

Contemporary HR Practices PER 2252

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(CUPA-HR)

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Agenda



Block 1:

- Introductions & welcome
- Framing and calling out some key challenges in higher ed HR:
 1. Public policy actions – federal and state oversight, focus, mandates, expectations, etc.
 2. Budgets and operations – the drive to meet current situation and build for the future
 3. Community, culture, and being “welcoming & inclusive”
 4. Talent – need to find it and the need to retain what you have
 5. Leadership in higher education – strategy, developing it, finding it, maintaining it
- Public policy & HR
- Budgets and operations

Block 2:

- Framing things by managing change effectively
- Community, culture and being welcoming & inclusive
- Talent
- Leadership in higher education
- What’s next? Starting your institutional action plan

Objectives

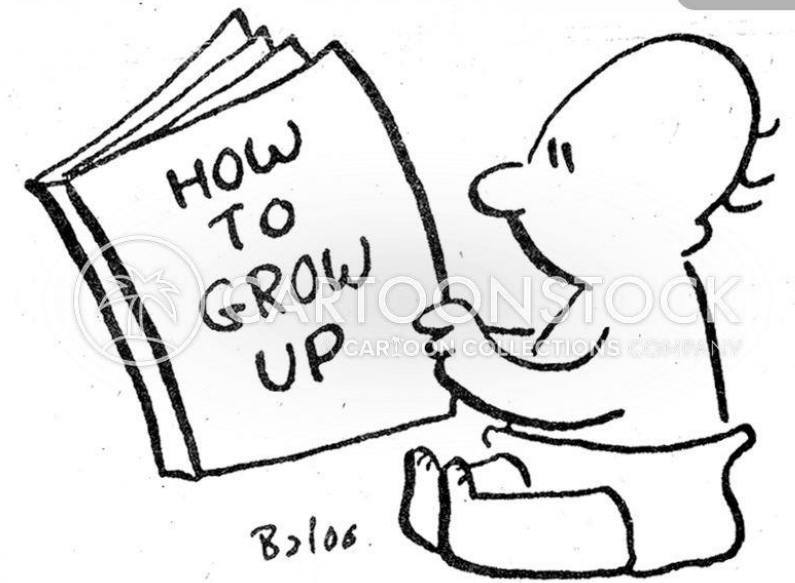


- Identify key challenges and trends in higher education HR.
- Identify issues between public and private institutions.
- Identify key policies, practices, & techniques impacted by HR.
- Identify the impact of operational excellence and budget challenges in higher ed HR.
- Identify the potential impact of technology on higher ed HR challenges.
- Identify the impact of talent, community, culture, and leadership on higher ed HR.
- Describe how to initiate an institutional HR plan.

When I was a kid, I wanted to work in HR when I grew up (not really), now that I am “more mature in my career” – how is HR doing? ...

Think about HR on your campus today:

1. What are the most important “things” that they do?
2. What do they do “best”?
3. What could they do “better”?
4. What “impacts” HR work on a campus?



Getting started



I identified 5 challenges to higher ed HR:

1. Public policy actions – federal and state oversight, focus, mandates, expectations, etc.
2. Budgets and operations – the drive to meet current situation and build for the future
3. Community, culture, and being “welcoming & inclusive”
4. Talent – need to find it and the need to retain what you have
5. Leadership in higher education – strategy, developing it, finding it, maintaining it

What do you think?
What did I miss?

Public policy – federal, state, institutional



In general, workplace policies should: (from CUPA-HR):

- Facilitate employer and employee adjustments to changes in the workplace as a result of technological developments, demographics, globalization, and national security needs.
- Support and encourage employer efforts to provide benefits that enhance employees' health and wellness, retirement security, job flexibility, skills development, work-life balance, recruitment and retention.
- Promote education and immigration policies that ensure the U.S. higher education system remains among the best in the world.
- Promote transparency, consistency, fairness, diversity, equity, access, inclusion and belonging.
- Involve stakeholders in the legislative and regulatory process.
- Promote laws, regulations, and guidance that are drafted in a manner that:
 - Are narrowly tailored to address specific identified problems, concerns or issues and avoids unintended consequences;
 - Facilitate understanding and compliance; and
 - Promote efficient processes.
- Make compliance information publicly available.

Public policy – federal, state, etc.

(continued)

Activity:

“What’s in your wallet?”

With a partner(s) – answer the following:

1. What specific executive orders/state mandates/etc. are providing the greatest challenge on your campus?
2. What has been your HR group’s role?
3. Are there “longer term” actions identified?

Be prepared to share with the larger group



HR policies, practices, & techniques: needed or are they a “pain”?



- Do you “need” any new policies? Why?
- Do you have an on-line policy manual?
- Do you have a consistent policy development model?
- Do you have a committee or a specific department/unit responsible for development?
- What is your approval process?
- Should you be a “policy lite” organization?
- How are policies “taught” and “communicated” in your organization/

Budgets and operations

- Budget process cycle
- Budget model utilized on your campus
- Participation, communication, presentation, approval
- Decision-making
- Day to day vs. strategic
- Do you know your "people costs"?
- What are the "best" strategies for cost savings? Why?
- Measuring concern for your institution's budget right now:
 1. Think we have a pretty good plan
 2. Have no clue how our institution is addressing it
 3. Little concerned
 4. Getting pretty anxious
 5. Having trouble sleeping at night
 6. Full blown panic?



