Benchmarking Analysis
Purdue University Benchmarking

- General Inventory of Leaves
  - Compare Purdue's leaves against other universities
  - Chart leave gaps between Purdue and other institutions
- Administration of leaves
  - Which are paid or unpaid
  - Which have continued benefits
  - Centralized or decentralized leave administration
  - Insourcing vs. outsourcing
- Light LTD Benchmarking
  EP, who gets it, who pays

- Plan Design: amounts, rates of accumulation
  - Eligibility by employee groups
  - Eligibility Domestic Partner coverage
  - Vacation time
  - Sick Time or Leaves Available up to Disability
  - Who is moving to PTO programs instead of Sick/Vacation
- International leave programs/benefits
Purdue University
Benchmarking

Best in Class:

- Well defined and documented policies and programs
- Consistent application of policies
- Centralized reporting and administration
- University Specific:
  - Varying programs for Faculty
  - Use it or Lose it Sick Banks
  - Paid Parental Leave
  - Unpaid Personal Leave
  - Sabbaticals

©2013 Pacific Resources Benefits Advisors, LLC
<table>
<thead>
<tr>
<th>Brown</th>
<th>Ohio State</th>
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</thead>
<tbody>
<tr>
<td>CalTech</td>
<td>Penn State</td>
</tr>
<tr>
<td>Carnegie Mellon</td>
<td>Purdue</td>
</tr>
<tr>
<td>Cornell</td>
<td>Stanford</td>
</tr>
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<td>Dartmouth</td>
<td>University of California - Berkeley</td>
</tr>
<tr>
<td>Georgia Tech</td>
<td>University of Chicago</td>
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<td>Harvard</td>
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<tr>
<td>MIT</td>
<td>Yale</td>
</tr>
<tr>
<td>Northwestern</td>
<td>State of Indiana*</td>
</tr>
</tbody>
</table>
Leave Practices Benchmarking
Non-University Companies

Additional Employers, in the following industries, were also included in the Benchmarking for comparison of overall Leave Best Practices:

- State of Indiana
- Aerospace Defense
- Consumer Goods
- Energy
- Medical Technology
Best in Class Universities

- Carnegie Mellon
- Ohio State
- CalTech
- Harvard
- Yale
- Michigan State
- Dartmouth
- University of Minnesota
- MIT
- Georgia Tech

*Blue font denotes those who participated or will participate in Interviews*
Purdue University
Benchmarking – High Level Findings

Sick Leave

Purdue Plan:

• Accrued Sick Banks for all Staff, with varying accrual ranges for types of Employees
• Unlimited Carryover for unused time accrued
• For Clerical & Service Staff, can use time to supplement STD & unused time applied to creditable service for retirement
• For Faculty and AP Staff, unused time is forfeited at termination
• Upon STD benefit begin date, sick leave is not required. 65% is STD benefit, and can draw from sick leave to supplement to 100%.
• If an employee is eligible for LTD benefits at 13 weeks and has accrued leave, they will receive 100% of sick leave pay and a $50 LTD benefit until 26 weeks, at which point LTD is 65% and the employee can use sick leave to supplement up to 100% until accrual is used
• If a holiday occurs while on sick leave, the holiday will be paid and not charged to sick hours
• Purdue continues to pay Employer portion of health benefits and Employee cost is deducted from pay

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Purdue University
Benchmarking – High Level Findings

Sick Leave

- **Industry Best Practice:**
  - 80% of Universities offer an accrued Sick Plan between 10-66 days accrued annually
  - Varying programs for non exempt and exempt staff
  - Sick Leave carryover is most common, as well as use of time to supplement STD, with limits that vary from unlimited to 30 days to 192 days, per interviews
  - Only 2 schools allow for time to be cashed out at termination or retirement

- **Non- University Best Practice:**
  - 30% of companies have a combined vacation/sick bank through PTO programs
  - The other 70% offer between 5-10 days of sick time annually and do not carryover unused time (use it or lose it)

