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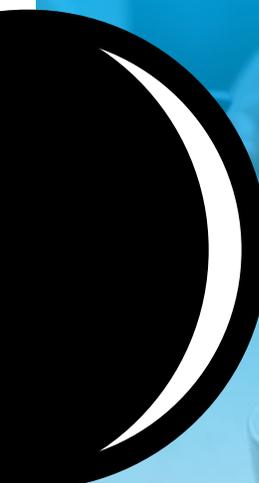
THE RESOURCE

San Diego Society for Human Resource Management

Transgender Workplace Success *Connor Maddocks*

Wednesday April 20
Noon - 1:30 p.m.

Marriott La Jolla
4240 La Jolla Village Drive
La Jolla, CA 92037



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Calendar

April 20

Lunch Education Program

May 9

Breakfast Education Program

June 15

Membership Mixer

August 17

Membership Mixer

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Student Liaison

Debbie Te'o
San Diego State University

Executive Director

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The Grassley Group

New Members

*San Diego SHRM welcomes all new members since
March 1!*

Jackie Angel

Alyssa Hilliard

William Coffey

Kelley Isham

Kaylene Diaz

Patrese Magliazzo

Oscar Flores

Raina Rutlen

C. Mariela Garcia-Hofer

Jenna Schier

Alicia Gonzalez

Stephanie West



To recognize the long and storied history of San Diego SHRM, we reached out to each of our Past Presidents.

San Diego SHRM Past President Spotlight

Bernard (Bernie) Kulchin

San Diego SHRM Past President

I served as President of the San Diego Society of Human Resource Management in 1976. At that time however, the organization's name was the Personnel Management Association (PMA). At the time we had about 100 members and 50 to 75 attendees at each of our meetings. Therefore, our primary challenge was to enhance the growth of the organization, and to do that through some outstanding programs and speakers. We wanted to be the prime resource for professional HR development for HR individuals in our community. We achieved those objectives since the organization grew and we had some great programs to offer. Another significant accomplishment was the establishment of a San Diego HR network, which allowed our members to call upon each other to solve problems.

Regarding my own career in HR, I was fortunate to participate as a leader in the HR community for over 57 years. I served as Director of Labor Relations, Vice President of Human Resources for General Dynamics Corporation; consulted and conducted Leadership Development for Corporations around the US; and finally concluded my career as Corporate Vice President of Human Resources at Cubic Corporation in San Diego. I was truly honored by San Diego SHRM to be presented with the first Lifetime Achievement Award in HR. Serving as President of San Diego SHRM was a very valuable experience for me. It allowed me to develop solid HR relationships, and allowed me to further HR professional development for the HR community. Serving in this leadership role also helped me in my career to strengthen my leadership skills and effectively recruit and work with volunteers. This has been invaluable to me currently, as I serve on four nonprofit boards in San Diego and volunteers are critical to the success of the nonprofit community.

If you are a San Diego SHRM Past President, we would like to spotlight you in The Resource. If you are interested, please contact us at info@sdshrm.org or 866-632-1492.



Bernard (Bernie) Kulchin
San Diego SHRM Past President



Join the *Disneyland*® Corporate Ticket Program today.

Help your employees show their Disney Side by making it easier for them to experience all there is to see and do at the *Disneyland*® Resort!

Bringing the magic to your company has never been easier!

- Employees can save over box office prices.
- It's FREE to join.
- Tickets are sold online for easy access.
- Earn complimentary tickets when sales minimums are achieved.

To set up this exciting benefit for your employees, contact Mary Ann Waters at mary.ann.waters@disney.com or visit shrm.org today!

Disneyland
RESORT

This is the second of a three part series of articles by San Diego SHRM Member, Kate Langmore, Esq., and is the capstone project for the Human Resources Certificate at UCSD Extension. Kate serves on San Diego SHRM's Communications Committee.

Exploring HR's Role as Credible Activist: Moving beyond Compliance to Values-Based Ethics

PART II

Kate Langmore, Esq.



Kate Langmore, Esq.

HR's Role in Our Transparent World

Would the Volkswagen scandal have spread so quickly and caused so much damage if it took place before the age of the internet and social media? Perhaps not. The link between public relations and human resources has been strengthened in the age of the internet. Today, HR not only answers to the company's CEO and other management, it answers to the world at large.

If HR ignores this reality, and instead views itself as only answering to a company's legal department, the focus may be on compliance. But compliance is the floor. Ethics is an aspirational and more engaging point from which to operate. By structuring an organization so that HR answers to the CEO, and a focus on ethics is conveyed by top management, it is more likely to take precedence.¹ In turn, a company's public relations may benefit, its reputation amongst consumers may improve and its sales may increase.

