

University of Washington
Faculty Council on Benefits and Retirement
May 22nd, 2017
2:30 pm – 4:00 pm
Gerberding B36

Meeting Synopsis:

1. Call to order
 2. Review of minutes from April 24, 2017 (see attachment)
 3. Benefits Comparison: Remaining topics and final report
 4. Opt-in/out choices for UWRP Contributions for those of age 50+
 5. Parental leave policy for faculty (see attachment)
 6. Increased limit for long-term disability benefit
 7. Proposed ad hoc sub-committee on faculty pre-retirement planning (see attachment)
 8. New topics for 2017/18
 - a. Survey and interviews of faculty, faculty councils, chairs, and deans.
 - b. The housing market and UW housing support
 9. Good of the order
 10. Adjourn
-

1) Call to order

Chair Siegel called the meeting to order at 2:33 p.m.

2) Review of minutes from April 24, 2017

The minutes from April 24, 2017 were approved as amended.

3) Benefits Comparison: Remaining topics and final report

Chair Siegel introduced the final report for the council's benefits comparison (Exhibit 1). He highlighted the comparison between UW and peer schools on parental leave. He also spoke about increasing the contribution level for those below the age of 35 from 5% to 7.5%. FCBR agreed to look into this further next fall.

FCBR will share the report with the Senate Executive Committee. It will also be made available on the FCBR website.

4) Opt-in/out choices for UWRP Contributions for those of age 50+

Katy Dwyer, Executive Director of Benefits, introduced the topic. The new Workday system (effective July 10) allows the University to change the choice of increased UWRP contributions for those of age 50

or older from an opt-in to an opt-out policy. Under an opt-out policy, a faculty member would be given the option to opt-out of increased contributions, when the faculty member turns 50. If the faculty member decides to opt-out initially, he/she would be able to opt-in at any time in the future.

This function will not be available in the system right away, so the council will come back in the fall and submit a formal request to Workday to stress the importance of the change.

5) Parental leave policy for faculty

Wright spoke about the policy and the work that the subcommittee has completed. They have shared the legislative proposal with a number of units and faculty members around campus and have received positive feedback.

There were minor amendments made to the legislation.

A motion to approve the draft Class B legislation and forward the proposal to the first Senate Executive Committee meeting in the fall passed unanimously (Exhibit 2).

6) Increased limit for long-term disability benefit

Chair Siegel discussed long term care options and the council decided to express support for increasing the limit for long-term disability benefits to the Public Employees' Benefit Board (PEBB).

7) Proposed ad hoc sub-committee on faculty pre-retirement planning

Miceal Vaughan, an emeritus UW Faculty member, presented his proposal to the council. Vaughan attended a conference last year and became interested in making pre-retirement planning information more readily available to faculty. It was noted there is not a lot of information available at the UW relating to retirement planning; however, peer institutions have a plethora of information on their websites and that they send to faculty each year.

Vaughan explained he would like to create an ad-hoc committee to the council, to focus on pre-retirement planning. The council endorsed the plan and Vaughan was identified to take the lead on getting the subcommittee off the ground.

8) New topics for 2017/18

- a. Paul Hopkins, chair of the Senate Committee on Planning, encouraged the council to informally speak to department chairs to find out if there are any benefits issues that have come up. Chair Siegel asked each council member to speak to their chair or dean about this issue. Siegel will send an email to FCBR with suggested questions.

b. The housing market and UW housing support

A real estate economist at the Business School is interested in speaking with the council about the market as an economist.

The Office of Regional Relations at UW has also been looking into the topic. They may be able to come in and present what they have found.

10) Good of the order

There was no good of the order.

11) Adjourn

Siegel adjourned the meeting at 4:05 p.m.

Minutes by Jordan Smith, jjsmith4@uw.edu, assistant to the secretary of the faculty

Present: **Faculty:** Stephan Siegel, Russell Fernandes, Gowri Shankar, Mary O’Neil, Jason Nixon Wright
Ex-officio reps: Iva Loukanova, Charles Chamberlin
President’s designee: Mindy Kornberg
Guests: Katy Dwyer, Miceal Vaughan

Absent: **Faculty:** John Mittler, Iulia Metzner
Ex-officio reps: Laura Lillard, Erick Winger
Guests: Patricia Dougherty

Exhibits

Exhibit 1 – FCBR Benefits comparison Final Report 20170522.pdf

Exhibit 2 – final_proposedparentalleaveforfaculty_legformat_fcbr_spring2017.doc

University of Washington -- Faculty Council on Benefits and Retirement (FCBR)

Benefits Comparison: UW vs. other public U.S. research institutions

May 2017

Summary

Over the academic year 2016/17, the Faculty Council on Benefits and Retirement (FCBR) has performed a comprehensive review of benefits available to full-time faculty at the University of Washington (UW) in comparison to faculty benefits at other public research institutions in the U.S. Overall, faculty benefits at UW are similar to benefits offered by other public research institutions. However, FCBR has identified a few areas in which UW benefits are less generous and less competitive than those of other public institutions and has proposed several specific steps to further examine, monitor, or improve UW benefits in those areas. Finally, FCBR has also reviewed the livability and the cost of living of the Seattle area. While UW compares favorably to its peers in terms of livability, the cost of living, in particular housing, is higher than at peer institutions.

Overview

Responding to an inquiry by the Senate Executive Committee (SEC) of the University of Washington, FCBR compared faculty benefits available at UW to those available at other U.S. public research institutions. During several FCBR meetings in 2016/17, FCBR reviewed benefits related to:

- Health care
- Retirement
- Tuition
- Other benefits:
 - Life, disability, and other insurance
 - Child care
 - Paid time off

For comparison with other institutions, FCBR obtained data from the 2016 “Benefits in Higher Education Survey” which was carried out by [CUPA-HR](#), an association for HR professionals in higher education that UW is a member of, and which reports benefits at a large number of U.S. colleges and universities as of January 1, 2016.

