



September 17, 2026 Meeting

Agenda



01

Welcome

Special Guest
President Peter
Rodriguez

02

HR & Fidelity

Mary Lucal, WFU
Human Resources
Jan Myers, WFU
Human Resources
Roger Melton,
Fidelity
Jim Strodel,
CAPTRUST

03

Introduction to Wayhaven

Warrenetta Mann,
Health and
Wellbeing

04

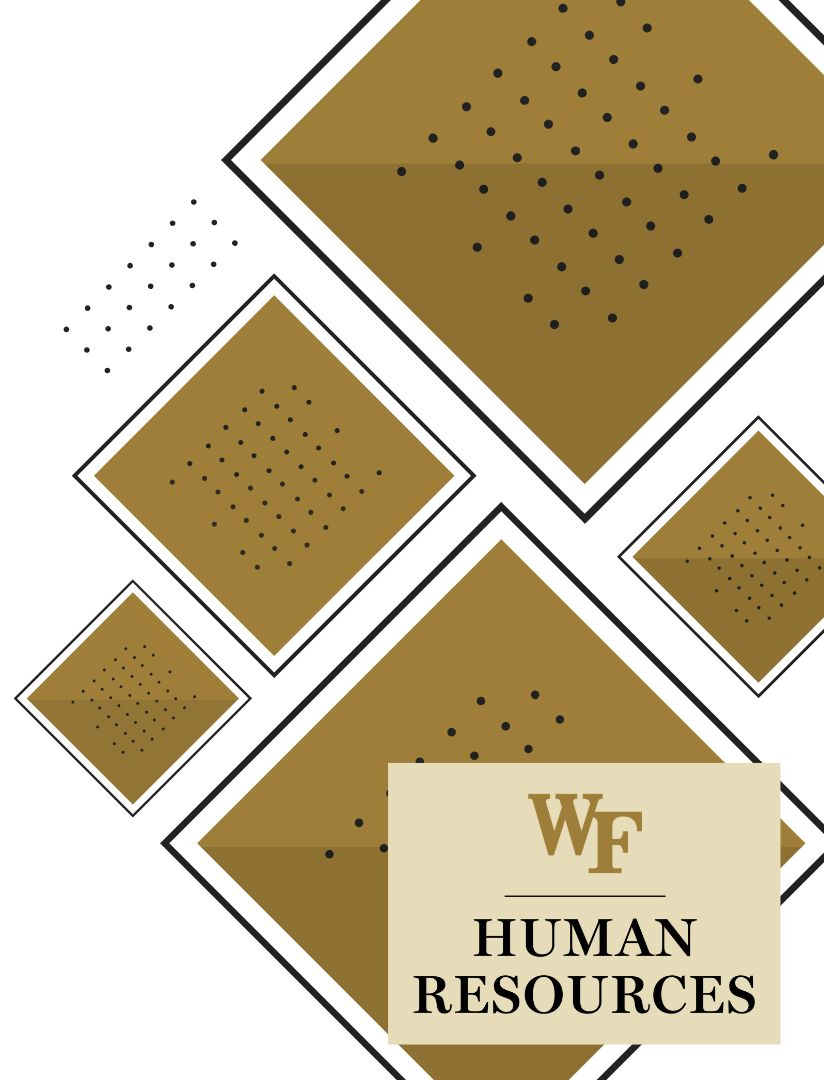
What is SAC

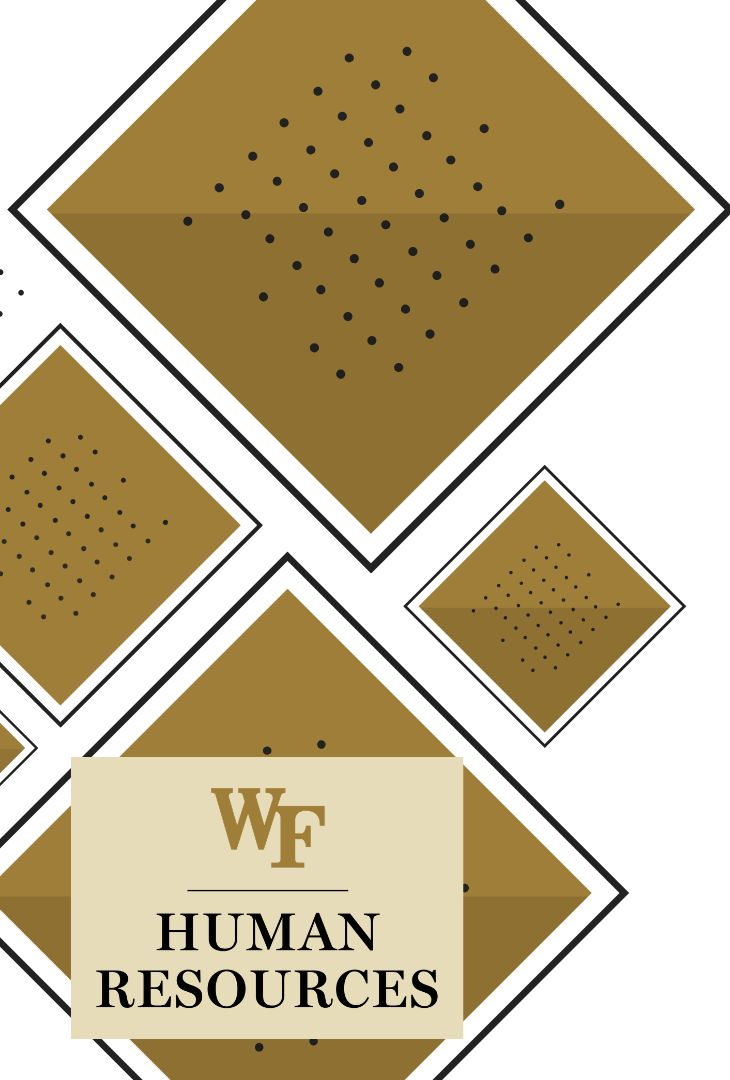
An introduction to
the Staff Advisory
Council, outlining
our mission, goals,
and advocacy for
the university staff
community.

SAC Committee
Reports

Fall '26 Update

Wake Forest Transition to





Today's Agenda

1. The Transition to Fidelity
2. Overview of 403(b) Plan
3. Timeline and Important Dates
4. Communication Channels
5. Where to Find Assistance
6. CAPTRUST
7. 3 Steps to Take Now
8. Thank You and Q&A



**HUMAN
RESOURCES**

The Transition to Fidelity

- **New administrator:** In Spring 2026, WFU's Retirement Plan Committee selected Fidelity Investments as the plan's new administrative service provider following a competitive evaluation process.
- **Key advantages:** Fidelity stood out for its robust data security, industry-leading technology, customer support, and competitive administrative costs.
- **Fall focus:** We are updating campus stakeholders this fall to ensure the University is prepared for a smooth launch in January.

Overview of 403(b) Plan

- **What is not changing as we transition to Fidelity in January:**
 - Employer contributions
 - Access to CAPTRUST
- **What is changing:**
 - Fidelity Investments will become the retirement plan's provider of recordkeeping services and custodian for WFU, replacing TIAA.