The internet and associated advances in communication have facilitated a global economy and immediate access to information for people around the world. Customers, employees and the general public demand instant access to an organization's inner workings. Websites such as Glassdoor.com provide access to once-confidential employer information such as salary and interview strategy.² Disgruntled employees and former employees can embarrass an organization and even damage its reputation by posting unflattering information about the organization's ethics or lack thereof to internet venues. "In a transparent world, where there is a constant tension between the expectation of easy access to information and the fear that confidential information will become public, HR needs to play a leadership role in helping the organization make more information available while also managing the risk of sharing too much."³

What is "too much"? Personal information about employees, including sensitive information such as social security numbers and home addresses are obvious examples. What are positive examples of information sharing? HR can communicate promotional and development opportunities to employees to foster a culture where employees feel they have a fair opportunity for advancement. Also, HR can provide information to employees about how compensation and benefits decisions are made and how jobs are valued. Keeping salary information secret is unlikely to work because this information is likely to be discovered anyway.⁴ Moreover, forbidding employees from discussing the terms of their compensation is actually a violation of public policy and may expose an organization to litigation.⁵

Part III, HR's Role in Compliance and HR's Role in Effective Ethics Programs, will appear in May's edition of The Resource.

¹ "Ethics: The Price of Admission in High-Performing Organizations" by Clarissa Peterson, Advocates of the HR Profession, Dave Ulrich, William A. Schiemann and Libby Sartain at 58.

² "HR and Transparency," by Susan Meisinger at 125 within The Rise of HR, Wisdom from 73 Thought Leaders, Dave Ulrich, William A. Schiemann and Libby Sartain, HR Certification Institute 2015 at www.riseofhr.com

³ Meisinger at 126.

⁴ Meisinger at 127.

⁵ Section 7 of the National Labor Relations Act (NLRA) gives union and non-union employees the right to engage in "concerted activities for the purpose of collective bargaining or other mutual aid or protection." Section 8 of the NLRA makes it an unfair labor practice for an employer to limit its employees' Section 7 rights. The California Labor Code prohibits discrimination against employees and job applicants for discussing or disclosing his or her wages, or for refusing to agree not to disclose his or her wages. Labor Code Sections 232(a) and (b)

San Diego SHRM Legal and Legislative Update.....

Christine Mueller, Esq., VP of Legislation



*Christine Mueller, Esq., VP of
Legislation*

Legislative Update:

EEOC Implements New Procedures for Position Statements

The Equal Employment Opportunity Commission has implemented nationwide procedures regarding respondent position statements. These procedures provide for the release of respondent position statements and non-confidential attachments to a charging party, or his or her legal counsel, upon request during an investigation. If a respondent relies on confidential information, it should provide such information in separately labeled attachments. Questions and answers regarding the new procedures can be found at:

http://www.eeoc.gov/eeoc/newsroom/release/position_statement_procedures.cfm.

Department of Labor Releases New Fact Sheet on Joint Employment under the FMLA

The U.S. Department of Labor (DOL) has issued another document focusing on joint employment liability under the laws that it enforces, in this case, the Family and Medical Leave Act (FMLA). Under this guidance, the DOL takes an expansive view of joint employment liability. This evidences the DOL's intent to use the joint employment theory to expand the number of employers who are responsible for compliance with the FMLA. The fact sheet can be found here: <http://www.dol.gov/whd/regs/compliance/whdfs28n.htm>.

Department of Labor Expected to Release Final Rule on White Collar Exemptions

The U.S. Department of Labor (DOL) plans to increase the minimum annual salary requirement under the Fair Labor Standards Act (FLSA) for executive, administrative, and professional overtime exemptions to \$50,440. This amount would be adjusted annually. The proposed duties test for these exemptions would closely follow the existing California rules. While California employers are already governed by strict exemption rules at the state level, if they are subject to the FLSA, they should ensure that exempt employees also meet the salary thresholds under the FLSA and these proposed federal regulations. The DOL plans to make the new regulations effective 60 to 120 days after the final rule is published.

Department of Labor Expected to Release Final "Contractor Blacklisting" Regulations

The Obama administration has targeted April 2016 for the release of its final regulations implementing the "Fair Pay and Safe Workplaces" Executive Order, better known as the "contractor blacklisting" regulations. Certain federal contractors and subcontractors would have an obligation to report employment law violations, which would

be used by contracting officers to determine whether to award a new federal contract or terminate an existing contract. The final regulations are expected to transform the way that government contractors approach violations of federal and state employment laws as well as audits by federal and state government agencies.