Activity:

How well do you know your workforce?

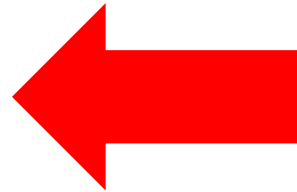
- Individually – think of your own campus:
 - Do you think you have the “right amount” of employees at your institution? How do you know?
 - Do you have “too many” open positions? How do you know?
 - How does it look 5 years from now?
- Sit with a couple of partners and compare thoughts.
- Any similarities? What did you hear that was unique?

The importance of analytics and workforce planning

- What HR data do you have available for your leadership to review? Include:
 - Accurate and up to date “snapshot” headcount data – at least a 3-year window.
 - Agree upon definitions – ex. Define “faculty” at your institution.
 - Connect to your payroll costing – follow the funding for all lines.
- Staffing ideas/planning – build some definitions to look at positions and NOT people – a suggested approach:
 - “Strategic”
 - “Core”
 - “Currently utilized”
 - Efficiencies, capabilities, capacities, workload, etc.
- Utilizing attrition strategically – a discipline to workforce planning.
- Should it always be “headcount reduction”?
- Strategy of “payroll reduction” – work through the value of experience for all hires

Element of workforce planning to impact the budget

- Staffing levels
- Forecasting and assessment
- Redeployment
- Position management
- Contingent employees
- Student employment
- Potential retirements
- Backfills



**Workforce planning
provides information and
preparation for these
things**

*Notice that none of these things are about a layoff/“artificial” reduction in force – strategy of **payroll reduction** and not headcount reduction.

HR information systems, technology, and AI

(more on that in a minute)

- The question of accurate people/workforce data: can you currently get it?
- The enterprise systems question: “1 big one” or use multiple solutions?
- Having a “people dashboard” available for all department leaders.
- Workflows and “employee self-service” and “manager self-service” – are you ready for it?
- Applicant tracking systems.
- The “talent management suite” question – do you need it?
- Learning management systems.
- AI HR applications currently being utilized include:
 - Generate job descriptions
 - Use for job applicant screening
 - Compiling survey data
 - Generating formulas for spreadsheet analysis
 - Presentations
 - Email generation
 - What else?

HR and AI

The **goal** should be to clearly and regularly communicate the importance of HR leading AI adoption and subsequent workforce transformation in at an institution. It can be accomplished through:

Awareness – helping build a foundation in AI essentials, fundamentals, increased understanding, tools, applications, etc.

Understanding – provide examples of AI can be used by HR – deepening HR's ability to evaluate and interpret - including why and which uses are effective and where risk might be for the institution.

Building confidence – Provide space to try tools, prompts, see real word results; encourage curiosity and imagination to explore.

Application – highlight specific use cases – and provide a space to share and learn.

Leadership – HR leaders clearly and frequently articulate AI adoption as a workforce issue – HR to lead/partner with IT, risk management, finance, etc.

What keeps you up at night about costs regarding healthcare and retirement? (benefits costs)

- Healthcare:
 - What are key challenges on your campus regarding healthcare costs?
 - What are things you are doing to lower costs?
 - Have you invested in wellness?
- What are you doing about retiree medical costs? Provide money and “send them to the market” (NY State Research Foundation)
- Retirement:
 - State pension plans: are they sustainable?
 - 403B/457F plans and your approach to executive compensation
 - Fiduciary responsibilities- do you have an investment committee?
 - What do you think about retirement incentive programs?
 - Do they work?
 - Are they strategic?
 - How could they be structured to gain an organizational advantage?



Block 2:

Change management

- There are many models to assist with managing change – is that possible?
- Would you like to integrate/embed this emphasis or provide a learning experience to be prepared?
- What if you prepared folks intentionally?
ALL THE TIME!!!
- Some models: (there are a ton!)
 - “Real Change Leaders” – Jon Katzenbach
 - “8 Step Process” – John Kotter
 - “Three Stages of Change” – Kurt Lewin
 - “ADKAR” model
 - Stephen Covey’s model (7 Habits)
 - Kubler-Ross model





Activity:

Culture – how is yours?

- Individually – think of your own institution.
- It has been said that there are “3 Cs” to having a great organizational culture:
 1. Communication
 2. Collaboration
 3. Community
- Identify 1-2 things you do well OR that you are very concerned with for each of the 3 areas. Be able to share your “why” for each example.
- Share with a partner.
- Be prepared to share with the larger group.

Community, culture, being welcoming and inclusive

“Culture eats strategy for breakfast”*.

(*“Allegedly” said by Peter Drucker 😊 - dig into it and most likely it was Steve Jobs or Jack Welch!)