Since only five of the top 25 U.S. public research universities that UW uses for peer comparison were included in the survey data,¹ FCBR decided to use all up to 31 public U.S. research institutions included in the survey data as the main benchmark for comparison. However, FCBR also considered the benefits reported for the five top 25 institutions included in the survey as well as for a group of eight private research institutions that were included in the survey data as well. Appendix B lists all institutions

¹ The top 25 U.S. public research institutions were identified by the [UW Office of Planning and Budgeting](#) based on the U.S. News ranking for 2015. They are listed in Appendix A.

included in the three groups, which FCBR considered, with “Public Research Institutions” serving as the main benchmark.

FCBR also reviewed the overall livability and cost of living data for the Seattle (MSA) area as well as for the areas of the top 25 U.S. public research institutions, listed in Appendix A. Livability scores were obtained from [AARP](#), while cost of living measures, which include “required income for a family of four,” house prices, as well as sales and income taxes, were collected from [MIT’s Living Wage Calculator](#), [Zillow](#), as well as the [Tax Foundation](#) and [TaxRate.com](#).

Findings

Using data from the 2016 “Benefits in Higher Education Survey,” FCBR compared UW benefits to those offered by other Public Research Institutions that participated in the survey. The comparison was performed at a detailed level that included many aspects of each benefit category. Appendix C provides a complete list of all aspects considered. UW benefits and survey responses typically refer to January 1, 2016. However, in a few cases, such as UW life insurance benefits that changed at the beginning of 2017, UW benefits have been updated to reflect such changes. Finally, not all institutions responded to all survey questions. Appendix C therefore reports the number of institution (*N*) as well as the average response across those that responded. Based on these detailed benefits data, FCBR arrived at the following conclusions for each benefit category.

Health care

- The health care plans offered by UW compare favorably with plans offered by other public research institutions.

Retirement

- The average annual retirement contribution by UW for each covered employee is USD 5,287, below the average of USD 7,300 for other Public Research Institutions. However, the comparison of monetary amounts across institutions is difficult given different age and compensation profiles across universities.
- Based on contribution rates for 403b plans, UW’s contribution rates (5% for those under age 35, 7.5% for those under age 50, and 10% for those 50 or older) are below those of other Public Research Institutions (on average at 9% for all ages), except for participants at or over age 50. The gap is particularly pronounced for young participants under age 35 (5% vs. 9%).

Tuition

- As many other Public Research Institutions, UW offers tuition benefits for faculty members. However, differently from about 75% of other Public Research Institutions, UW does not offer tuition benefits for spouses or children of faculty members.
- UW does offer in-state tuition for UW faculty members and their children and spouses who are not Washington state residents.

Other benefits: Life, disability, and other insurance

- Using UW life insurance benefits in place since the beginning of 2017, life insurance benefits are in line with those of other public research institutions.

- UW does not offer a short-term disability insurance, as short-term disability is covered by [UW's paid sick leave policy](#).
- Relative to other public research institutions, the maximum monthly USD amount available under UW's long term disability insurance is relatively low (USD 6,000 compared to an average of USD 9,883). Such a low upper limit is problematic, given increasing costs of living, in particular housing costs in the Seattle area.
- While not part of the comparison table, FCBR also noted that UW currently does not offer a long term care insurance.

Other benefits: Child Care

- UW child care benefits are comparable to benefits offered by other Public Research Institutions.

Other benefits: Paid time off

- UW currently offers paid leave of up to 90 days for new birth parents only through UW's sick leave policy. UW does not offer paid leave for new parents beyond sick leave. While only 29% of Public Research Institutions offer additional paid leave (on average 8 weeks) for new parents, a separate comparison performed by FCBR's subcommittee on parental leave found that 69% of [UW's Global Challenge State Peer Institutions \(GCS\)](#) offer paid parental leave (through sick leave or separate parental leave) to all new parents, including non-birth parents.

FCBR also compared the livability and cost of living between the Seattle (MSA) area and the cities of the top 25 public research universities listed in Appendix A. FCBR found that in terms of overall livability Seattle ranks in the top 90th percentile relative to its peer institutions. Appendix D reports the details of the livability comparison. However, comparing the cost of living between Seattle and the cities of the top 25 public research institutions, FCBR also found that the required pre-tax income for a family of four is about 8% higher in Seattle relative to the median value of the peer group. In particular, the price per square foot (sf) of a single family house is about 50% higher in Seattle relative to the median value for the peer group.

Proposed actions

FCBR decided to take or propose the following actions. Only benefit categories with action items are listed.

Retirement

- FCBR decided to ask the administration to reconsider an earlier' request by FCBR and the SEC to change from an opt-in to an opt-out policy for the increased (from 7.5 to 10%) contribution level for those age 50 or older.
- FCBR also proposes to investigate increasing the contribution level for those below age 35 from 5% to 7.5%.

Tuition

- FCBR will continue to monitor the faculty's interest in tuition waivers for faculty's spouses and children.

Other benefits: Life, disability, and other insurance

- Since UW's long term disability insurance is under control of the Health Care Authority (HCA) of Washington State, FCBR will inquire with HCA if relevant changes to the long term disability insurance are planned and to express its support for a higher upper benefits amount.
- Similarly, FCBR will contact HCA (??) to express its support for a group-policy for long term care insurance.

Other benefits: Paid time off

- FCBR has formed an ad-hoc subcommittee to propose changes to the Faculty Code that would provide paid leave for all new parents.

Livability and Cost of Living

- FCBR will look at the local housing market and explore possible housing benefits for UW faculty.

Conclusion

FCBR reviewed benefits available to UW faculty and compared them to benefits available at other public research institutions as of January 1, 2016. The comparison revealed that benefits at UW are overall similar to those offered by others institutions. However, FCBR identified a few areas in which UW benefits could be improved.

FCBR will continue to monitor UW benefits as well as U's faculty's priorities with respect to benefits. Where applicable and feasible, FCBR will take steps towards improving UW benefits by working with the Faculty Senate and the administration.