- **How does Purdue Stack up against Best Practices?**
  - Cashing in or credits towards retirement option is unique
  - Amount of hours allowed at carryover is on the higher end of the spectrum
  - Sick leave accruals with option of an STD plan is generous
  - Continuous service date is not a standard
Purdue University
Benchmarking – High Level Findings

Vacation

- **Purdue Plan:**
  - Clerical & Service Staff- years of service accrual of time
    - 10 days from Date of Hire to 1 year; 1 additional day until 11 + years (max of 20 days)
    - Carryover allowed up to 320 hours
  - A/P Staff- accrues 15 days, 1st year, then up to 22 days each year after
    - Accruals cannot exceed 44 days
  - Faculty- Academic Staff- none; Fiscal Staff- accrue 22 days each year of service
Purdue University
Benchmarking – High Level Findings

Vacation

- **Industry Best Practice:**
  - Clerical Staff accrual programs 10-15 days (confirmed through interviews)
  - Professional Staff and Fiscal Year Faculty- 21-22 days (confirmed through interviews)
  - Carryover is an option, with limitations on number of days (Per interviews this can vary from 40-240 hours)
  - 50% of Universities do not offer Faculty vacation time
  - 3 of the 25 Universities have same vacation policy for all employees

- **Non-University Best Practice:**
  - 10 days of vacation earned after 1 year of service
  - Tenured policies with increase in number of days after 5-7 years, 10-15, years, etc.
  - Carryover allowed, but typically only 5-7 days
Purdue University
Benchmarking – High Level Findings

Vacation

- **How does Purdue Stack up against Best Practices?**
  - Accrual programs are common across industry
  - Carryover limits generally more stringent than current offering
  - Within University specific programs, the current plan is competitive
  - For Academic Staff- no vacation time is common place
  - Unused vacation is payable upon termination
Unpaid Personal Leave

- Purdue Plan:
  - Clerical & Service Staff- Eligible after 90 days of service
    - Accrue 44 days in 1st year; After 1 year, accrual is 22 days annually to a max of 132 days
    - Vacation needs to be exhausted prior to using this leave
  - Faculty & Professional Staff- Duration up to 1 year; requires departmental approval for less than 22 days; Additional approvals for more than 22 days
  - Runs concurrent with FMLA
Purdue University
Benchmarking – High Level Findings

Unpaid Personal Leave

- **Industry Best Practice:**
  - Most Universities offer a Personal Leave which is unpaid for either medical or professional reasons
  - Varying programs for Faculty and Other Staff
  - Some require 3-12 months of service prior to eligibility
  - Faculty Leaves/Professional Leaves do require approval of Dean/Provost at all Universities that offer and tend to be 1-2 years in duration (confirmed via interviews)

- **Non-University Best Practice:**
  - 100% of Companies offer a Personal Leave which is unpaid
  - Duration ranges from 30 days to 1 year
  - All run concurrent with FMLA, but after FMLA time ends, Personal Leaves do not offer job protection

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Purdue University
Benchmarking – High Level Findings

Unpaid Personal Leave

- How does Purdue Stack up against Best Practices?
  - Consistent with other Universities overall
  - Some variance to the amount of time offered to Clerical & Support Staff
  - Based on interviews, all Universities see Personal Leaves as a hot topic and an important part of their Leave Programs, specifically among Faculty who take advantage of the Professional Leave programs
Purdue University
Benchmarking – High Level Findings

Paid Parental Leave

- Purdue Plan:
  - Used for birth or adoption, must have 12 months of continuous service
  - Birth mother receives up to 6 weeks; all others receive up to 3 weeks
  - Runs concurrent with FMLA
  - May be used in addition with other paid leaves
  - Does not reduce vacation or sick time & can be “stacked”
  - Must commence within 12 months of birth/adoption
  - If both parents are employees of the University, they can combine their time; No person can take more than 6 weeks
  - Eligibility for Leave- 1 year of service
Purdue University
Benchmarking – High Level Findings

