



**ECONOMIC
RESEARCH
INSTITUTE**

ERI UPDATE

ERI Subscribers' Research Symposium

Autumn Research Symposium

ERI's first Researchers and Analysts' Symposium is scheduled for December 4-8 at the Marriot Fashion Island in Newport Beach, California. We've planned five days of "techie talk" that only the compensation and benefit analyst would love (could tolerate). That is, the sessions are not designed for the "generalist" or "manager", but rather for the "mechanic" whose job description reads "analysis" or for the professional who consults in this area.

The Symposium will have a second "track", designed as an "initial course pretests" for professionals continuing CE, CPE, or MCLE credits (none will be available, as these presentations are intended to assist ERI in qualifying these courses for these credits).

Analysts' Education

Many universities and associations now offer courses in benefits and compensation designed to educate the generalist or prepare the manager. ERI courses have a totally different focus. Our goal will be to provide in-depth technical background related to the research associated with Assessor analyses (maximum reasonable compensation, lost wages, geographic differentials, pay practices in Spain, Daubert Challenges, etc.). We envision two methods of attaining this goal: 1) the before mentioned courses and 2) ERI providing a forum where individuals can present papers and/or problem statements and explore, in depth, with an audience of peers, experiences and related knowledge.

Call for Research Papers/Problems

Email or fax any presentation in which you might wish to participate or sponsor/give. Plan your presentation for 30 - 40 minutes with that same amount of time for audience feedback. We'll post your scheduled Symposium time, topic, and name at www.erieri.com/symposium and announce it in ERI's October 2000 Update newsletter.



The ERI Distance Learning Center

Because of the capabilities of the Internet, ERI is rewriting all Case Studies to create fully interactive Courses that may be used for continuing education credit and/or training of skilled and knowledgeable analysts and researchers. The related "MERIC" Masters designation for completions will represent a significant accomplishment (and far above average computational skills).

ERI's FIRST CALL FOR RESEARCH SYMPOSIUM TOPICS

Describe Your _____

Research Topic: _____

Your Name: _____ Title: _____

Organization: _____

Address: _____

Tel: _____ Fax: _____ E-Mail: _____

ERI DISTANCE LEARNING CENTER COURSES

All courses are designed to each average 110 minutes interactively for completion, using text, graphs, software programs, Internet references, footnotes, preliminary tests, and exercises. Certificate Applications are "in process", each for 1.0 hour of off-site interactive learning per course. ERI expects that most individuals taking these courses will be college graduates, although like the compensation & benefits discipline - common sense, a good memory, and moderate mathematic skills (algebraic) are the practical requirements. Courses are specifically designed for professionals' continuing education. ERI subscribers are welcome to participate, with ERI's most related research activities shown as a "Subscriber Focus" below.