 - Employees will manage their WFU retirement accounts through Fidelity going forward, except for select investments remaining with TIAA. Details on specific fund updates will be provided in the Transition Guide.

Timeline and Important Dates

- **Week of Sept. 13, 2026:** Transition Guide publishes
- **Jan. 4, 2027:** Quiet Period (QP) begins.
 - While account transactions are paused during the QP, your regular contributions will continue as scheduled.
 - This transition period is for data transfer, reconciliation, and final testing.
- **Feb. 5, 2027:** Last possible date of QP; may end earlier.

Communication Channels

- **Transition Guide:**

- Electronic version emailed to current employees, posted on website.
- Mailed via USPS to retirees and terminated employees with an account balance.
- Spanish language version posted on transition website.

- **WFU Event Participation:**

- Fidelity and CAPTRUST presence at Sept., Oct. Retiree Gatherings
- Fidelity and CAPTRUST at Sept. and Oct. SAC and Sept. Faculty Senate Executive Committee meetings

- **Fidelity Information Sessions (same content at all):**

- On-campus and virtual information sessions with Fidelity

Where to Find Assistance

- **Available now:** Virtual or in-person 1:1 appointments with CAPTRUST
- **Beginning Sept. 22:**
 - In-person and virtual sessions with Fidelity
 - Opportunities for in-person, drop-in “office hours” with Fidelity
 - Language Line: Fidelity’s multilingual helpline offering participant support from native speakers
- **Ongoing assistance after the QP ends:** Virtual or in-person 1:1 appointments with CAPTRUST Financial Advisors and with Fidelity Workplace Consultants