Paid Parental Leave

- **Industry Best Practice:**
  - 60% of Universities offer a Paid Parental Leave
  - Of the 15 that do offer this leave, 9 offer to Faculty Members only
  - 27% (4) offer the same allotment of time (6 weeks) to both parents
  - One University offers the exact same Plan as Purdue
  - Other variations of time and pay are also present in the Benchmarking (see appendix slides 49 & 50 for details)

- **Non-University Best Practice:**
  - Most Companies do not offer Paid Parental Leave
  - Duration for those that do offer ranges from 6-12 weeks
Purdue University
Benchmarking – High Level Findings

Paid Parental Leave

- **How does Purdue Stack up against Best Practices?**
  - Consistent with University offers
  - Interviewed Universities confirmed the usage and value of these programs, specifically with the Faculty staff
  - Stacking is generous, allowing for this leave in addition to sick leave and vacation time
  - Increasing trend toward allowing parental leave equally for adoption/birth and fathers, as well as domestic partners
Purdue University
Benchmarking – High Level Findings

Personal Holidays/Personal Business Days

- **Purdue Plan:**
  - 10 paid Holidays offered, as well as 1 paid personal holiday for Staff; 3 paid personal business days for Faculty and Admin Staff
  - Personal holiday is paid out if not used, but lost at end of fiscal year

- **Industry Best Practice:**
  - 9-12 Holidays offered (based on major holiday schedules)
  - About half the Universities allow for 1-2 Personal Holidays, use it or lose it programs
  - Some Universities allow for personal days to be used, but count against Sick Time Allotment

- **Non-University Best Practice:**
  - 8-14 Holidays offered
  - Additional Personal or Floating Days less common
Purdue University
Benchmarking – High Level Findings

Personal Holidays/Personal Business Days

• **How does Purdue Stack up against Best Practices?**
  • Personal holiday is consistent with universities and somewhat outside industry
  • Personal holiday being paid out on termination is unique
  • Personal business day allotment is generous
  • Personal days not defined as only for “business” reasons generally
Purdue University
Benchmarking – High Level Findings

Sabbaticals

- **Purdue Plan:**
  - Tenured Staff Only Eligible
  - Years of service/Semesters of service dictate time and pay
  - Academic Staff- After 6 semesters, 1 semester ½ pay; after 12 semesters, 1 semester full pay and 2 at ½ pay
  - Fiscal Staff- After 3 years of service, 6 months at ½ pay; after 6 years of service, 6 months at full pay and 1 year at ½ pay

- **Industry Best Practice:**
  - 15 of the 24 Universities offer Sabbaticals (63%)
  - 33% of those are Unpaid programs
  - Half require the Staff to be Tenured; However, those identified as Best in Class all required Faculty to be tenured
  - When paid most common approach is full pay for 6 months and ½ pay for 1 year

- **Non- University Best Practice:**
  - Under personal leave for education, research etc.
Purdue University
Benchmarking – High Level Findings

Sabbaticals

- **How does Purdue Stack up against Best Practices?**
  - Consistent with Best in Class Universities
  - During interviews we obtained confirmation that all those who participated tracked Sabbaticals only. The application and approval processes were handled by Provost, Office of Academic Affairs, etc.
Purdue University
Benchmarking – High Level Findings

Bereavement

- **Purdue Plan:**
  - Paid time off
  - Immediate Relatives and Relatives Living in Employee’s Home: 3 working days over 5 consecutive days
  - Relative’s relative: one workday
  - Fellow Employee: one half workday to attend funeral

- **Industry Best Practice:**
  - Paid time off, allotting for between 1-5 days depending on relationship
  - “Living in Employee’s home” does not appear in definitions
  - 21% of Universities use this time from sick/vaca time

- **Non-University Best Practice:**
  - Similar to University policies
  - 1-5 day allotments depending on relationship
Purdue University
Benchmarking – High Level Findings

Bereavement

- How does Purdue Stack up against Best Practices?
  - Consistent with Best in Class Universities, except for "living in the employee's home" language
  - Allotment seems consistent as well, but some Non University Employers allow for the time to be taken non consecutively and/or over a 6 month period of time
Purdue University
Benchmarking – High Level Findings