	#	Certification Applications		#	Certification Applications
Foundation Courses (Skill areas required for MERIC)			Total Compensation Administration on the Internet		
Compensation & Benefit Terminology used by the Expert Witness	01	(CPE - MCLE - CE - MERIC) Intermediate	Answering Comp Administration's Newest Challenge: Salary Data from the WEB	71	(CPE - MCLE - CE - MERIC) Overview
Subscriber Focus: ERIPL, Assessor Series			Subscriber Focus: SaReview's surveys along with all the Competition		
Internet HRIS Systems, Online Administration, Available Information	02	(CPE - MCLE - CE - MERIC) Update	Assessing COL and Wage/Salary Differentials, Practices Among Locations**GA1	72	(CPE - MCLE - CE - MERIC) Intermediate
Subscriber Focus: BA Databases			Subscriber Focus: GA Two City Comparison		
Basic Quantitative Methods/Spreadsheets/Forms used in Comp & Benefits	09	(MERIC) Basic	Analyzing Compensation: Salary, Benefit, COL and Other Survey Sources	73	(CPE - MCLE - CE - MERIC) Basic
Subscriber Focus: ERIPL, Assessor Series			Subscriber Focus: GA Sources, CA Prevailing Wage Sources		
Litigation Support Related to Compensation & Benefits			Executive Compensation using the Internet		
Statistical Reliability: Daubert Challenges and Standard Error	11	(CPE - MCLE - CE - MERIC) Advanced	Designing an \$1 Million+ Executive Performance Based Compensation Plan	21	(CPE - MCLE - CE - MERIC) Advanced
Subscriber Focus: doltrends , CA/XA View SR			Subscriber Focus: CA/XA Individual Profile		
Determining Maximum Reasonable Compensation**XA2	12	(CPE - MCLE - CE - MERIC) Advanced	Black-Scholes and other Valuations of Equity Plans	22	(CPE - MCLE - CE - MERIC) Advanced
Subscriber Focus: CA/XA Proxy Analyses			Subscriber Focus: CA Black-Scholes Analyses		
Lost Wage Analyses (Wrongful Death, Disability, Termination, Pregnancy)	13	(CPE - MCLE - CE - MERIC) Advanced	Proxy Reporting Executive Pay - Methodology & Present Practices	23	(CPE - MCLE - CE - MERIC) Basic
Subscriber Focus: CA Lost Wage Analyses			Subscriber Focus: CA/XA Proxy Analyses		
Immigration Prevailing Wage Analyses (under GAL 2-98 and 1-00)	14	(CPE - MCLE - CE - MERIC) Advanced	Assessing Top Management's Pay among Comparable Companies**XA1	24	(CPE - MCLE - CE - MERIC) Intermediate
Subscriber Focus: CA Immigration Analyses			Subscriber Focus: CA/XA Proxy Analyses, CA Comparables		
Appraisals, Unique Legal and Tax Challenges in the Internet Age			Incentive Pay Design for the Internet		
Normalizing Executive Pay in a Valuation of a Privately-Held Company	41	(CPE - MCLE - CE - MERIC) Advanced	Creating a Non-Discriminatory Variable Pay Plan for all Employees**SA3	75	(CPE - MCLE - CE - MERIC) Intermediate
Subscriber Focus: CA/XA Benchmark List, CA Valuation Analyses			Subscriber Focus: SA Total Comp,Bonus, Base, BA and Gainsharing		
Appraisal Pitfalls: Accumulated Earnings (Bardahl Test), Research Credits	42	(CPE - MCLE - CE - MERIC) Advanced	Creating a Non-Discriminatory Sales Compensation Plan	76	(CPE - MCLE - CE - MERIC) Intermediate
Subscriber Focus: CA Valuation Analyses, CA Comparables			Subscriber Focus: SA Total Comp,Bonus, Base, BA Incentive Plans		
Selections of Comparables to be used in a Business Valuation	43	(CPE - MCLE - CE - MERIC) Intermediate	Pay for Performance and Gainsharing, their Affect on Base Salary Plans	77	(CPE - MCLE - CE - MERIC) Intermediate
Subscriber Focus: CA Comparables			Subscriber Focus: SA Total Comp, Incentive, Base		
Ethics, Pay Discrimination, and the Internet Communication Challenge			Internet Based Salary Administration		
Using Area Demographics in Developing an Affirmative Action Plan**PL1	31	(CPE - MCLE - CE - MERIC) Intermediate	Non-Discriminatory Individual Wage & Salary Determination**SA1	81	(CPE - MCLE - CE - MERIC) Intermediate
Subscriber Focus: ERIPL Demographic Data			Subscriber Focus: SA Individual Profile, SAReview College Offer Survey		
Glass Ceiling Analyses, Polynomial Regressions, Correlation, Reports	32	(CPE - MCLE - CE - MERIC) Advanced	Creating A Competitive Benchmark Structure, Matching HR Practices**SA2	82	(CPE - MCLE - CE - MERIC) Basic
Subscriber Focus: CA/XA Ind Profile ERIPL Demographic Data			Subscriber Focus: SA Assessor Benchmark Listing		
Job Evaluation, Equal Pay, the Systemic Pay Discrimination Challenge	33	(CPE - MCLE - CE - MERIC) Advanced	Setting Branch Office Salary Structures**GA3	83	(CPE - MCLE - CE - MERIC) Advanced
Subscriber Focus: GA Two City, SA Ind Profile, SaReview US, ERIPL			Subscriber Focus: GA Comparison Listings		
Quantitative Methods/Spreadsheets/Forms used in Discrimination Analyses	39	(MERIC) Advanced	Quantitative Methods/Spreadsheets/Forms used in Salary Administration	89	(MERIC) Intermediate
Subscriber Focus: ERIPL			Subscriber Focus: SA, GA		
Health and Welfare Internet Administration			International Remuneration, Internet Administered		
Advanced Characteristics of Benefits post HIPPA (States superseding ERISA)	51	(CPE - MCLE - CE - MERIC) Update	National and Third Party National Employees' Compensation & Benefits	91	(CPE - MCLE - CE - MERIC) Advanced
Subscriber Focus: BA Employee Communications,Reporting, FAQs			Subscriber Focus: SA View ,SaReview Int. Remuneration, IRef		
Benefit Plan Discrimination Testing: Sections 79, 105(h), 125, and 129	52	(CPE - MCLE - CE - MERIC) Advanced	Determining an Expatriate's Compensation, Elements, Practices**XA3	92	(CPE - MCLE - CE - MERIC) Intermediate
Subscriber Focus: BA Benefit Plan Discrimination Testing			Subscriber Focus: SA Geo List, SaReview Int COL and RA COL Table		
Costing Medical Benefit and Other Plans as National Carriers Disappear	53	(CPE - MCLE - CE - MERIC) Intermediate	Relocation of an Employee (Attorney) to a Foreign Assignment	93	(CPE - MCLE - CE - MERIC) Advanced
Subscriber Focus: BA OnLine Review & Changes, SA Review Benefits			Subscriber Focus: RA Two City Com, Est Per Diems, SaReview Int COL		
Electronic US DOL SPD and 5500 Reporting	54	(CPE - MCLE - CE - MERIC) Basic	Relocation of a Facility (Domestic and/or International)	94	(CPE - MCLE - CE - MERIC) Advanced
Subscriber Focus: BA Employee Benefit 5500 Reporting			Subscriber Focus: BA Relocation Labor Costs, RA, SaReview Int Rem		
Internet Based Benefit Administration			Quantitative Methods/Spreadsheets/Forms used in International Compensation		
The State of Online Internet Administrative and Regulatory Programs	55	(CPE - MCLE - CE - MERIC) Overview	Quantitative Methods/Spreadsheets/Forms used in International Compensation	99	(MERIC) Intermediate
Subscriber Focus: BA On-Line , HR Tax Codes, SAReview Benefits			Subscriber Focus: RA		
Internet Applications for Retirement Plans and Retirement Plan Designs	56	(CPE - MCLE - CE - MERIC) Intermediate			
Subscriber Focus: BA On-Line, HR Tax Codes, SA Review Benefits					
Relocating An Employee within the U.S. - Compensation Considerations**RA1	57	(CPE - M CLE - CE - MERIC) Basic			
Subscriber Focus: RA Two City Comparison, SaReview COL					
Quantitative Methods/Spreadsheets/Forms used in Benefit Administration	59	(MERIC) Intermediate			
Subscriber Focus: BA					