New California Anti-Discrimination and Harassment Policy Requirements Take Effect April 1

California's Fair Employment and Housing Council has issued new regulations to clarify employers' existing obligations under the Fair Employment and Housing Act. Under the new regulations, employers must develop written anti-discrimination and harassment policies that meet detailed requirements. Policies must include the following information:

- a list of protected categories under California law;
- a clear prohibition of unlawful conduct;
- instructions to supervisors to report misconduct;
- a complaint mechanism that does not require an employee to complain directly to an immediate supervisor;
- a statement that the employer will conduct a fair, timely, and thorough investigation into complaints of misconduct;
- a statement that confidentiality will be kept to the extent possible;
- indication that if misconduct is found during the investigation, appropriate remedial measures will be taken; and
- clarification that an employee will not be exposed to retaliation for making a complaint or participating in the investigation of a complaint.

Employers may provide the policies in hard copy form with employee acknowledgements, or they can distribute the policies electronically by emailing them with a return acknowledgement form or making it available on an intranet with a tracking system that ensures each employee has reviewed it. The regulations also require employers to distribute such policies to employees in English as well as any other languages that are spoken by at least 10% of the workforce.

Employers should review and update their anti-discrimination and harassment policies, ensure that proper complaint and investigation procedures are in place, and train human resources personnel on these new regulations and updated policies. Employers are encouraged to consult with employment counsel to ensure that their policies are in compliance.

DFEH Issues Guidance Regarding Transgender Employees

The California Department of Fair Employment and Housing (DFEH) has issued frequently asked questions regarding "Transgender Rights in the Workplace", available here: <http://www.dfeh.ca.gov/res/docs/Publications/DFEH162TGR.pdf>.

The DFEH describes two types of gender transition: (a) social transition, which is a process of aligning one's gender with the internal sense of self, and (b) physical transition, which is a process of medical treatments to physically align the body with the internal sense of self. A transgender person does not need to complete any particular step in a gender transition to be protected by California law. The DFEH also cautions against asking questions about marital status, spouse's name, relation of household members, or surgery plans. The guidance also states that transgender employees have the right to use a restroom that corresponds to their gender identity, regardless of their birth sex.

Judicial Update: Proof of Employer's Ill Intent is not Required in Certain Disability Discrimination Cases

In *Wallace v. County of Stanislaus*, a California Court of Appeal issued a decision regarding an employer's intent to discriminate against an employee with an actual or perceived disability.

Dennis Wallace ("Wallace") worked as a deputy sheriff for the County of Stanislaus ("County"). After injuring his knee and having surgery, he took paid leave. He returned to work on a light duty assignment, and then took another leave of absence because of his knee, exhausting his paid leave. The County then accommodated Wallace by assigning him to a bailiff position for at least 12 months at his pre-injury rate of pay. But six months later, Wallace underwent a medical review which resulted in a physician's report describing several limitations on Wallace's physical abilities. Without consulting Wallace's supervisors, and over Wallace's objections, the County interpreted the limitations to mean that Wallace could not safely perform the essential functions of the bailiff position. The County placed Wallace on an unpaid leave of absence.

After Wallace's disability-related claims went to trial, the jury determined that Wallace was able to perform the essential job duties of a bailiff, and the County had made an incorrect assessment based on his physician's report.

The appellate court focused on the instructions that were given to the jury in their consideration of discriminatory intent. The County argued that Wallace was required to prove discriminatory animus or ill will towards Wallace in order to establish disability discrimination. The appellate court disagreed, relying on the language of the California statute as well as the California Supreme Court's 2013 ruling in *Harris v City of Santa Monica*. In cases where an employee is found to be able to safely perform the essential functions of the job, an employee can establish intent to discriminate by proving that: (1) the employer knew that the employee had a physical condition that limited a major life activity, or perceived him to have such a condition, and (2) the employee's actual or perceived physical condition was a substantial motivating reason for the employer's decision. In other words, in these types of disability discrimination cases, the employee does not need to prove ill intent. The appellate court found the County liable for disability discrimination as a matter of law, and remanded the case to determine the amount of damages.

Employers need to proceed cautiously if they disagree with an employee's assertion that he or she is able to perform the essential functions of the job. If the employer's assessment of the employee's abilities is mistaken, the employer bears the risk. This case demonstrates the importance of a thorough interactive process between the employer and employee.

California Appellate Court Finds Arbitration Agreement Unconscionable

In *Carbajal v. CWPSC, Inc.*, a California Court of Appeal found a mandatory arbitration agreement with a class action waiver to be unenforceable.

CWPSC, Inc. ("CW Painting"), a company that provides residential house painting services, hired Martha Carbajal ("Carbajal") to sell its services and manage its paint crews. Carbajal was a college student at the time, and CW Painting presented her with an employment agreement that contained an arbitration provision and a class action waiver ("Agreement"). The Agreement was not explained to Carbajal. After Carbajal left her employment, she filed a wage and hour class action, and CW Painting attempted to enforce the arbitration provision and class action waiver.

