



## **SELECTED RESOURCES**



## Journal Articles

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### 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

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### Employee Benefits Manuals

University of California

*Your Group Insurance Plans*

[http://atyourservice.ucop.edu/forms\\_pubs/misc/ygip\\_current.pdf](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](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](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](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](http://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](http://www.hr.arizona.edu/financial_security_benefits)

University of California

*Human Resources and Benefits*

[http://atyourservice.ucop.edu/employees/retirement\\_savings/index.html](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](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](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](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](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](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](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](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](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](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](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](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](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](http://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](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](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>