Courses under development are designed to provide 1.0 hour of continuing education credit. Credits are available on a state/province basis and hence, may not be available in your location. The ERI Distance Learning Account system will compare your State log-in location (and continuing education choice) to ERI's accreditation list. A message will flag if credit is not available.

ORDER SHEET

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(800) 627-3697

RESEARCH SYMPOSIUM

- ERI Present Subscribers:** \$689 \$ _____
Tuition will be refunded in full if dissatisfied with these initial offerings
- Non Assessor Series Subscribers:** \$1,189 \$ _____
Tuition refundable in full if dissatisfied with ERI's First Researchers' Symposium

ASSESSOR SERIES® (annual software subscriptions, updated quarterly)

- Salary Assessor® ERISA** Annual subscription \$689. \$ _____
- Relocation Assessor® ERIRA** Annual subscription \$689. \$ _____
- Geographic Assessor® ERIGA** Annual subscription \$689. \$ _____
- Consultant's Assessor® ERICA** Annual subscription \$2,189. \$ _____
Contains the **Executive Compensation Assessor, Comparables**

REFERENCE SERIES (single, annual hard copy editions)

- Geographic Reference Report** \$389. (Scheduled Release 10/2000) \$ _____
- International Reference Report** \$1,189. (Scheduled Release 08/2000) \$ _____

SUBSCRIBER SUPPORT

- ERI's Platform Library ERIPL** \$689. No charge to subscribers \$ _____

LAN/WAN SUBSCRIPTIONS

- Single LAN/WAN Subscription with # of users = _____ \$ _____
Additional 50% for a LAN license. Additional 25% for each additional LAN user above 2.