FCBR will share this report with the SEC, the Faculty Senate, as well as the UW faculty at large. FCBR welcomes benefits related questions and suggestions from all interested parties.

Appendix A

Top 25 U.S. Public Research Universities (2015)

U California-Berkeley
U California-Los Angeles
U Virginia
U Michigan-Ann Arbor
U North Carolina-Chapel Hill
Georgia Inst Tech
U California-Santa Barbara
U California-Irvine
U California-San Diego
U Wisconsin-Madison
U Illinois-Urbana-Champaign
U California-Davis
U Florida
Penn St U-Main
U Texas-Austin
Ohio St U-Main
U Maryland-College Park
U Connecticut
Purdue U-Main
Clemson U
U Georgia
U Pittsburgh-Pittsburgh
U Minnesota-Twin Cities
Texas A&M U
Virginia Tech

Appendix B

Comparison Groups with (Some) Non-missing Survey Data

Peers - Group of 25

Clemson University
 Penn State University System Summary
 Pennsylvania State University
 University Pennsylvania State University
 University of Maryland College Park
 University of Pittsburgh System Summary
 University of Pittsburgh

Public Research Institutions

California State University System Summary
 Clemson University
 Florida State University
 George Mason University
 Indiana University System Summary
 Indiana University at Bloomington
 Kansas State University
 Michigan State University
 Michigan Technological University
 New Mexico State University System Summary
 New Mexico State University Main Campus
 Oklahoma State University System Summary
 Oklahoma State University
 Penn State University System Summary
 Pennsylvania State University
 The University of Arizona
 University of Alabama at Birmingham
 University of Alaska Statewide System Summary
 University of Alaska Fairbanks
 University of Central Florida
 University of Cincinnati System Summary
 University of Cincinnati Main Campus
 University of Florida
 University of Hawaii System Summary
 University of Hawaii at Manoa
 University of Idaho
 University of Louisiana at Lafayette
 University of Maryland College Park
 University of Missouri System Summary
 University of Nevada-Las Vegas
 University of New Mexico Main Campus
 University of Pittsburgh System Summary
 University of Pittsburgh
 University of South Alabama
 University of South Carolina - Columbia
 University of Toledo
 University of Utah
 University of Vermont
 University of West Florida

Private Institutions

Carnegie Mellon University
 DePaul University
 New York University
 Northwestern University
 Rice University
 The George Washington University
 University of Rochester
 Vanderbilt University

Note that in cases in which data is not available for a specific campus data for the entire system is used instead.



Appendix C

Benefits Comparison: Detail

	Year	UW	Peers (Group of 25)		Public Research Institutions		Private Institutions	
	2015/16		N	Average	N	Average	N	Average
Health Care								
Plans offered:								
PPO		Yes	5	100%	27	94%	6	86%
HMO		Yes	3	60%	14	48%	3	43%
POS		No	0	0%	1	6%	2	29%
HDHC		Yes	4	80%	20	74%	6	86%
% Employees per plan								
PPO		73%	5	57%	27	56%	6	68%
HMO		17%	3	59%	14	55%	3	21%
POS		0%	0	0%	1	100%	2	64%
HDHC		10%	4	9%	20	21%	6	17%
Dental plan								
Dental plan offered		Yes	4	100%	19	84%	7	100%
% Employees in dental plan		100%	4	88%	19	84%	7	77%
Employee only: Employee pays (monthly premium) (USD)		0	4	17	19	19	7	23
Employee only: Institution pays (monthly premium) (USD)		81	3	16	18	23	5	25
Employee only: Total Premium (USD)		81	5	23	25	31	7	41
Family: Employee pays (monthly premium) (USD)		0	5	48	21	57	7	73
Family: Institution pays (monthly premium) (USD)		81	3	38	18	69	5	68
Family: Total Premium (USD)		81	5	71	25	97	7	121
Plan has annual deductible: individual		50	5	25	24	112	7	46
Plan has annual deductible: family		150	5	63	24	120	7	129
Is there an annual max benefit for nonorthodontia?		1,750	5	1,250	25	1,467	7	1,714
Health benefits for retired faculty								
- FACULTY retirees under the age of 65		Yes	4	100%	30	87%	7	86%
- If Yes, does institution pay part of the premium?		No	4	50%	25	44%	6	50%
- FACULTY retirees aged 65 and older (Medicare eligible)		Yes	4	100%	30	87%	7	86%
- If Yes, does institution pay part of the premium?		Yes	4	50%	25	44%	6	67%
Other								
- Use a salary-based system to determine health care premiums?		No	4	25%	30	20%	7	71%
- Offer a Health Care Flexible Spending Account		Yes	4	100%	30	100%	7	100%
- Offer a Dependent Care Flexible Spending Account		Yes	4	100%	30	100%	7	100%