CW Painting first argued that the Agreement was governed by the Federal Arbitration Act (“FAA”), which preempts all California statutes and case law invalidating class action waivers or otherwise limiting the enforceability of arbitration agreements. However, CW Painting presented no evidence that it had any connection to interstate commerce, and the fact that Carbajal simply used phone lines to follow up with customers was not enough. Thus, the FAA did not apply.

The appellate court found that the Agreement was procedurally unconscionable because it was imposed as a term of Carbajal’s employment, it failed to identify which rules of the American Arbitration Association (“AAA”) applied, it failed to provide a copy of the AAA rules, and it required Carbajal to sign the Agreement without telling her where to find the rules.

The appellate court also found that the Agreement was substantively unconscionable, for three reasons: (1) it allowed CW Painting to obtain injunctive relief in court while requiring Carbajal to seek relief through arbitration; (2) it waived the statutory requirement that CW Painting post a bond or undertaking to obtain injunctive relief; and (3) it provided that Carbajal was required to bear her own attorneys’ fees, which effectively waived her statutory rights under the Labor Code. Because the Agreement contained these three unconscionable terms, it was “permeated with unconscionability” and the entire Agreement was deemed unenforceable.

This case highlights the importance of regularly reviewing employment arbitration agreements with experienced employment counsel to ensure maximum enforceability.

Ninth Circuit Reinstates EEOC Case against Arizona Prisons

The Equal Employment Opportunity Commission (EEOC) brought a lawsuit on behalf of a group of female employees who alleged that they were sexually harassed while working at Arizona correctional facilities. Although the district court dismissed the lawsuit, in *State of Arizona, ex rel. v. The Geo Group, Inc.*, the Court of Appeals for the Ninth Circuit reversed the decision and allowed the case to proceed.

Alice Hancock (“Hancock”), who worked as a prison guard for a private contract facility, alleged several acts of sexual assault and harassment by a sergeant. The local civil rights agency and the EEOC investigated the charge and discovered additional victims of alleged harassment, issuing a cause determination in favor of Hancock and extending the determination to a class of female employees. After conciliation failed, the agency and the EEOC sued, seeking to represent classes of women at two facilities.

The district court dismissed the women from the case who were not identified during the initial investigation and had not participated in the conciliation process. The district court also dismissed several defendants on the grounds that they had not committed the alleged acts within 300 days of the cause determination. The hostile work environment claim was also dismissed because it was determined that the conduct was not sufficiently severe or pervasive.

The Ninth Circuit completely overturned the district court’s decision. First, the court found that the EEOC had made proper conciliation efforts by providing the employer with detailed allegations, a written settlement proposal, and a formal conciliation agreement. The EEOC had no obligation to conciliate individually for each claimant, and could instead negotiate on behalf of a class of women. Even if no conciliation attempts were made, the proper remedy would be a stay of the proceedings, not a dismissal of the claims. Second, the district court misapplied the “300-day” rule. The proper time for measurement was 300 days before Hancock’s charge, not the date of the cause determination. Finally, looking at the totality of the evidence, the dismissal of the hostile work environment claim was error because there was a genuine dispute of material fact as to whether the alleged comments and gestures created a severe and pervasive hostile work environment.

This case evidences a trend by the EEOC and state agencies to expand their investigations of single-employee complaints to look for other similarly-situated employees who may have experienced the same conduct.