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(Standard Shipping & Handling includes quarterly updates throughout subscription year)

Additional charges for **Overnight Shipping** to my UPS or FedEx acct. # _____ \$ _____
or for **ERI's Standard Overnight Shipping** additional \$64.00
(Overnight Shipping pays additional charges for initial shipment)

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TOTAL \$ _____

Non Subscribers

- Credit Card
- Payment Enclosed

All those new to the Assessor Series will receive a complimentary subscription for the remainder of the Year 2000 should a personal laptop be available for installation

Your Name: _____ Title: _____

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Research Symposium Schedule

Track I - Research Papers

*Delivery of a Paper and/or Problem for Discussion
Requires Presubmission before 9/20*

Monday December 4, 2000

08:00 Welcome to ERI's 1st Researchers & Analysts' Symposium
Dr. Susan Sassalos, Dr. Thomas Atchison, Dr. David Thomsen

Papers/Problem Presentations - Monday December 4, 2000

08:30 Analysis of Executive Compensation, What SEC Proxies Miss
Marvin Dertien, ERI

09:45 Open

11:00 Open

01:15 Open

02:30 Open

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All Submissions are Welcomed!
Accepted Presentations will be Posted Daily

www.eri.com

*For past **Reference** or **Assessor** subscribers, a Year 2001 renewal offer accompanies this **ERI Update**. To conserve postage and packaging, ERI sends out the following year's subscription renewal offer with the last two quarterly releases of each year's subscription. All Year 2000 and 2001 **Assessor Series** and **References** subscribers receive an **H.R. Intranet Administrative Site** that supports research communications, complimentary retrievals from **SalariesReview.com**, and access to ERI's immigration data and proxy/10-K/appraisal norm libraries.*

Track II - Interactive Courses

*Participation requires one to bring their own laptop PC
with a CD-ROM reader for provided training materials*

Monday December 4, 2000

08:00 Welcome to ERI's 1st Researchers & Analysts' Symposium
Dr. Susan Sassalos, Dr. Thomas Atchison, Dr. David Thomsen

Foundation Courses/Litigation Support - Monday 12/4/2000

08:30 Compensation & Benefits Terminology for the Expert Witness

09:45 Statistical Reliability: Daubert Challenges and Standard Error

11:00 Determining Maximum Reasonable Compensation

01:15 Lost Wage Analyses

02:30 Immigration Prevailing Wage Analyses

Internet/Legal-Tax Challenges/Appraisals/Pay - Tuesday 12/5/2000

08:30 Normalizing Executive Pay in a Valuation of a Privately-Held Corp.

09:45 Selections of Comparables to be used in a Business Valuation

11:00 Answering Salary Data Challenges Derived from the WEB

01:15 Analyzing Salary, Benefit, COL Survey Sources

02:30 Regulatory Environment - Differences Among States/Provinces

Health & Welfare/Internet Benefit Admn - Wednesday 12/6/2000

08:30 Advanced H&W Challenges post HIPPA (state differences)

09:45 Benefit Plan Discrimination Testing

11:00 Electronic US DOL SPD and 5500 Reporting

01:15 Online Internet Administrative Programs

02:30 Relocating an Employee with the U.S. - Comp & Benefit Issues

Salary Administration and Variable Pay - Thursday 12/7/2000

08:30 Non-Discriminatory Individual Salary Determinations

09:45 Creating a Competitive Benchmark Structure

11:00 Setting Branch Office Salary Structures

01:15 Pay for Performance and Gainsharing, Affect on Salary Plans

02:30 Relocation of an Employee to a Foreign Assignment

Total Comp/Exec/International - Friday 12/8/2000

08:30 Black-Scholes and other Valuations of Equity Plans

09:45 Proxy Reporting Executive Pay - Methodology and Data

11:00 Assessing Top Management's Pay among Comparables

01:15 Cost Modeling of Labor Costs in a Facility's Relocation
(Remember: Attendees must bring laptop PCs)

The above are "pretests" as ERI is seeking approval for CPE credit from NASBA, CE and MCLE from the State of California. State boards of accountancy, law, and insurance have final authority on the acceptance of the individual courses for continuing educational credit. Complaints regarding CPE sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN, 37219-2417. Telephone: 615-880-4200.