Appendix C

Benefits Comparison: Detail

	Year	UW	Peers (Group of 25)		Public Research Institutions		Private Institutions	
	2015/16		N	Average	N	Average	N	Average
- Provide employees access to on-campus medical services		Yes	4	50%	30	53%	7	14%
- Provide employees access to on-campus fitness center(s)		Yes	4	75%	29	90%	7	100%
- Does institution have a formal employee wellness program?		Yes	4	50%	30	63%	7	71%
- Do participating employees receive discount on health ins or financial incentive?		Yes	2	50%	19	63%	5	60%
- Offer employees incentives of up to 30% of the cost of coverage for participating in a wellness program and meeting certain health related standards (increasing to 50% if appropriate). Is your institution offering incentives at this new level?		No	2	0%	19	11%	5	0%
Plan Details: PPO								
Employee only: Employee pays (monthly premium) (USD)		84	5	76	28	111	6	89
Employee only: Institution pays (monthly premium) (USD)		750	5	445	28	470	6	378
Employee only: Total Premium (USD)		834	5	521	28	581	6	466
Family: Employee pays (monthly premium) (USD)		241	5	254	28	372	6	343
Family: Institution pays (monthly premium) (USD)		593	5	1,088	28	1,208	6	1,093
Family: Total Premium (USD)		834	5	1,342	28	1,581	6	1,436
Plan has annual deductible: individual		250	4	361	24	489	6	533
Plan has annual deductible: family		750	4	723	24	1,160	6	1,167
Plan has annual out-of-pocket max: individual		2,000	5	2,628	27	2,696	6	2,858
Plan has annual out-of-pocket max: family		4,000	5	5,256	26	6,085	6	6,042
In-Network % of charges paid by plan		85%	5	86%	27	85%	6	82%
In-Network % of charges paid by member		15%	5	14%	22	18%	6	18%
Have out-of-network benefits		Yes	5	100%		93%		100%
Out-of-Network % of charges paid by plan		60%	5	66%	24	64%	6	57%
Out-of-Network % of charges paid by member		40%	5	34%	24	36%	6	43%
Plan Details: HMO								
Employee only: Employee pays (monthly premium)		81	3	62	13	96	3	88
Employee only: Institution pays (monthly premium)		753	3	457	15	499	3	409
Employee only: Total Premium		834	3	520	15	582	3	496

Appendix C

Benefits Comparison: Detail

	Year	Peers (Group of 25)		Public Research Institutions		Private Institutions	
	2015/16	N	Average	N	Average	N	Average
Family: Employee pays (monthly premium)	233	3	228	13	339	3	359
Family: Institution pays (monthly premium)	601	3	1,074	15	1,123	3	1,093
Family: Total Premium	834	3	1,302	15	1,417	3	1,451
Plan has annual deductible: individual	350			4	256		
Plan has annual deductible: family	1,050			4	744		
Plan has annual out-of-pocket max: individual	2,000	3	3,133	11	2,727	3	1,333
Plan has annual out-of-pocket max: family	4,000	3	6,267	11	6,182	3	2,667
In-Network % of charges paid by plan	80%	2	100%	11	96%	3	100%
In-Network % of charges paid by member	20%	2	0%	2	20%	3	0%
Have out-of-network benefits	No	2	0%		7%	3	0%
Out-of-Network % of charges paid by plan				1	80%		
Out-of-Network % of charges paid by member				1	20%		
Plan Details: HDHC							
Employee only: Employee pays (monthly premium)	21	4	12	20	40	6	40
Employee only: Institution pays (monthly premium)	813	4	457	22	446	6	401
Employee only: Total Premium	834	4	469	22	482	6	442
Employee only: Employee pays (monthly premium)	68	4	73	20	143	6	181
Employee only: Institution pays (monthly premium)	766	4	1,128	22	1,048	6	1,173
Employee only: Total Premium	834	4	1,200	22	1,178	6	1,355
Plan has annual deductible: individual	1,400	4	1,925	22	1,789	6	1,467
Plan has annual deductible: family	2,800	4	3,850	22	3,577	6	2,933
Plan has annual out-of-pocket max: individual	4,200	4	3,775	22	3,527	6	3,417
Plan has annual out-of-pocket max: family	8,400	4	7,550	22	6,911	6	6,783
In-Network % of charges paid by plan	85%	4	80%	22	81%	6	83%
In-Network % of charges paid by member	15%	4	20%	21	20%	6	17%
Have out-of-network benefits	Yes	4	100%		95%		100%
Out-of-Network % of charges paid by plan	60%	4	60%	20	63%	6	55%
Out-of-Network % of charges paid by member	40%	4	40%	19	39%	6	45%

Appendix C

Benefits Comparison: Detail

Retirement

Funding:

	Year 2015/16	UW	Peers (Group of 25)		Public Research Institutions		Private Institutions	
			N	Average	N	Average	N	Average
- Part of a state employee plan		-	4	75%	30	73%	7	0%
- Self-funded		Yes	4	25%	30	23%	7	100%
- Purchased insurance product		-	4	0%	30	3%	7	0%

Does the institution use more than one retirement services provider for institutionally-sponsored retirement plan?		Yes	5	80%	29	76%	7	86%
- If Yes, how many providers are authorized to receive institutional contributions to employee retirement accounts?		3.00	4	4.75	22	3.90	6	1.80

Institution offers employees Defined Benefits plan								
- Traditional plan		Yes	5	80%	31	81%	7	14%
- Cash balance plan		No	4	0%	28	4%	7	0%

Average retirement plan expenditure per covered employee		5,287	0	-	6	7,300	2	36,450
								<i>Average of 7,900 and 65,000</i>

Defined Contribution Plans: Details

403(b) plan: Faculty

Available		Yes	5	100%	31	100%	7	100%
Mandatory		Yes	5	20%	31	13%	7	14%
Primary Retirement Plan		Yes	5	60%	30	34%	6	50%
Institution contribution to plan		Yes	5	60%	31	35%	7	86%

Maximum % of annual salary institution contributes:

- Under 30 years of age		5.0%	2	8.7%	5	9.0%	4	7.9%
- 30 - 50 years of age		7.5%	2	8.7%	5	9.0%	4	7.9%
- 50 years and older		10.0%	2	8.7%	5	9.0%	4	7.9%