Miscellaneous Leaves

- **Purdue Plan:**
  - **Jury Duty:** Unlimited paid time for jury and court appearances; No offset to pay received
  - **Military Leave:** 15 days of paid leave - leave exceeding 15 workdays in a calendar year will be unpaid. Employee has the ability to accumulate leave time under other programs while on Military leave
  - **Holidays:** 10 Paid holidays - in addition to 1 paid personal holiday for Staff and 3 paid personal holidays for Faculty/Admin Professionals.
Purdue University
Benchmarking – High Level Findings

Miscellaneous Leaves

- **Industry Best Practice:**
  - **Jury Duty:** All offer as paid time off. 33% of the Best in Class Universities offset pay after either 7 or 10 days of duty.
  - **Military Leave:** Most offer similar program to Purdue. Less than 15% offer a longer paid duration (30 or 90 days)
  - **Holidays:** 9-12 Holidays are typical and ½ allow for 1-2 personal days as part of the total allotment

- **Non-University Best Practice:**
  - **Jury Duty:** All offer as paid time. May offset after 10 working days on duty
  - **Military Leave:** Most offer similar program to Purdue
  - **Holidays:** 8-14 are typical, based on major holiday schedule
Miscellaneous Leaves

- How does Purdue Stack up against Best Practices?
  - **Jury Duty:** A small percentage of Employers offer paid time off but with a limit (7 or 10 working days, and then offset pay received from Jury Duty)
  - **Military Leave:** Consistent with Industry and Non Industry Practices, with the exception that few Employers offer a longer duration of paid time.
  - **Holidays:** Richer offering when considering personal and business holidays
Benchmarking
Short Term Disability – Plan Elimination Period (EP)

- Purdue offers STD to Clerical and Service Staff only.
- 21 day Elimination Period

Pie chart showing:
- 7 days: 53%
- 14 days: 20%
- 30 days: 7%
- 21 days: 7%
- All Other: 13%
Benchmarking
Short Term Disability - Duration and Benefit

Plan Duration:

- 1 year (10%)
- 13 weeks (30%)
- 26 weeks (60%)

Plan Benefit %:
- Range is 60% to 100%.
- Most common income replacement percentage is 60%
- Purdue is 65%

*Some plans have less than 13 week duration, but when you consider the EP, it is a 13 day disability duration period, and dove tails into a 90 day LTD plan.
Benchmarking
Long Term Disability – Benefit Percentage

- All benchmarked universities offer LTD.
- Most common benefit is 60%.
- Mix of 90 and 180 day elimination periods, and some schools offer both options for employee selection.
- Purdue's plan is unique in the grouping in that some classes of employees have a 90 day EP and others have 180 EP.
Appendix
Appendices

- Appendix A – University Benchmarking Details
- Appendix B – University Benchmarking Comparison of Phase I & II Results
- Appendix C – Non-University Benchmarking Data
- Appendix D – Leave Management Considerations
Appendix A: Purdue University Benchmarking – Personal Leaves Overview

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<th>YES</th>
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<tr>
<td>Military (beyond legal requirement)</td>
<td>11</td>
<td>14</td>
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<td>National Guard/Emergency Duty</td>
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<td>23</td>
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<tr>
<td>Military Family Leave (beyond legal requirement</td>
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<tr>
<td>Selective Service &amp; Military Physical</td>
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<td>23</td>
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<tr>
<td>Victims of Crime</td>
<td>4</td>
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### Appendix A: Purdue University Benchmarking – Personal Leaves Overview

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<td>9</td>
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<tr>
<td>Personal Leave</td>
<td>23</td>
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<td>Yes (unpaid)</td>
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<tr>
<td>(Paid by 5)</td>
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<td>Disaster Leave</td>
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<td>Public Service/Elected Official</td>
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<td>Bereavement</td>
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<td>Organ &amp;/or Bone Marrow Donation</td>
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<td>16</td>
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<tr>
<td>Blood Donation</td>
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<td>20</td>
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</tr>
<tr>
<td>School Conferences</td>
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<td>19</td>
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<tr>
<td>Jury Duty</td>
<td>25</td>
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</table>
## Appendix A: Purdue University Benchmarking – Business Leaves Overview