San Diego SHRM Treasurer's Report

Jeff Hobbs, SHRM-SCP, SPHR, Treasurer



Jeff Hobbs, SHRM-SCP, SPHR, Treasurer

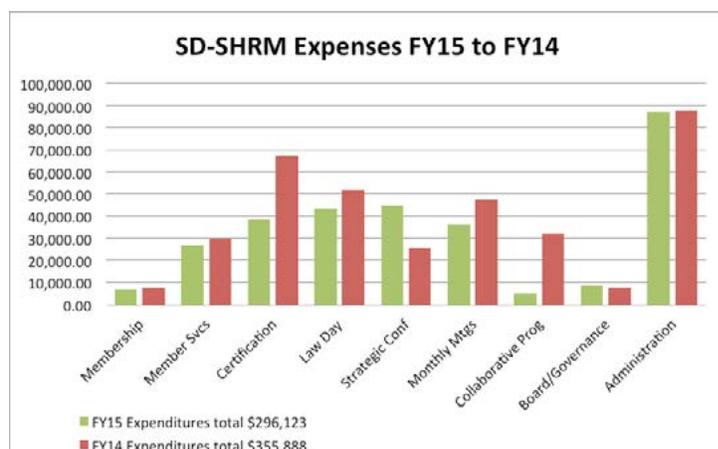
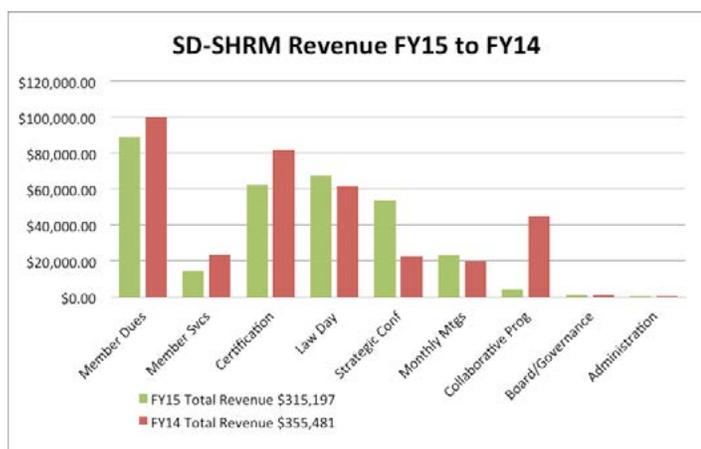
Hello San Diego SHRM members! Hard to believe that another year is sailing by, but as I look back at the many wonderful encounters of 2015 and first quarter of 2016, I am once again reminded just how much I enjoy being a part of our group. I feel renewed energy and excitement this year as we welcome new leadership. Your new Board began the year examining everything that has come before, and there have been many great discussions questioning how things have been and should be done. Our financials have been carefully examined during this process, and there is good news to report.

You may recall that we have been focusing heavily on our events over recent years. The opportunity to come together and learn from each other is one of the most important aspects of our community. Our constant focus to provide all of you with both helpful and fiscally prudent events has begun to pay off. Both of our recent large events, Workplace Strategies Conference and Law Day, have been big successes in content, member satisfaction and income. Our Workplace Strategies Conference revenue, for example, beat our budget number by 78 percent! Our numbers for Law Day this January, although not counted as part of last year's success, show a year-over-year increase in revenue of 30 percent against an increase in expenses of only 6 percent. In addition, our smaller meetings and mixers also performed well last year. These gains have allowed us to come in 31 percent over our projected total surplus for the year. A summary of our 2015 financials can be found in the charts below.

Our hope is that we will see membership numbers rise this year, as word gets out that we are delivering on our promise of providing relevant training topics and exciting networking

opportunities. We recognize the concerns many HR professionals had during the certification changeover last year, and are optimistic that we will see our SCP/CP and SPHR/PHR classes' attendance rise soon. As always, we continue to search for sponsor partners who see the value we bring to San Diego HR professionals.

As I sit here writing this update, I see many people celebrating the holiday and the season by wearing green, which is a particularly comforting color for a Treasurer! Green also means go, and we certainly aren't slowing down this coming year! I just signed the check trademarking our Workplace Excellence Awards®, which we are working to make bigger and better. Next month we are mentoring up-and-coming HR professionals at SHRM SDSU, which has a growing student membership. Soon we will debut an improved website that we hope will be more intuitive and informative and as last month's mixer proved, we are continuing our slate of educational and fun programming this year. It is through the continuing efforts of all our members and volunteers that San Diego SHRM's Board of Directors is empowered to provide significant and relevant encounters and services every year. The Board always welcomes any questions and other input from our membership, volunteers and sponsors in person at events, via our email surveys, through the sdshrm.org website and on our social media pages. On behalf of all our Board, both past and present, thanks to each and every one of you for an outstanding 2015!



Scholarships for HR Professionals through the SHRM Foundation!

The SHRM Foundation has substantially increased its award funding and increased the individual award amounts. We are proud to offer five awards of \$2,500 each to those pursuing undergraduate degrees, plus 15 awards of \$5,000 each to those pursuing graduate education. Funds may be used for any combination of tuition, books or other course-related fees. Each scholarship is a one-time award; however previous applicants and past scholarship recipients are eligible to re-apply. Twenty academic scholarships are awarded annually, four in each SHRM domestic region.

Who is Eligible

To be considered for these scholarships:

- You must have a current SHRM membership as of July 15, 2016 and throughout the rest of the year. SHRM student members are not eligible for this program. (View scholarships for SHRM student members.)
- You must be enrolled in a degree-seeking program pursuing an undergraduate, masters or doctorate degree in an HR-related field (includes business, psychology, organizational development, etc.) through an accredited institution of higher learning. Full-time, part-time, online and distance learning programs are acceptable. Scholarships are for college degree programs only, and may not be used to attend professional development seminars.
- You must be accepted and ready to begin your studies within six months following notification of the award. Scholarship recipients will be required to provide evidence of acceptance or enrollment in an HR-related program of study in order to claim their award. Applicants who have already completed their studies are not eligible for this award and may not apply for a scholarship to cover past expenses.