CAPTRUST

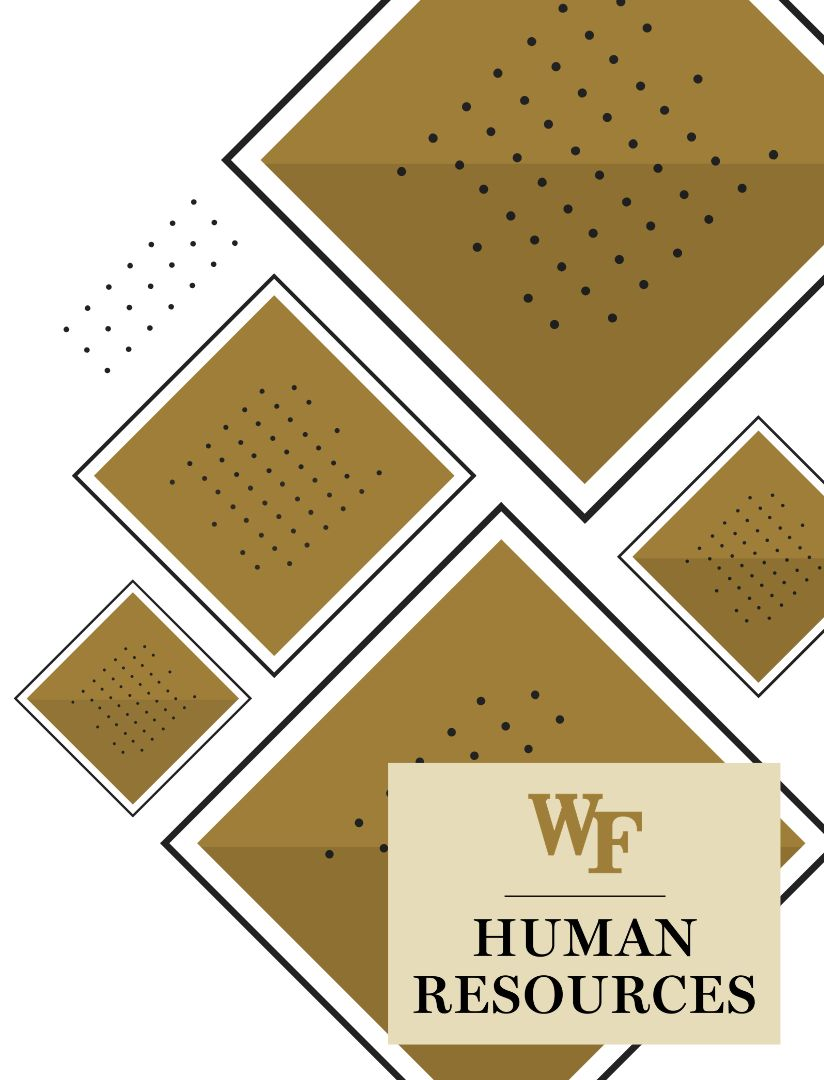
- Wake Forest plan participants may contact CAPTRUST, an independent fiduciary advisor, for personalized retirement planning advice. CAPTRUST's financial experts are available to answer questions and help participants optimize retirement plan benefits.
- In-person and virtual appointments are now available with CAPTRUST's Senior Financial Advisor, Matt Leggett, in October. November and December appointments will be released later this year.
- Virtual 1:1 appointments can be scheduled with a CAPTRUST Financial Advisor by visiting <https://www.captrustatwork.com/> or calling 800.967.9948.

3 Steps to Take Now

- Review your personal information and update your **beneficiary designation(s)** and **home address** with TIAA at <https://www.tiaa.org/public/tcm/wfu>.
- Watch for an **email from Fidelity** during the week of Sept. 13 with a link to the **Transition Guide**.
- Visit the **transition website** for more information. The transition website will be updated with additional transition details during the week of September 13.



Thank You



Additional Questions?



Share Your Voice



Scan the QR code or visit:

<https://forms.gle/Nod3Km7poA6LviZD6>

*Note: Submissions are completely anonymous unless
respondents choose to leave their name*



WAKE FOREST'S AI CARE CONCIERGE: BUILT WITH STUDENT WELLBEING IN MIND



Connection, Resources & Support — Anytime

We Are Wake is partnering with Wayhaven to give students another way to find connection, resources and support — anytime.

Wayhaven was designed with licensed clinical psychologists and developed with input from Wake Forest students.

The 24/7 Care Concierge is an **additional path** into Wake Forest's network of care — not a replacement for 336-758-CARE or the people and services that are here to support our students.

The 24/7 Care Concierge
is live at we.wfu.edu.

Scan to Connect
Access Wayhaven App



What is the Staff Advisory Council?