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<tr>
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<th>YES</th>
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<tbody>
<tr>
<td>Sabbatical (unpaid leave for 5)</td>
<td>15</td>
<td>9</td>
<td>Yes</td>
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<tr>
<td>Faculty Professional Development or Research (non sabbatical)</td>
<td>15</td>
<td>9</td>
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<tr>
<td>Outside Activity Leave</td>
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<tr>
<td>Change in Duty Station</td>
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<td>Yes</td>
</tr>
<tr>
<td>International Leaves</td>
<td>0</td>
<td>25</td>
<td>Yes*</td>
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</tbody>
</table>

*While Purdue has stated they have International Leave such as Rest and Recuperation which are offered to International Employees, we were not able to review that policy.*
Appendix A: Purdue University Benchmarking – High Level Findings

Sick Time

- No policy
- Set number of days or accumulate based on tenure.
- Range = 10 - 66 days per year
- Mode = 12 days per year

- Long duration
- 2 – up the 3 months
- 3 – up to 6 months
Appendix A: Purdue University Benchmarking – High Level Findings

Vacation Time

- 40% of Universities do not offer any Faculty vacation time.

- Only 3 of the 25 Universities have the same vacation policy for all employee populations (Carnegie Mellon, MIT and University of Iowa). Others combine Faculty and Professional staff, or exempt/non exempt vs. clerical/technical/support service or civil service employees.

- Accrual based with the option to carry forward within limits.

- How much is most common per year?
  - Clerical Service is 10-15 days:
    Purdue new hires get 10 days (additional day for each year of service)
  - Professional staff/12 mo. Faculty is 21-22 days:
    Purdue new hires get 15 – 22 days
Appendix A: Purdue University Benchmarking – High Level Findings

Military Leave

**PURDUE**

- FMLA requires leave time for Military Leave, but does not require pay.
- The majority of universities reviewed continue pay 10-18 days (Purdue = 15 paid days)
Appendix A: Purdue University Benchmarking – High Level Findings

Paid Parental Leave

10 – Unpaid leave

15 – Paid leave (9 paid for faculty only)

- FMLA requires parental leave time, but does not require pay.

- Purdue allows up to 240 hours of paid leave time (30 work days) for the birth mother and 120 hours for others. Applies to all benefit eligible employees.
Appendix A: Purdue University Benchmarking – High Level Findings

Paid Parental Leave

- 6 Weeks to Both
- 6 Weeks to Mother
- 4 Weeks @ Partial Pay
- 2 Weeks
- 1 Semester
- Use Sick Time
- Matches Purdue

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Purdue University
Benchmarking – High Level Findings

Sabbaticals

15 offer Sabbaticals (5 unpaid)
9 Do not offer

- 7 Universities limit sabbaticals to tenured faculty only. Others allow faculty on full time appointments or assistant professors or higher ranking.

- Most common approach is 6 months sabbatical at full pay or 12 months at 50% pay. Purdue follows this model with 1 semester at full pay or 2 semesters at half pay.

- Three universities (Carnegie Mellon, Georgia Institute of Technology and University of Texas) do not use the term “Sabbatical” but do offer both paid and unpaid professional development leaves for faculty.
Appendix A: Purdue University Benchmarking – High Level Findings

Unpaid Personal Leave

- All universities except one allow for unpaid personal leaves.

- Purdue allows:
  - Clerical/Service Staff (after 90 days of employment) 44 days in year 1. After year 1 accrual is 22 days annually, to a max of 132 days.
  - Faculty, Administrative and Professional Staff – up to one year.