Appendix C
Benefits Comparison: Detail

	Year	UW	Peers (Group of 25)		Public Research Institutions		Private Institutions	
	2015/16		N	Average	N	Average	N	Average
<u>457(b) plan: Faculty</u>								
Available		Yes	4	100%	30	97%	5	100%
Mandatory		No	4	0%	28	11%	4	0%
Primary Retirement Plan		No	4	0%	28	0%	4	0%
Institution contribution to plan		No	4	0%	30	3%	5	0%
<i>Maximum % of annual salary institution contributes:</i>								
- Under 30 years of age								
- 30 - 50 years of age								
- 50 years and older								
<u>401(a) plan: Faculty</u>								
Available		No	4	75%	18	83%	1	100%
Mandatory			3	33%	15	73%	1	100%
Primary Retirement Plan			3	100%	15	93%	1	100%
Institution contribution to plan			4	100%	16	100%	1	100%
<i>Maximum % of annual salary institution contributes:</i>								
- Under 30 years of age			2	14.2%	9	11.3%	1	10.0%
- 30 - 50 years of age			2	14.2%	9	11.3%	1	10.0%
- 50 years and older			2	14.2%	9	11.3%	1	10.0%
<u>401(k) plan: Faculty</u>								
Available		No	2	100%	4	100%	1	100%
Mandatory			2	0%	4	0%	1	100%
Primary Retirement Plan			2	0%	5	0%	1	100%
Institution contribution to plan			2	0%	5	0%	1	100%
<i>Maximum % of annual salary institution contributes:</i>								
- Under 30 years of age							1	8.0%
- 30 - 50 years of age							1	8.0%
- 50 years and older							1	8.0%

Appendix C

Benefits Comparison: Detail

	Year	Peers (Group of 25)		Public Research Institutions		Private Institutions		
	2015/16	N	Average	N	Average	N	Average	
Tuition Benefits								
Employees: Faculty								
Does institution offer full-time employees tuition assistance for courses taken at your institution?	Yes	5	100%	31	100%	7	100%	
Are employees allowed to attend classes during normal working	Yes	4	50%	30	77%	6	50%	
What % of eligible tuition-related fees is the tuition benefit?		4	91%	23	89%	6	88%	
Spouses								
Is undergraduate tuition assistance to attend your institution available for:								
- Spouse of full-time employee	No	5	60%	31	77%	7	71%	
- Same-sex partner of full-time employee	No	3	100%	22	100%	5	100%	
- Opposite-sex partner of full-time employee	No	3	33%	23	70%	5	100%	
What % of eligible tuition-related fees is the tuition benefit?		3	88%	16	77%	4	62%	
Children								
Is undergraduate tuition assistance to attend your institution available for children of full-time employees?	No	5	60%	31	74%	7	100%	
Is number of credit hours eligible for assistance per calendar year limited?		5	40%	29	29%	7	71%	
- If Yes: what is the number of credit hours eligible for assistance?		2	18	4	26	2	10	
What % of eligible tuition-related fees is the tuition benefit?		3	92%	16	76%	5	79%	
Other								
Does institution have any tuition benefit for employees that pays partially or fully for courses taken at other institutions?	Yes	5	20%	31	29%	5	57%	
Current usage								
Percentage of employees currently receiving tuition benefits for either self or family		1	21%	11	14%	5	14%	
Percentage of employees currently receiving tuition benefits who are exempt				9	65%	2	73%	
Percentage of employees currently receiving tuition benefits who are non-exempt				9	35%	2	27%	
Percentage of dependents currently receiving tuition benefits who are exempt				6	56%	2	73%	
Percentage of dependents currently receiving tuition benefits who are non-exempt				6	27%	2	27%	

Appendix C
Benefits Comparison: Detail

Other Benefits

	Year	Peers (Group of 25)		Public Research Institutions		Private Institutions	
	2015/16	N	Average	N	Average	N	Average
Life Insurance: Basic							
Basic Life Insurance offered	Yes	5	100%	31	100%	7	100%
Basic life insurance plan includes Accidental D&D	Yes	5	60%	31	68%	7	71%
Employee pays any part of life insurance plan	No	5	60%	30	37%	7	0%
Institution's monthly premium per \$1,000 of insurance	\$0.15	2	\$0.13	20	\$0.26	7	\$0.12
Maximum amount							
If fixed: Maximum \$ amount	\$35,000	3	\$26,000	12	\$40,083		\$200,000
If based on salary: "X" multiplier	-	1	1.00	13	1.50		2.70
Life Insurance: Supplemental							
Employee can purchase "supplemental life insurance"	Yes	5	100%	31	97%	7	100%
If Yes: Medical evidence of insurability is required	Yes	5	80%	29	59%	6	83%
Maximum amount							
If additional amount fixed: Maximum \$ amount	\$1,000,000	3	\$533,333	8	\$762,500	3	\$1,166,667
If additional amount based on salary: "X" multiplier	-	2	7.00	19	4.95	4	4.50
Maximum \$ amount for spouse/domestic partner	\$500,000	5	\$200,000	26	\$142,654		\$224,000
Maximum \$ amount for eligible children	\$2,500	4	\$13,750	26	\$14,885		\$10,000
Short Term Disability							
Short-term disability offered	No -	5	40%	31	48%	7	86%
Enrollment in short-term disability is automatic		2	50%	15	40%	6	83%
If Yes: Who pays the premium?	UW has						
Institution only	faculty sick	2	50%	15	33%	6	67%
Employee only	leave policy.	2	50%	15	60%	6	17%
Both contribute		2	0%	15	7%	6	17%
Short Term Disability benefit is							
Percentage of salary				15	79%	6	100%
Flat amount				15	21%	6	0%
If flat amount: \$ per week				1	\$250		