Each scholarship is a one-time award; however previous applicants and past scholarship recipients are eligible to re-apply.

Employees or board members of SHRM or the SHRM Foundation and members of their immediate family are not eligible to apply for SHRM Foundation grants, awards or scholarships.

How to Apply

To apply for this scholarship, just complete and submit the online application using the link at the end of this page. It includes contact information and a series of short answer questions about your volunteer experience and your career aspirations. You will also be asked to

upload a current resume that includes your SHRM/SHRM Foundation volunteer experience, and two letters of references.

Reference letters should be addressed to the "SHRM Foundation Scholarship Review Committee" and should provide insight into your character, career and volunteer accomplishments, work ethic, values and need for the scholarship.

Selection Criteria

Scholarship recipients will be selected primarily on merit. Scholarship applications are reviewed and scored by groups of SHRM volunteers based on the following criteria. All decisions are final.

- 50% Work experience/progression (HR involvement & future career plans)
- 30% Volunteer activity (SHRM experience preferred, but not required)
- 20% Financial need

Volunteer judging committees are formed in each of the five SHRM domestic regions to review the scholarship applications. Each region will award certification scholarships and academic scholarships to members in their states, so applicants are competing only with other applicants in their own region.

Applicants selected for an award will be required to provide a Social Security number or tax ID and evidence of acceptance or enrollment in a degree program prior to receiving their scholarship.

Timeline

Applications must be completed and submitted online by July 15, 2016. All applicants will be notified of the scholarship results by October 7. Scholarship checks will be distributed by the end of the year, after receipt of tax ID and enrollment verification.

- Apply for an Academic Scholarship

News from San Diego State University's Student SHRM Chapter (SHRM SDSU)

Debbie Te'o, SHRM SDSU President and San Diego SHRM Student Liaison

It is hard to believe, but the spring semester is half-way over! SHRM SDSU has been busy hosting a professional development event every other week. This past month we had two successful career development events. We hosted an interactive LinkedIn workshop featuring career coach, Kolby Goodman on February 23. Kolby provided students with information on how to use LinkedIn to develop a professional online presence, polishing your personal brand to help you stand out and creating an attention-getting summary. An interesting bit of advice he shared was that the LinkedIn summary should be in the first- rather than the third-person, as third person in LinkedIn is considered too impersonal—good to know!

We were pleased to have HR consultant and former San Diego SHRM Board Member, Daniel Del Castillo share his expertise on acing the employment interview. Students were very engaged by his participative presentation gaining insight on the significance of tailoring resumes to specific job interests, impressing upon us the importance of researching prospective employers—and recommended using the San Diego Business Journal's annual Book of Lists to help in that regard, being prepared to ask well-thought out questions relevant to the organization during an interview, and sharing tips on how to read between the lines of online job postings. Students were hanging on to every word of his information-packed presentation. We thank Daniel for his engagement with our students including presenting to our chapter, coming to our classes to guest lecture and agreeing to serve as a mentor at our upcoming mentoring event next month!

SHRM SDSU members spent their Saturday morning on March 19 giving back to the community, and teamed up to volunteer for the Race for Autism 5K Run/Walk in Balboa Park. This event is hosted by the National Fundraiser for Autism Research (NFAR) where they give 100 percent of funds raised to support local autism programs, services, treatments, outreach efforts and educational initiatives to hundreds of classrooms around San Diego County. Our volunteers woke up bright and early to assist at the T-shirt booth and help pass out T-shirts and capes for those participating in the race. Members had a blast working together and volunteering for a great cause!

These events helped our chapter to wrap up the SHRM merit year, which runs from April 1-March 31. The purpose of the SHRM Student Chapter Merit Award Program is to encourage development of effective student chapters and to promote outstanding activities and projects. Chapters

are recognized for their achievements and exemplary activities during the award year. There are multiple levels of recognition, including: Honorable Mention, Merit Award, Superior Merit Award, and Outstanding Student Chapter Award. Up to 10 student chapters nationwide will receive the highest merit recognition, Outstanding Student Chapter Award, this merit year. SHRM SDSU has participated in the merit award program the past two years and both times received this highest merit designation. We will be submitting materials documenting our activities and events during the 2015-2016 merit year over the next couple weeks, and we have compiled a portfolio that we hope is worthy of receiving the recognition a third year in a row.

April is going to be both exciting and busy for SHRM SDSU. We have a number of great professional development events lined up for our students. We are especially excited for our 3rd Annual HR Professional Mentoring Event coming up on April 5. We thank the mentors that have already answered the call to participate in this year's event. We couldn't do this without our fantastic mentors, many of whom are San Diego SHRM members. We appreciate your time, support and contribution to making our event a success. We are looking forward to giving our first **Natasha Sandrock Arthur Outstanding Service Award** at our event to honor her legacy and present this award to an individual in the HR community who has helped our chapter to serve the professional development needs of our students.