Established in 2006, the Staff Advisory Council (SAC) is an elected body that represents staff interests at Wake Forest. The SAC:

- **Conveys** the ideas, concerns, and suggestions of staff to the university administration
- **Advises** senior leadership on staff-related issues
- **Advocates** for staff interests on university committees
- **Creates opportunities** to celebrate staff and deepen the sense of community among all university members
- **SAC's Cabinet Liaison** is Jackie Travisano, Executive Vice President and Chief Financial Officer

SAC Representation on Campus Committees



Capital Projects Advisory Committee
Ashley Graham Phipps, Erin Schneller

Retirement Planning
Betsy Chapman

Faculty Senate
Shell Sizemore

Tree Advisory Committee
Kathleen Hurley

Parking & Transportation Advisory
Amanda Tingle

University Priorities Committee (UPC)
Betsy Chapman

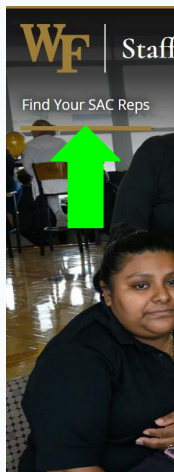
Professional Development Committee
Jenna Radford

Active Advocacy: SAC members represent staff interests on university committees to proactively influence campus decisions.

How can I connect with the SAC?



Our SAC members are wearing SAC lanyards at this meeting so you know who they are. Or on sac.wfu.edu, choose Find Your Reps at the top left of the screen



Find Your SAC Reps

Staff Advisory Council Representatives

Select your area to find your elected representatives.

SAC Executive Committee President, Vice President, Standing Committee Chairs, and appointed HR rep	Academic Schools The Undergraduate College, Graduate School, School of Business, School of Divinity, School of Law, and School of Professional Studies	Administration Finance, Human Resources, Sustainability, and Information Systems
Advancement & Enrollment University Advancement, University Marketing and Communications, Enrollment, and Legal	Athletics All departments and offices within Athletics	Campus Life All departments and offices within Campus Life
Facilities, Campus, & Auxiliary Services Facilities, Real Estate & Planning, Hospitality & Auxiliary Services	President's Office All departments and offices reporting to the Office of the President	Provost All departments and offices reporting to the Office of the Provost, Innovation and Career Development, and ZSR Library



How can I connect with the SAC?



Scroll to Share Your Voice and complete the form (anonymous)

Share Your Voice

Do you have SAC meeting topic suggestions? What are you hearing across campus? Share staff insights, concerns, and successes, and help the SAC shape future discussions and advocacy goals by providing feedback on this anonymous form.

Share your voice

Or email us at **sac@wfu.edu**

Share Your Voice



Campus Feedback

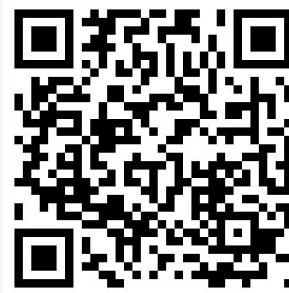
What are you hearing across campus?
Share staff insights, concerns, and successes.



Meeting Topics

Do you have meeting topic suggestions?
Help shape our future discussions and advocacy goals.

Share Your Voice - *anonymous*



Scan the QR code or visit:

<https://forms.gle/Nod3Km7poA6LviZD6>

Note: Submissions are completely anonymous unless respondents choose to include their name



Committee Updates

Staff Advisory Council

Communications



Chair: Jenna Radford (Wake Washington)

Members: Sydney Bowman (Program for Leadership & Character), Paige Edwards-Werhan (Human Resources), Emily Gregg (Information Systems), Ken Knox (Athletics), Chris Logan (Facilities, Real Estate & Planning)

What We Do:

- Maintain the SAC website
- Promote events & provide information to staff via the SAC eNewsletter
- Assist SAC committees with promoting their projects

Events



The SAC Events Committee consists of the following members for the 2026-2027 school year

Co Chairs: Krista Davis, Sabrina Mack, and Shandra Caputo

Members: Christa Doolittle, Jessica Koehler, Kathleen Hurley, Rachel Hayes, Tim Kerr, Tabatha Renegar, Marisa Hancock-Hernandez, Allison Hunter, Erin Schneller

The SAC Events Committee has already begun planning the SAC Staff Appreciation Picnic being held next Spring.

Do you have any fun ideas you would like to see implemented for the SAC Picnic? You can email us at sac-events-connect@wfu.edu

We would love to hear from you!