Appendix C

Benefits Comparison: Detail

	Year	UW	Peers (Group of 25)		Public Research Institutions		Private Institutions	
	2015/16		N	Average	N	Average	N	Average
Long Term Disability								
Long-term disability offered	Yes	5	100%	31	97%	7	100%	
If applicable: Who pays the premium?								
Institution only	No	5	20%	28	36%	6	50%	
Employee only	No	5	60%	28	32%	6	0%	
Both contribute	Yes	5	20%	28	32%	6	50%	
How is long-term disability defined?								
Can't perform OWN occupation	No	5	80%	28	39%	7	29%	
Can't perform ANY occupation	No	5	0%	28	14%	7	14%	
Can't perform OWN occupation after "X" weeks & ANY thereafter	Yes	5	20%	28	39%	7	57%	
Does LTD have a pre-existing clause?								
If Yes: How many months duration	12	3	9	17	9.9	4	9.75	
Number of months employee on LTD can continue on ins plans at employee rate	3	2	12	11	10%	4	925%	
Percent of monthly earnings paid by LTD	60%	5	62%	26	62%	7	60%	
Does LTD plan have a maximum monthly benefit?								
If Yes: maximum monthly \$ amount (comps: average)	\$6,000	5	\$11,600	23	\$9,883	6	\$15,283	
If Yes: maximum monthly \$ amount (comps: median)		5	\$10,000	23	\$10,000	6	\$13,250	
Does your LTD plan allow benefits to be paid free of Federal Tax?	Yes	5	60%	23	52%	6	33%	
Child Care								
Institution offers child daycare benefits	Yes	5	40%	30	43%	7	71%	
If Yes: Types of child daycare offered								
On-site daycare managed by employees	No	2	100%	13	77%	4	50%	
On-site daycare managed by contractor	Yes	2	50%	13	8%	5	20%	
Off-site daycare managed by employees	No	2	0%	13	8%	4	0%	
Off-site daycare managed by contractor	Yes	2	50%	13	15%	4	0%	
Institution offers sick-child daycare benefits								
If Yes: Types of child daycare offered	Yes	2	0%	13	15%	5	40%	
On-site sick-child daycare managed by employees	No	0		2	50%	2	0%	
On-site sick-child daycare managed by contractor	No	0		2	0%	2	0%	
Off-site sick-child daycare managed by employees	No	0		2	0%	2	0%	
Off-site sick-child daycare managed by contractor	Yes	0		2	50%	2	50%	
Institution subsidizes the cost of daycare								
If Yes: Approximate % of cost paid by institution	-	-	-	-	-	1	25%	

Appendix C
Benefits Comparison: Detail

	Year	Peers (Group of 25)		Public Research Institutions		Private Institutions	
	2015/16	N	Average	N	Average	N	Average
Paid Time off	UW						
Number of paid holidays each year (actual # of days)	10	4	13	30	11	7	10%
Paid time-off offered	Yes	5	80%	31	97%	7	100%
Institution has Sabbatical Leave (Faculty)	Yes	4	75%	27	93%	7	86%
If Yes: Typical number of years between each	7	2	4	13	5	1	4
Institution allows Unpaid Leave (Faculty)	Yes	4	100%	27	100%	6	100%
If Yes: Maximum number of days		1	365	8	131	3	303
Institution has paid leave (over and above vacation and sick leave) for new parents	No	4	25%	21	29%	7	57%
If Yes: For how many weeks		1	6	6	8	3	8

Appendix D

Livability and Cost of Living

Environment	Year	UW (MSA)	25 Peers (MSA)	
			Median	UW (%-ile)
Overall Livability (AARP) (0 - 100)	2016	57.42	51.30	93%
Neighborhood		56.58	49.49	82%
Housing		54.03	48.39	82%
Environment		63.21	53.29	97%
Health		64.53	56.83	76%
Transportation		52.54	51.46	65%
Opportunity		57.99	52.20	73%
Engagement		53.07	52.10	63%
Cost of Living (Multiple Sources)	2016			
Required pre-tax income (family of 4) (MIT)		67,758	62,558	69%
Max state income tax in % (Tax Foundation)		0.00%	5.75%	0%
Sales tax % (TaxRate.com)		9.22%	7.00%	100%
Median sf price single family home (Zillow)		247.4	162.6	69%

Class B Legislation
Faculty Code and Governance
[Policies: Terms & Conditions, Chapter 51](#)
Faculty Leave and Vacations

Rationale:

Leave policy for non-birth parents among UW Faculty

All professional and classified staff at UW—mothers and fathers, birth and non-birth parents—get paid leave to care for their newborn or newly placed adopted or foster children. At many of our peer public universities, *all* faculty members get paid parental leave to care for the faculty member's child after birth, adoption or foster placement. However, among UW faculty, birth mothers get paid leave only to accommodate their 'temporary disability due to pregnancy, childbirth or recovery'. UW faculty who are non-birth parents can only avail themselves of *unpaid* leave to care for their healthy newborn or newly placed adopted or foster children.

To correct this inequity for non-birth parents among the UW faculty, the Faculty Council on Benefits & Retirement (FCBR) recommends amendments to Chapter 51 of the Faculty Code and Governance (FC&G). The amendments would extend paid leave benefits to UW faculty who are non-birth parents, allowing them to care for children after birth, adoption, foster care placement, or assumption of primary custodial care.

In addition, the FCBR recommends an update of the UW faculty leave policies (laid out in Chapter 51 of the FC&G and last revised in 1996) to reflect the statutory requirements of the Washington State Family Care Act (FCA) of 2002.

In the following sections, we provide highlights of the (a) current parental leave policy for UW faculty, (b) the policy for UW Professional and Classified Staff, (c) the parental leave policy at peer institutions and (d) the language of the proposed amendments to Sections 51-01 and 51-11 of the FC&G.

A. Parental Leave for UW faculty¹

UW faculty leave benefits around birth or adoption of a child are as follows:

- Female faculty members can use up to 90 calendar days of paid faculty sick leave "because of temporary disability due to pregnancy, childbirth, or recovery therefrom", with "appropriate documentation from a physician to evidence illness or disability."
- Under the Washington State Family Care Act (FCA), an employee can use paid leave to care for a spouse with a pregnancy-related disability, while the spouse is under "continuing treatment by ... a provider of health care services"². {The FCA also allows employees to use available paid sick leave to care for a sick minor child; for a spouse, registered domestic partner, parent, parent-in-law, or grandparent with a serious or emergency health condition; or for a sick adult child who is incapable of self-care because of a physical or mental disability³.}
- UW faculty members who are non-birth parents can take unpaid leave, for up to 6 months or two successive quarters, to care for a newborn or newly adopted or placed child if taken within 12

¹ <http://www.washington.edu/admin/rules/policies/FCG/PTCCH51.html>

² <http://www.lni.wa.gov/WorkplaceRights/LeaveBenefits/FamilyCare/LawsPolicies/FamilyCare/default.asp>

³ In the FCA, "Child" means a biological, adopted, or foster child, a stepchild, a legal ward, or a child of a person standing in loco parentis who is: (a) Under eighteen years of age; or (b) Eighteen years of age or older and incapable of self-care because of a mental or physical disability

months of the child's birth or placement. During this leave, the University pays the employer-paid portion of health benefits coverage for up to 12 weeks, as required by FMLA⁴.