We will be sending 11 students to the West Region SHRM Student Case Competition and Career Summit in Salt Lake



Debbie Te'o, SHRM SDSU President and San Diego SHRM Student Liaison



SDSU SHRM Chapter advisor, Dr. Michelle Dean and chapter officers with guest speaker and San Diego SHRM member, Daniel Del Castillo.

City on April 29-30. SDSU's 2016 HR case competition team (SDSU SHRM officers - Debbie Te'o, Alexandra Saba, Ryan Prout, Travis Doderlein and Jenna Coyne) is hard at analyzing practice cases to prepare for the competition. SHRM has a great lineup of speakers and networking activities available for attendees in addition to the case competition. We are excited to be sending a group of students to a SHRM student conference for the fourth year in a row.



SHRM SDSU members volunteering at the Race for Autism.



2016 Spring SHRM Seminars

COMPETENCY-BASED EDUCATION

Invest in your education with SHRM Seminars in San Diego, CA

SHRM, in partnership with San Diego SHRM, is hosting five competency-based HR education programs in San Diego in April. SHRM Seminars are designed to address the key functions and competencies required to operate effectively as an HR professional. Invest in a SHRM Seminar to:

- ◆ Advance your education in key HR knowledge, competencies and best practices
- ◆ Network with other HR professionals
- ◆ Learn from subject-matter expert instructors
- ◆ Earn recertification credits for SHRM-CP/SHRM-SCP and other HR credentials

Visit shrm.org/seminars/sandiegoshrm and enter code **16SEMSANDIEGO*** to receive \$200 off your San Diego SHRM Seminar registration.

SHRM Seminars in San Diego

APRIL 18-19	APRIL 18-19	APRIL 18-20	APRIL 19-20	APRIL 19-20
California HR: Applying CA Law to Employment Practices	Organizational Development & Effectiveness	SHRM-CP/SHRM-SCP Certification Preparation	Business Acumen: Integrating HR Across Operations	Workforce Planning Strategies to Support Organizational Needs

*Offer only applies to SHRM Seminars hosted in San Diego, CA, in April 2016, excluding SHRM-CP/SHRM-SCP Certification Preparation, and does not apply to Seminars in other cities, virtual Seminars, Seminars outside the U.S., SHRM Conferences, or Seminars held at SHRM Conferences. Offer applies to online and phone orders only. It does not apply to mailed-in orders, faxed orders, or purchase orders. Offer is not valid on previous orders and cannot be combined with other promotions. Expires April 19, 2016, at 11:59 p.m. PT.

Workforce Readiness Committee Update

Jennifer Dar, VP of Workforce Readiness

The Workforce Readiness Committee is excited to serve those in-transition and looking for opportunities to grow their careers! Susan Wheeler, M.Ed., CCP (Certified Compensation Professional), and Len Legotte, certified career coach and adjunct faculty at Brandman University, dive right into this initiative by moderating free workshops that cover a variety of topics from interviewing skills, to professional branding and networking, to how to negotiate your salary.

On March 10, the workshop welcomed Steven Axel, an executive career coach, who gave a stellar presentation on Advanced Tips for LinkedIn.

The purpose of these workshops is to provide support and job lead(s) for those seeking new career opportunities primarily in the HR field, however other fields are also welcome. A San Diego SHRM membership is encouraged, but not required.

In-transition workshops are held every second and fourth Thursday of the month at 5:45 p.m. at Brandman University in Mission Valley – 7460 Mission Valley Road.

Scheduled Workshop topics:

4/14: Where to Find Your Ideal Job/Networking

4/28: Interviewing Part 1

5/12: Interviewing Part 2

5/26: Negotiating a Job Offer and Starting Out Right

If you know anyone who might be interested in attending these free workshops, please encourage them to attend, and visit [<http://www.sdshrm.org/?page=HRJobs>] for HR jobs in San Diego!



Jennifer Dar, VP of Workforce Readiness



Susan Wheeler and Phebe Jones as guest speakers for a SHRM SDSU Professional Branding Workshop, November 2015.

Member Spotlight

William E. Coffey, F.S.A.

Sogno Retirement Consulting Services, Inc.

Bill Coffey is the Owner and principal Retirement Coach for Sogno Retirement Consulting Services, Inc. Sogno is an Italian word meaning dream.

Sogno Retirement Consulting Services helps individuals achieve their retirement dreams by providing retirement coaching services that are not offered by 401(k) providers, investment advisors and most financial planners.

