurance

http://www.hr.ufl.edu/benefits/insurance/life_insurance.asp

Indiana University Bloomington

Insurance Plans

<http://www.indiana.edu/~uhrs/benefits/insurance.html>

North Carolina State University
Life Insurance & Asset Protection
<http://www7.acs.ncsu.edu/hr/benefits/lifeinsurance.asp>

Purdue University
Universal Life Insurance
www.purdue.edu/hr/Benefits/universal_life.html

University of Rochester
Life Insurance Plans
<https://www.rochester.edu/working/hr/benefits/life/>

Health Insurance Plans

University of Connecticut
Health Insurance
<http://www.hr.uconn.edu/benefits/healthins.html>

University of Florida
Health Insurance and Health Investment Plans
http://www.hr.ufl.edu/benefits/insurance/health_insurance.asp

University of Georgia
Health Insurance
http://www.hr.uga.edu/benefits/bensumm/health_summ.html

University of Louisville
Health Insurance Plan
<http://louisville.edu/hr/benefits/health/>

University of Rochester
Health Care Plans
<https://www.rochester.edu/working/hr/benefits/health/plan/>

Virginia Tech
Health Care
<http://www.hr.vt.edu/benefits/healthcare/index.html>

University of Waterloo
Medical Benefits
<http://www.hr.uwaterloo.ca/benefits/medical/medical.html>