B. Parental Leave for UW professional and classified staff⁵

The University of Washington provides parental leave for all professional and classified staff—mothers and fathers, birth and non-birth parents. The amount of parental leave time "to bond with newborn or newly placed adopted or foster child" ranges from 4 months (for professional, contract/classified and temporary staff) to 6 months (for classified/non-union staff). Staff members are allowed to take parental leave at any time during the 12 months following the child's birth, adoption, or placement.

Professional and Classified staff can receive pay during parental leave using any of their accrued paid leaves, such as sick leave (up to 30 days in most cases), annual leave, personal holiday leave, holiday credit, compensatory time, or discretionary leave (professional staff only). Staff members also have the option to take leave without pay.

C. Faculty Parental Leave policies at peer public Universities

Many of our peer public universities offer parental leave to non-birth parents. We provide a sampling of the policies below (the full comparison with all GCS institutions is in Appendix 1):

- The University of Colorado offers 18 weeks (paid) leave for 9-month faculty to care for the faculty member's child within twelve months of the birth, adoption, or foster care placement of the child, using accrued sick leave. If the faculty member exhausts all accrued sick leave before the end of the eighteen-week period, then they may continue the leave for the remainder of the period at half pay with full benefits. Faculty on 12-month contracts can get up to 6 months leave.
- The University of Massachusetts offers 1 semester paid leave, using sick leave (and then sick leave bank) to cover the time.
- The University of Maryland offers 8 weeks of paid Parental Leave, creditable first to sick and personal leave, with balance supplemented as needed to reach 8 weeks.
- Rutgers in New Jersey offers 8 weeks of paid release time for non-birth faculty.
- The University of California offers 1 quarter of "active service-modified duties" to non-birth parents. For teaching faculty, the modification of duties is either partial or full relief from teaching. For other academic appointees, the modification of duties is a reduced workload.

D. Proposed amendments to Sections 51-01 and 51-11 of the FC&G

To promote equity among faculty who are birth and non-birth parents, equity across all UW employees, and to stay competitive with our peer public universities, the University of Washington should extend paid parental leave to UW faculty who are non-birth parents. This can be done using the existing sick leave benefit, as is the case at many peer institutions and with professional & classified staff at UW.

To enable the above we recommend the following:

1. Changing the title of Section 51-01 from "Faculty Sick Leave" to "Faculty Sick **and Family Care** Leave."

⁴ <http://ap.washington.edu/cms/wp-content/uploads/FMLA-Info-Summary-2015.pdf>

⁵ <http://hr.uw.edu/ops/leaves/parental-leave/>

2. In Section 51-01.A, adding the clause: **“to care for a biological, adopted, or foster child, legal ward, or any other child under the age of 18 for whom the faculty member stands *in loco parentis*, within twelve months of the birth, adoption, foster care placement, or assumption of parental responsibility.”** This clause would extend to all UW faculty—mothers and fathers, birth and non-birth parents—a paid parental leave benefit.
3. Effecting minor amendments in the rest of Chapter 51 that would follow from the above changes.

Further, to update the current UW Faculty leave policies to reflect the statutory requirements of the Washington State Family Care Act, we recommend the following additional change:

1. In Section 51-01.A, replacing “to care for a child of the faculty member under the age of 18 with a health condition that requires treatment or supervision” with “to care for the faculty member’s child or family member in accordance with the provisions of the Washington State Family Care Act of 2002.” This expanded definition would reflect the requirements of the Washington State Family Care Act.

Class B Legislation
Faculty Code and Governance
[Policies: Terms & Conditions, Chapter 51](#)
Faculty Leave and Vacations

Section 51-01 Faculty Sick and Family Care Leave

- A. In the case of an illness or disability of a faculty member, his or her salary shall be continued for a period not to exceed 90 calendar days. Faculty sick and family care leave may be taken ~~to care for a child of the faculty member under the age of 18 with a health condition that requires treatment or supervision, or because of temporary disability due to pregnancy, childbirth, or recovery therefrom:~~
- to care for the faculty member's child or family member in accordance with the provisions of the Washington State Family Care Act of 2002 and any other relevant state or federal legislation;
 - because of temporary disability due to pregnancy, childbirth, or recovery therefrom;
 - to care for a biological, adopted, or foster child, legal ward, or any other child under the age of 18 for whom the faculty member stands *in loco parentis*, within twelve months of the birth, adoption, foster care placement, or assumption of parental responsibility.
- B. Applications for faculty sick and family care leave shall include appropriate documentation ~~from a physician to evidence illness; or disability; or birth, adoption, foster care placement, or assumption of parental responsibility.~~
- C. Subsection A of this section applies only to periods during which the faculty member is entitled to receive salary from the University. Faculty sick leave salary continuation may not exceed 90 days during the period July 1 to June 30, except that a leave begun prior to July 1 that continues beyond that date shall not exceed 90 days with respect to the cause illness or disability for which such leave was granted.