Fringe Benefits



Updates

Bids are coming in from vendors. As with all things insurance and medical-related, costs are skyrocketing.

These slides aren't the greatest news, but represent lower increases by percentage than many private businesses and most postsecondary education.

Good news: Flu and MMR vaccination clinic 9/30 through 10/13. FREE! Protect your health!

Fringe Benefits



Updates

Good news: Mobile Mammography, 10/12. FREE!

Good news: New benefit 1/1/27: Discount and perks programs with a national vendor for many purchases, services, companies. Nationwide benefits and opportunities for everyone, online, no costs.

Fringe Benefits

Updates

Human Resources is actively tracking our medical (physical, prescription, mental) costs:

- Costs for last fiscal year were \$2M over budget
- Costs this year are continuing to increase
 - Medical and pharmacy alone: 9%-12% increases from last year
- Best cost management: Change providers to Atrium Wake Forest Baptist
 - Novant, Cone, etc. are much higher cost. Work with HR if you need AWFBH referral for Primary Care, Specialist, etc.

Fringe Benefits

Updates

Cost evaluations will continue and co-pays, deductible, and more will increase for 2027-2028. HR will provide updates and SAC will push to keep those costs down, especially for our lowest-compensated employees.

Dental plan bids are in and will increase 5% in January.

FSA: Health Care FSA max up \$100 for health care; others same

Life Insurance vendor changing from NY Life to Unum.

Fringe Benefits



Vendor Change: Retirement

The change from TIAA-CREF to Fidelity is coming!

- Transition guide was sent out via email Tuesday 9/15
- Work with CAPTRUST for virtual or in-person appointment
- Fidelity sessions (specific to your retirement funds) start next week

Fringe Benefits



Benefits Fair

October 13, 2026: Noon - 3pm, Sutton Center

Many additional benefit assistance sessions, 10/13 through 10/22.

Free stuff, great advice, information on your benefits and how to maximize.

Fringe Benefits committee will keep you informed on changes, costs, and wants your input and requests!

Membership

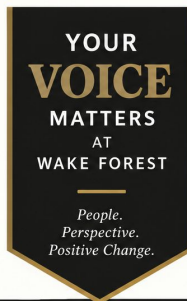


We're Still Looking for Representatives!

Help make a difference and shape the staff experience at Wake Forest.

Open Representative Opportunities:

- **Area 1:** Academics
- **Area 3:** Advancement, Enrollment, Pres Office, BOT, Legal, UMC
- **Area 4:** Athletics
- **Area 6:** Facilities, Real Estate & Planning; Hospitality & Auxiliary Services



We're Still Looking for Staff Advisory Council Representatives!

Help make a difference! The Staff Advisory Council (SAC) is still seeking representatives from the following areas. This is a great opportunity to share your perspective, connect with colleagues across campus, and help shape the staff experience at Wake Forest.

OPEN REPRESENTATIVE OPPORTUNITIES



AREA 1
Academics



AREA 3
Advancement, Enrollment,
Pres Office, BOT Office,
Legal, UMC



AREA 4
Athletics



AREA 6
Facilities, Hospitality,
and Aux Services



DIFFERENT ROLES. A STRONGER WFU.

INTERESTED?

REACH OUT TODAY!

Pro Humanitate



Chair: Tara Ebrahimi (Law School)

Members: Gillian Hagamen (Sabin Center), Stacey Lawson (Facilities, Real Estate & Planning), Javier Martin-Fernandez (Athletics), Luis Mendez (Transportation and Parking Services), Mark Seaver (Athletics), Shandi Starks (Campus Life), Amanda Tingle (Wake Downtown)

What We Do:

- Represent staff interests with respect to organizing philanthropic opportunities to facilitate promotion of *Pro Humanitate* at Wake Forest University
- Solicit staff input regarding service opportunities, organize events and activities, and coordinate volunteer efforts among staff to create a positive outcome for selected charitable causes
- Foster community engagement and connection

Coffee & Conversation



Next meeting: Thursday, Oct. 15 - 11 a.m. here in Broyhill Auditorium (or by Zoom)

Please join us for post-meeting coffee and conversation in the lobby

The SAC gratefully acknowledges the Finance and Administration Division and Jackie Travisano, Executive Vice President and Chief Financial Officer, who sponsored today's refreshments.

Share Your Voice



Campus Feedback

What are you hearing across campus? Share staff insights, concerns, and successes.



Meeting Topics

Do you have meeting topic suggestions? Help shape our future discussions and advocacy goals.

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