University of Washington
Faculty Council on Benefits and Retirement
October 28, 2019
2:30 p.m. – 4:00 p.m.
Gerberding 36

Meeting Synopsis:

1. Call to order
2. Review of the minutes from May 20, 2019
3. Updates on FCBR agenda items from 2018-19
   a. Supplemental retirement income – data and computations
   b. Retirement transition recommendations to the Provost
   c. UWRP opt-out option for employees over 50 – implementation
   d. Faculty family leave & WA state law
4. Proposed FCBR activities for FY 2019-20
5. Good of the order
6. Adjourn

1. Call to order

The meeting was called to order at 2:30 p.m.

2. Review of the minutes from May 20, 2019

The minutes from May 20, 2019 were approved as written.

3. Updates on FCBR agenda items from 2018-19

Shankar, the chair, updated the council on agenda items that the council covered last year (detailed below).

   a. Supplemental retirement income – data and computations

The chair noted that implementation is still in progress. Rachel Gatlin, Executive Director of Total Benefits, commented that faculty and staff members can receive their contribution information by sending requests to her team via email. The chair noted that he and Stephan Siegel, former FCBR chair, developed a calculation which individuals can use to provide an estimate of their supplement. Mindy Kornberg, Vice President of Human Resources, noted that everyone who retires, and is eligible, is notified what their calculation/benefit is. The tool that FCBR created is intended to provide additional education for retirement planning purposes. The chair will work with UW Benefits on finding an online location for the tool and information to live.

   b. Retirement transition recommendations to the Provost

The council received a response from the Provost regarding their request to improve retirement transitions for faculty (Exhibit 1). UW Benefits and Academic Personnel are working together to revise
their websites in order to provide clear information and strategies for employees who are in different stages of their career. The UW Retirement Association (UWRA) would prefer to see additional, in-person workshops that provide assistance to employees, as well as, individualized appointments that address issues unique to faculty members. Furthermore, UWRA, would like to work in collaboration with UW Benefits and Academic Personnel to address faculty retirement concerns.

c. UWRP opt-out option for employees over 50 – implementation

The chair shared that the Board of Regents approved the language to make the opt-out change; however, the implementation is delayed due to significant program changes (e.g. Workday integration issues). Gatlin noted that it is queued. The council will be notified when the work begins.

d. Faculty family leave & WA state law

Marisa Graudins, Director of HR Policy and Legislation, provided an update on Paid Family & Medical Leave (Exhibit 2). This is a separate program that is available to Washington state employees. The state is still making rules until December 2019. Currently, UW faculty and staff can utilize the University and state benefits; University employees do not have to choose.

4. Proposed FCBR activities for FY 2019-20

The chair shared the FCBR charge letter from the Faculty Senate Chair, Joe Janes (Exhibit 3).

A member requested that the council consider advocating for dependent professional travel care. Some peer institutions provide this benefit. Kornberg noted that the University does have some coverage for dependent professional care, but it does not cover travel. Gatlin will share the current policy with the council.

Another member asked the council would support a fully subsidized UPASS for faculty and staff. The council members agreed to pursue the topic and possibly write a Class C resolution.

A member asked if the council was interested in long term healthcare benefits from the state. Kornberg and Gatlin commented that the state does not currently offer long term healthcare benefits, but there is a ballot initiative.

5. Good of the order

Nothing was stated.

6. Adjourn

The meeting was adjourned at 4:00 p.m.

Minutes by Lauren Hatchett, lehatch@uw.edu, council analyst

Present: Faculty Code Section 21-61 A: Ellen Covey, Gowri Shankar (chair), Nicole Hoover, Pete Johnson, Monika Sobolewska, William Yuh
Faculty Code Section 21-61 B: Charles Hirschman, Laura Lillard
President’s designee: Mindy Kornberg
Guests: Rachel Gatlin, Cathy Randolph

Absent: Faculty Code Section 21-61 A: Jason Wright, Mary O’Neil
Facility Code Section 21-61 B: Andrew Flannery, Laura Lillard

Exhibits
Exhibit 1 – Provost response to FCBR letter.pdf
Exhibit 2 – Paid Family Medical Leave update.pdf
From: Stephan Siegel <ss1110@uw.edu>  
Sent: Sunday, September 15, 2019 11:52 PM  
To: Gowri Shankar; Pat Dougherty; Miceal F. Vaughan; Charles Hirschman  
Cc: Lauren Hatchett  
Subject: FW: UW Retiree Relations: In response to your March 2019 letter

Dear all –

I hope you had an enjoyable and productive summer.