Section 51-11 Family Leave

- A. Upon written request a faculty member shall be granted a family leave of absence without pay for the following reasons: to care for the faculty member's child; to care for the faculty member's spouse, parent, or other family member who has a serious health condition; or because of a serious health condition that makes the faculty member unable to perform his or her job (after exhaustion of the faculty sick and family care leave benefits referred to in Section 51-01 above). The period of leave shall normally not exceed six calendar months or two successive academic quarters. An extension beyond this period must be approved by the Provost.
- B. A request for family leave should be made to the department chair (or dean of an undepartmentalized school or college) as soon as reasonably possible, and, when the reason for the leave is foreseeable, not less than 30 days prior to the date such leave is scheduled to begin. Requests for family leave resulting from medical conditions shall include appropriate documentation from a physician.
- C. Pursuant to the Family and Medical Leave Act of 1993, when, after exhaustion of sick and family care leave benefits, family leave is taken for purposes of caring for the employee's newborn or newly adopted or foster child; to care for the employee's spouse, son, daughter, or parent who has a serious health condition; or for a serious health condition that makes the employee unable to perform his or her job ~~(after exhaustion of sick leave benefits)~~; the faculty member may be eligible for paid medical benefits for up to 12 weeks from the initiation of the leave. To receive such benefits, a faculty member requesting family leave must notify the Office of the Provost. The faculty sick and family care leave policy described in this section fulfills the University's obligation under the Family and Medical Leave Act of 1993 and the benefits described in this section are not additive thereto.

Endorsed by the Faculty Council on Women in Academia June 12, 2017

Appendix 1 – Parental Leave Comparison for GCS Peer Institutions			
Peer Institutions	Birth Mother	Non-birthing Parent	Comparison to UW
UW	<ul style="list-style-type: none"> 90 days paid disability leave for childbirth pregnancy or recovery. Additional Unpaid Family Leave up to 6 months or 2 quarters to care for newborn or newly adopted or foster child 	<ul style="list-style-type: none"> 90 days paid sick leave only to care for minor child <u>with health condition needing treatment or supervision</u> Unpaid Family Leave up to 6 months or 2 quarters to care for new child 	N/A
UC Boulder UC Denver	<p>9 month Faculty:</p> <ul style="list-style-type: none"> 18 weeks (paid) leave to care for the faculty member's child within twelve months of the birth, adoption, or foster care placement of the child, using accrued sick leave. If the faculty member exhausts all accrued sick leave before the end of the eighteen-week period, then they may continue the leave for the remainder of the period at half pay with full benefits. <p>12 month Faculty:</p> <ul style="list-style-type: none"> 6 months of parental leave, during which time they may use accrued sick leave, accrued vacation leave, and/or leave without pay to care for member's child within 12 months of the birth, adoption, or foster care placement 	<p>9 month Faculty:</p> <ul style="list-style-type: none"> 18 weeks of (paid) leave to care for the faculty member's child within twelve months of the birth, adoption, or foster care placement of the child, using accrued sick leave. If the faculty member exhausts all accrued sick leave before the end of the eighteen-week period, then they may continue the leave for the remainder of the period at half pay with full benefits. <p>12 month Faculty:</p> <ul style="list-style-type: none"> 6 months of parental leave, during which time they may use accrued sick leave, accrued vacation leave, and/or leave without pay to care for the member's child within 12 months of the birth, adoption, or foster care placement 	Substantively more generous for both, birth mother and non-birthing parent

UMd, College Park UMd, Baltimore	<ul style="list-style-type: none"> • 8 weeks paid Parental Leave, creditable first to sick and personal leave, with balance supplemented as needed to reach 8 weeks • Runs concurrently with 12 weeks unpaid FMLA, can use accrued sick leave to cover 	<ul style="list-style-type: none"> • 8 weeks paid Parental Leave, creditable first to sick and personal leave, with balance supplemented as needed to reach 8 weeks • Runs concurrently with 12 weeks unpaid FMLA, can use accrued sick leave to cover 	Substantively more generous for non-birthing parent
UMass Amherst	<ul style="list-style-type: none"> • 1 semester paid leave, must use sick leave and then sick leave bank to cover • Runs concurrently with 12 weeks unpaid FMLA 	<ul style="list-style-type: none"> • 1 semester paid leave, must use sick leave and then sick leave bank to cover • Runs concurrently with 12 weeks unpaid FMLA 	Substantively more generous for both
UC, Davis UC, Irvine UCLA UCSD	<ul style="list-style-type: none"> • Paid Childbearing Leave, 6 weeks or greater with medical approval • Unpaid Pregnancy Disability Leave up to total of 4 months • Runs concurrently with unpaid FMLA 12 weeks • Remainder quarter ASMD • 1 additional quarter ASMD • Unpaid Parental Leave up to 1 year 	<ul style="list-style-type: none"> • Unpaid FMLA 12 weeks • 1 quarter ASMD (if 50% parental responsibility) • Unpaid Parental Leave up to 1 year 	Slightly <i>more</i> generous for both
Rutgers, New Brunswick Rutgers Camden Rutgers Newark RNJMS	<ul style="list-style-type: none"> • 6 weeks paid Recuperative Leave • 8 weeks paid Release Time • Runs concurrently with 12 weeks unpaid FMLA 	<ul style="list-style-type: none"> • 8 weeks paid Release Time • Runs concurrently with 12 weeks unpaid FMLA 	Substantively more generous for non-birthing parent
University of Connecticut	<ul style="list-style-type: none"> • Paid disability 6+ weeks with medical authorization • Unpaid Parental Leave 6 months (continued eligibility for health insurance) • Runs concurrently with 12 weeks unpaid FMLA 	<ul style="list-style-type: none"> • 12 weeks unpaid FMLA • Unpaid CT State Statute 5-248a 24 weeks, runs concurrently • Unpaid Parental Leave 6 months (continued eligibility for health insurance) 	Similar to UW
University of Virginia	<ul style="list-style-type: none"> • Paid short term disability up to 6 months, with medical authorization 	<ul style="list-style-type: none"> • 3 weeks paid Parental Leave • 9 weeks unpaid Parental Leave 	Substantively more generous for both

	<ul style="list-style-type: none">• 3 weeks paid Parental Leave• 9 weeks unpaid Parental Leave• Runs concurrently with 12 weeks unpaid FMLA	<ul style="list-style-type: none">• Runs concurrently with 12 weeks unpaid FMLA	
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