- To be clear – it does not mean that strategy is unimportant.
- However, a powerful and empowering culture is a surer route to organizational success.
- CUPA-HR 2023 Employee Retention survey results (show results shared on web site)
- 2025 – we updated and did it again!

The criticality of a focus on an inclusive and respectful workplace:

- It is a value connected directly to your institutional mission.
- What is your responsibility as a leader within your administration?
- What is your individual comfort level with **leading** in this area?
- How can administrative leaders positively impact the work environment?



Activity:

Are you worried about recruitment and retention of talent at your institution?

- Individually – think of your own campus:
 - Do you have an overall recruitment and retention issues for talent?
 - How do you know – make short lists for both **recruitment** and **retention**?
 - Identify any areas/positions that you believe you have a tough time recruiting and retaining talent? Do you know why this is the case?
- Sit with a couple of partners and compare thoughts.
- Any similarities? What did you hear that was unique?

Guess we better try something new, right?

Recruitment strategies

The Indeed logo, consisting of the word "indeed" in white lowercase letters on a blue rectangular background.

- Applicant pools are getting smaller – check your data!
- Higher ed needs to move away from “post and pray”.
- Analyze all position postings – the “first 3 lines” view (from “indeed.com”).
- Understand how your talent management tools (applicant tracking) “work”.
- Should we “screen out” or “look closer”?
- Use the **“A”, “B”, “C”** approach!
- True recruitment NEEDS HR leadership/facilitation in the process.
- Everyone is a recruiter – even faculty!
- Understand the “cycles” and “calendar” of recruiting for specific role/positions.
- Know your markets for salaries – and where you are most competitive.
- **Our best future: early career professionals - we can train them AND we can afford them!**

The “1st year experience”

Retention strategies

- Taking a cue from our student affairs colleagues – from the time of an offer through their very first performance review/evaluation.
- What would be in the ideal onboarding experience?
- This is a process that is worth an investment – how to use technology (most applicant tracking systems offer a module) to “push” information to candidates – the 75% estimate.
- Making sure of health care eligibility/choice and retirement eligibility/choice.
- Face to face orientations: what should actually happen there?
- Creating multiple “touch points” during the first year.
- Administrative involvement in new faculty orientation – should we go there?
- This year is the number one factor to impact retention of highly sought after (and compensated!) talent at your institution.

Individual development plans: investing in your new people to turn them into “happy and challenged” employees

- Should be an annual process for all leaders with their direct reports.
- All employees should have individual development plans (IDPs) as part of their performance programs – a learning management process/system can be the center.
- Don’t focus on the evaluation – focus on the goals and the development plan.
- Key aspect around competencies (knowledge, skills, attribute/behaviors).
- Identify key development/learning experiences:
 - Workshops, conferences, certification courses, etc.
 - Key projects in functional areas – also cross-functional efforts.
 - Serve on committees, volunteer organizations, professional organizations (local, regional, national levels).

Activity:

Leadership development in higher education – how are we doing?

Who decided that you should attend CBMI?

Did **you** ask to attend or were you **asked** to attend?

1. What are the top 3 characteristics of a good leader? Why?
2. What is the best way to prepare future leaders? Why?



What tools could be utilized for leadership development?

- Structured programs:
 - Front level supervisors
 - Administrative leaders
 - Student employee supervision
 - Institutional leadership positions
- Mentoring:
 - Structured or unstructured?
 - Visibility to high potential/high performers
- 360 feedback processes
- Project work
- Interim assignments
- Professional development opportunities
- Incorporation into performance feedback

Things that no one tells you about being a leader

1. You will have to deliver hard news while protecting trust
2. You will sit with folks going through some of the toughest days of their lives
3. You will need to absorb emotion that was never yours
4. You will feel imposter syndrome
5. You will have to be the calm during chaos
6. You will lose people you fought to develop
7. You will be someone's reason to stay – or go
8. You will need to prioritize people over process
9. You will realize that trust is not given once
10. You will be remembered for how you made people feel



Higher ed could do succession planning, right?

- Having succession planning is “culturally” challenging – the search process is in our DNA!
- Every institution needs to think about what it mean for them:
 - Make sense or would it confuse things?
 - What are key roles/individuals that should be considered?
 - Do we “make or buy” a process to prepare individuals for leadership roles?
 - Do we have a way to determine “readiness” for individuals?
 - Have we invested in individual development planning?



Suggested “top 10” actions:

1. Develop a workforce/staffing plan – at least a 3-year look with attrition being your friend.
2. Build a people/HR dashboard capability.
3. Develop a wellness strategy to invest – build lower longer term health care costs.
4. Create an investment committee (faculty and staff) to manage your 403B plans.
5. Be a leader regarding your campus culture strategy.
6. Be a learning organization – all employees have individual development plans.
7. Develop a definition/policy structure regarding flexibility – it is for productivity and engagement and should NOT just be considered a benefit.
8. Develop a policy template – then a process to develop, review, approve, communicate.
9. Be the leader for leadership transparency – utilize multiple communication vehicles.
10. Build a look at talent management – balancing promotions and external searches.



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