I wanted to share with you the below response that I received last month in response to FCBR’s earlier requests that i) the Provost clarifies the role of the UW Retiree Relations office as well as ii) the Provost considers sending out an annual letter about retirement to all UW faculty.

I will leave it to the incoming FCBR chair, Gowri Shankar, to consider if and how FCBR might want to respond.

Best,

stephan

From: Office of the Provost <provost@uw.edu>  
Sent: Friday, August 9, 2019 16:24  
To: Stephan Siegel <ss1110@uw.edu>  
Cc: Paul Rucker <prucker@uw.edu>; George A. Sandison <sandison@uw.edu>; Joseph Janes <jwj@uw.edu>; Cheryl A. Cameron <ccameron@uw.edu>; Mindy Kornberg <mindyk@uw.edu>  
Subject: UW Retiree Relations: In response to your March 2019 letter

Dear Professor Siegel,

Thank you for your leadership of the Faculty Council on Benefits and Retirement (FCBR). I understand that the FCBR in 2017-18 and 2018-19 dedicated some of its efforts to issues of retirement.

A recurring message that has been conveyed is the need for enhanced availability of retirement related information. Based on your feedback, Human Resources and Academic Personnel are working together to develop an enhanced web-based experience related to retirement planning for our employees. As you know, this year, Human Resources expanded the availability of its highly acclaimed retirement workshops. In the next year, we plan to be able to share additional resources with FCBR.

You also communicated the FCBR’s support for the University Advancement retiree relations program. The retiree relations program serves as a valuable resource for our retirees and facilitates their continued connection to the University in their post-retirement years. It is my understanding that University Advancement, through Paul Rucker, continues to support this program. At this time, an expansion of the role of the retiree relations program in not envisioned. But we do hope that the coordinated work of Human Resources and Academic Personnel will enhance access to retirement planning and transition support for our employees.

Sincerely,
Mark A. Richards
Provost and Executive Vice President for Academic Affairs
Professor, Earth and Space Sciences
Paid Family & Medical Leave | Status Update, 10/28/19

Premium Assessment
- Premiums are being assessed at a 63/37 split on all employees whose work location is Washington State.

Employment Security Rule-Making
- **Phase 6** - Rulemaking for appeals, any necessary changes related to 2019 legislative session take effect **December 20, 2019**
- **Other** - Off-cycle rule-making appears to also be occurring, related to employer-provided benefits

Policies – Open Issues/Questions
UW continues to work with ESD to determine how ESD’s PFML program intersects with UW’s existing paid time off and leave of absence policies. Outstanding issues:

- Whether paid time off will be considered a supplemental benefit for the purpose of ESD’s calculation of the paid benefit.
- Impact to disability and parental leave of absence policies for faculty and staff, including associated collective bargaining
- What guidance and/or rule changes the Office of Financial Management (OFM) State Human Resources will be providing for classified staff regarding:
  - Supplemental benefits
  - Whether the UW and other state agencies are considered a single employer for the purpose of determining both job protection hours worked (1,250 hours).
- What changes will be needed in Workday to request and track the leave of absence, or designate time offs as PFML covered.

Recent Discoveries
- The 1250 hours worked are truly hours worked (unlike the hours worked for eligibility which are NOT hours worked) and aligns with the FMLA in terms of how it’s counted. This count is determined by the Employer.
- Under the draft WAC 192-700-020, employer-paid benefits must be provided when an employee is on PFML if they meet eligibility requirements under FMLA. This is in rule because the statute contemplates only concurrent leaves (FMLA/PFML) and is more or less a mistake that ultimately may be fixed in the law.
- ESD will likely only go live with online claim filing, not weekly benefit requests; those will be handled by phone with their customer care team.
- Regarding WAC 192-610-075, we are within our rights to enforce our policies regarding use of accrued paid time off before, in place of, or during a PFML as long as we didn’t know a PFML leave was going to happen. But during a PFML leave, it is up to the employee whether to use accrued paid time off.
SUPPLEMENTAL BENEFITS CHART

During the 2019 legislative session, SHB 1399 was passed to incorporate not only technical corrections, but also the ability for employers to provide "supplemental benefits," such as employer-provided paid vacation, sick, or other paid time off at the same time the employee is receiving PFML benefits. "Supplemental benefits" are helpful to employees because PFML benefits are capped at $1,000 per week.

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| UW does not designate supplemental benefits | When employees use accrued paid time off during a medical/family leave, ESD reduces the amount of their PFML claim by the amount of time off used. The paid time off is considered the same as hours worked by ESD.  

**Example:** Employee takes a full week of sick time off (40 hours). Employee does not receive any paid benefit from ESD.  