While others concentrate primarily on investing for retirement, Sogno specializes in two other key areas:

- Determining life planning issues for retirement (e.g. where will I live?)
- Utilizing sophisticated retirement financial modeling software to determine retirement readiness

In addition, Sogno offers assessments, study materials, activities and books that have benefited thousands of individuals, couples and employees of corporate clients in assessing their retirement readiness and creating a more successful retirement.

This is too important to 'go it alone.' Individuals are living longer, and they do not want to outlive their retirement assets. Sogno attracts clients who want a blueprint for their employees' retirement and the means to guarantee success. Sogno also works with employers who are offering retirement coaching as part of their benefits package.

As a Fellow of the Society of Actuaries, Bill Coffey has more than 40 years of employee benefits and executive compensation plan experience. An actuary is

a business professional who deals with the measurement and management of risk and uncertainty (e.g. life expectancy). This is a vital skill for a Certified Retirement Coach, like Bill.

His practice has concentrated on actuarial consulting and employee benefit administrative services. Bill has worked with clients to design, finance, administer and communicate their employee benefits and executive compensation plans.

Bill is proud to have the education and experience to lead Sogno to success:

- 28 years as sole owner and actuary of Atéssa Benefits, Inc. (an actuarial, employee benefits administration and consulting company)
- 8 years with Towers Perrin (an actuarial and employee benefit consulting firm)
- 12 years as the Director of Compensation and Employee Benefits for a Fortune 500 company
- 5 years with New England life insurance company specializing as an actuary for retirement plans
- Master's Degree in Actuarial Science from Northeastern University
- Bachelor's Degree in Mathematics from St. John's University



*William E. Coffey, F.S.A.
Sogno Retirement Consulting
Services, Inc.*

MARCH MEMBERSHIP MIXER a SUCCESS

An enthusiastic crowd of more than 50 individuals came from far and wide, braving traffic and downtown parking to attend 2016's first Membership Mixer at the House of Blues on Wednesday, March 16. The doors officially opened from 5:30 p.m. and closed at 8 p.m., but attendees showed up early and a few were still going strong at 8:30. As hoped, folks reconnected with longtime friends and made the beginnings of new ones. With support from Fabiola Hoffman and her team, the House of Blues provided a splendid space and incredible food, as well as a generous sponsorship.

President Heather Whitley welcomed the crowd with warm greetings and good humor. As part of her remarks, Heather recognized members of long standing and those recently joined. Concluding her remarks, she passed the mic to the VP of Membership, Marshall Moore, who introduced members of the membership committee and made a special recognition of Emily Cabbage with our Executive Management Team for her great work and support from behind the scenes.

The opportunity drawing for two pairs of House of Blues concert tickets of your choice, (how great is that?!) were awarded to Ann Wilson and Miranda Watkins. \$100 off the price of a certification prep course was awarded to Erin Daiber. Before the night was through, several people took advantage of the evening's membership special and joined as new members. Many thanks to Marshall Moore and the Membership Team for organizing an outstanding event!



CA-Knowledge Bowl Questions

1. **Which of the following activities best prepares HR to participate in the strategic planning process?**
 - A. Evaluating a new HRIS system
 - B. Restructuring HR's recruiting system
 - C. Training line managers on interviewing techniques
 - D. Reviewing the company's key financial data

2. **Which of the following is true of short-term objectives?**
 - A. They create direction and synergy for the organization
 - B. They establish priorities for allocating resources
 - C. They must be created before unit strategies can be created
 - D. They take the place of action plans

3. **Strategic planning starts with an organization's:**
 - A. Mission statement
 - B. Environmental scan
 - C. Human resources inventory
 - D. Human resources audit

4. **Which of the following is true of a balance sheet?**
 - A. It includes transactions without a definite monetary value
 - B. It indicates the net income of the company
 - C. It summarizes an organization's assets, liabilities and equity
 - D. It measures the difference between the cost to produce a product and sale price

5. **A company commits to answering all phone calls within 15 seconds. Which operational concept deals with observing and documenting actual results?**
 - A. Capacity
 - B. Inventory
 - C. Scheduling
 - D. Control

6. **The primary purpose of a wellness program is to:**
 - A. Ensure employee privacy is protected
 - B. Prevent on the job accidents
 - C. Offer preventive care to employees
 - D. Secure savings on insurance premiums for employers

7. **Which of the following is the most effective way to control hazards and their negative consequences:**
 - A. Eliminate the hazard from the machine, method, material or plant
 - B. Control the hazard by enclosing it
 - C. Train personnel to be aware of the hazard
 - D. Require protective equipment to shield personnel against the hazard

8. **An HR manager who learns of a high level of cumulative trauma disorders among data entry personnel would most likely employ:**
 - A. An industrial engineer
 - B. An occupational therapist
 - C. An industrial hygienist
 - D. An ergonomist

Answers

1.D 2.B 3.A 4.C 5.D 6.C 7.A 8.B