- Other universities’ policies vary, but several offer between 5 months to one year for faculty and professional staff, and as little as 24 hours for clerical/support staff.
**Appendix B: Purdue University Phase I Benchmarking - Updated Results**

Significant Changes (10% +/-) from Initial Benchmark Results:

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<th></th>
<th>YES</th>
<th>NO</th>
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<tbody>
<tr>
<td>Parental (beyond FMLA)</td>
<td>16 – 64%</td>
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<td>Yes</td>
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<tr>
<td></td>
<td>(9 – 75%)</td>
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<td>Voting Leave</td>
<td>10 – 40%</td>
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</tr>
<tr>
<td></td>
<td>(3 – 25%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organ &amp;/or Bone Marrow Donation</td>
<td>9 – 36%</td>
<td>16</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>(6 – 50%)</td>
<td></td>
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</table>

**Note:**
Initial – 12 organizations
Revised – 25 organizations
Appendix B: Purdue University Phase I Benchmarking - Updated Results

Other Programs:

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<tr>
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<th>Previous Results</th>
<th>Updated Results</th>
<th>Purdue</th>
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<td><strong>Sick Leave</strong></td>
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<td></td>
<td>Higher end of average time allocated (Mode is 12 days)</td>
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<tr>
<td>Range = 10 – 66 days / year</td>
<td>50%</td>
<td>60%</td>
<td></td>
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<tr>
<td><strong>Vacation Time – Not offered to Faculty</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>25% No Faculty</td>
<td>40% No Faculty</td>
<td></td>
</tr>
<tr>
<td></td>
<td>16% Same all pop.</td>
<td>12% Same all pop.</td>
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</tr>
<tr>
<td><strong>Vacation Time Allotted</strong></td>
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<tr>
<td></td>
<td>Clerical Service is 10-15 days</td>
<td></td>
<td>Clerical Service: 10 days (+1/yr.)</td>
</tr>
<tr>
<td></td>
<td>Professional/Faculty is 21-22 days</td>
<td></td>
<td>Professional/Faculty: 21-22 days</td>
</tr>
<tr>
<td><strong>Military Leave – Paid</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Range 10-18 days</td>
<td>67%</td>
<td>64%</td>
<td>Number of days is now mid-range (previously lower at range of 15-18)</td>
</tr>
<tr>
<td><strong>Paid Parental Leave</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>58%</td>
<td>60%</td>
<td>Purdue still has average to above average plan</td>
</tr>
<tr>
<td><strong>Sabbaticals or Other Professional Leave</strong></td>
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<td></td>
<td>Purdue follows most common model</td>
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<td></td>
<td>82%</td>
<td>62%</td>
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<td><strong>Unpaid Personal Leaves</strong></td>
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<td>Purdue is in average</td>
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<td></td>
<td>92%</td>
<td>96%</td>
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### Appendix C: Purdue University Benchmarking – Personal Leaves Overview of Non-University Employers

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<tbody>
<tr>
<td>Military (beyond legal requirement)</td>
<td>5</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>National Guard/Emergency Duty</td>
<td>0</td>
<td>5</td>
<td>No</td>
</tr>
<tr>
<td>Military Family Leave (beyond legal requirement)</td>
<td>0</td>
<td>5</td>
<td>No</td>
</tr>
<tr>
<td>Selective Service &amp; Military Physical</td>
<td>0</td>
<td>5</td>
<td>No</td>
</tr>
<tr>
<td>Victims of Crime</td>
<td>0</td>
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<td>No</td>
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Appendix C: Purdue University Benchmarking – Personal Leaves Overview of Non-University Employers

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>YES</th>
<th>NO</th>
<th>Offered by Purdue</th>
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<tr>
<td>Parental (beyond FMLA)</td>
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<tr>
<td>Personal Leave</td>
<td>5</td>
<td>0</td>
<td>Yes (unpaid)</td>
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<tr>
<td>Disaster Leave</td>
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<tr>
<td>Voting Leave</td>
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<td>Public Service/Elected Official</td>
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<tr>
<td>Bereavement</td>
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<td>Organ &amp;/or Bone Marrow Donation</td>
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<td>School Conferences</td>
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<td>Jury Duty</td>
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