**Example:** Employee takes 4 days of leave without pay (32 hours unpaid). Employee receives 80% of paid benefit from ESD. |

| UW designates supplemental benefits up to 100% cap | When employees use accrued paid time off during a medical/family leave, they do not report the accrued paid time off to ESD.  

**Example:** Employee takes a full week of sick time off (40 hours). Employee receives full paid benefit from ESD. UW must perform calculations and adjust leave records to ensure UW paid time off + PFML = no more than 100% of wages. |

| UW designates supplemental benefits with no cap | When employees use accrued paid time off during a medical/family leave, they do not report the accrued time off to ESD.  

**Example:** Employee takes a full week of sick time off (40 hours). Employee receives full paid benefit from ESD and full pay from UW. |
When life happens, you can be there for care.

At some point, everyone needs to take time off from work to recover from a serious illness or injury, take care of a family member with a major medical condition, or bond with a new child. Starting in January 2020, most people who work in the state of Washington will be able to use Paid Family and Medical Leave to help replace their paycheck during these important times.

**What is Paid Family and Medical Leave?**

Paid Family and Medical Leave is a new state program that allows you to take paid time off to care for yourself or a family member when life’s big events happen, such as:

- Bonding with a newborn, adopted, or foster child
- Recovering from surgery, a serious illness or injury
- Supporting a family member with a serious medical condition
- Certain events connected to a family member’s active duty military service

While you’re out, you will receive payments from the state based on a percentage of your typical weekly earnings. Paid Family and Medical Leave is funded through small contributions that come from both workers and many employers.

For more information, visit www.paidleave.wa.gov
How do you qualify?
Nearly everyone who works in Washington will be part of the program. You are eligible when you work at least 820 hours (about 16 hours a week) during the qualifying period, which is about year, and you experience a qualifying event. Part-time, seasonal and temporary workers qualify. You are also eligible if you work for multiple employers.

When does the program start?

How much time can you take?
12 weeks
Eligible employees can take up to 12 weeks of paid leave a year.

16 weeks
You may be eligible for up to 16 weeks if you have a personal medical event and family caregiving event happen in the same year—like giving birth to a baby or caring for an ill or injured family member.

18 weeks
In cases related to complications in pregnancy, you may be able to take up to 18 weeks.

How much does the coverage cost employees?
Employees and employers are already contributing to the program. The amount you pay varies by how much you earn. For example, an employee who makes $50,000 a year pays about $2.44 each week through payroll deductions. Businesses with fewer than 50 employees are not required to contribute to the program but workers at small businesses are still covered.

How do you apply?
If you or a member of your family experiences a serious medical condition or you welcome a new child into your family, you can apply for benefits through Washington’s Employment Security Department starting January 2020.

You’ll need to get certified—usually from a medical provider. If you have a planned qualifying event, such as the birth of a child or scheduled surgery, you’ll need to give your employer 30 days’ advanced notice.

For more information, visit www.paidleave.wa.gov
September 16, 2019

Gowri Shankar  
Chair, Faculty Council on Benefits and Retirement

Dear Professor Shankar:

The Faculty Council on Benefits and Retirement is charged with responsibility “for all matters of policy relating to faculty retirement, insurance and benefits” (Faculty Code, Sec 42-44). Activities historically performed include developing and addressing a prioritized list of benefits, retirement, and insurance-related issues, inquiries, and interests on behalf of UW faculty, especially by way of inviting key administrators and stakeholders to meetings to provide supplementary information as well as to receive council feedback on the topics at-hand.

Our recommendation is that the council identify specific goals that can be accomplished by the end of the 2019-20 academic year.

The Senate office did a background review to help identify goals for your council. This included review of minutes from last year’s meetings, review of discussions at Faculty Senate meetings, and selected outreach for topics. Recommended goals and / or topics for discussion include:

* Continue to work with UW Benefits and explore the feasibility of a tool that would allow UW employees to estimate income from the UW Supplemental Retirement Plan (UWSRP).
* Continue to work with UW Benefits, UW Retirement Relations and UW Retirement Association on coordinated pre-retirement planning communications and events.
* Request information from UW Benefits and Academic HR regarding the state paid family and medical leave and the implementation plan.

After your first council meeting we will be available to discuss the goals your council identified. Thereafter, we will post your council’s goals on the Faculty Senate website to communicate the important work you are doing.

Many thanks to you and the members of your council, on behalf of Senate Leadership and the faculty of the University, for all your time and work this coming year. I wish you all the best and look forward to working with you.

Sincerely,

Joseph Janes  
Faculty Senate Chair