

**UNIVERSITY COMMITTEE ON FACULTY WELFARE (UCFW)
2021-22 ANNUAL REPORT**

TO THE ASSEMBLY OF THE ACADEMIC SENATE:

Under [Senate Bylaw 175](#), the University Committee on Faculty Welfare (UCFW) considers and reports on matters concerning the economic welfare of the faculty, including salaries, benefits, insurance, retirement, housing, and conditions of employment. UCFW met ten times during the 2021-22 academic year, and the major actions and discussions of ongoing issues are highlighted in this report.

UCFW has two semi-permanent task forces with separate memberships and with particular expertise in: (1) the University of California Retirement System (UCRS) including its policies and its investments (the Task Force on Investment and Retirement, TFIR); and (2) the University's health plans for employees and retirees (the Health Care Task Force, HCTF). These task forces monitor developments and carry out detailed analyses of questions and issues in their respective areas and report back to UCFW for further action. UCFW is indebted to the extraordinary commitment and skills of our task force leadership, David Brownstone (TFIR) and Michael Ong (HCTF). These two task forces spend a great deal of time in consultation with systemwide Human Resources (HR). Many of these consultants, along with Academic Personnel and Programs and others from the Office of the President, also regularly attend UCFW meetings and lend their expertise to our discussions. We are indebted to these consultants, and they are individually acknowledged at the end of this Report.

COVID-19 IMPACTS TO ADVANCEMENT, WORK-LIFE BALANCE, AND INSTRUCTIONAL DELIVERY

UCFW members uniformly agreed that a central issue for this year was how to mitigate the negative impacts of the pandemic on faculty career trajectories and overall morale, especially given the unequal impacts of job disruption on a) individuals and members of specific types of scholars, namely those whose research or scholarly activities experienced severe and lengthy disruptions due to campus and performance venue closures, and b) individuals or members of specific demographic groups for whom the pandemic markedly increased their dependent care duties, especially single parents, women, and persons of color whose communities were hard hit by the pandemic. UCFW devoted time at each meeting to hearing in detail from the campuses about their efforts, short-comings, and surprises in dealing with COVID-19 impacts to advancement, work-life balance, and instructional delivery. Implementation of revised active duty/modified service guidelines was closely monitored, and revealed common patterns of underutilization by female faculty and those from underrepresented backgrounds. Junior faculty and those with caregiving responsibilities reported the highest levels of stress. Long-standing deficits in child care access and affordability were made visible and amplified by the pandemic. Multi-format and asynchronous instructional delivery significantly increased workloads, while compensation remained largely flat during fiscal year 2021-22. Negative impacts to

research productivity and creative output deserve special consideration in academic reviews. UCFW summarized its findings in a letter to Council and, called for revisions to the Academic Personnel Manual to codify these considerations into a more holistic review of faculty.

Campus crisis planning continues, but discussions to date have focused on medical specifications, eschewing humanistic considerations that may affect logistics of guideline implementation. The enforcement of mandates in the classroom or laboratory raises questions about the responsibilities of faculty and concerns about privacy. UCFW will continue to monitor outcomes and faculty experiences.

FACULTY WELFARE

Housing: A lack of affordable housing proximate to UC campuses is pricing many employees out of working for the university, and it is straining the finances of many faculty, especially in expensive housing markets. Planned projects at some campuses will open slowly and not fully address the needs. Affordable student housing is a similar issue. Discussions focused on shared-equity loans, renter subsidy options, and other non-single family dwelling programs. UCFW/TFIR supplied a letter and presentation to Council describing the issue and outlining potential options to address it. The new zero-interest loan program may help, but more resources are needed.

Retirement Transition: Inadequacies stemming from both software changes and staffing shortages have led to chronic unresolved concerns with the Retirement Administration Service Center (RASC); the COVID crisis has only exacerbated these concerns since it highlighted RASC limitations. A new Vice President has begun to address these issues by hiring a permanent director for RASC and securing an augmented budget. UCFW will continue to monitor the improvements closely.

Child Care: UCFW has collected information about the hardships to faculty, staff, and students with families resulting from the high cost and the lack of child care options. The COVID pandemic highlighted and worsened these conditions, and the situation has not improved. UCFW forwarded a memo to Council, which was endorsed and forwarded to President Drake, detailing these concerns and requesting a systematic effort to collect data pertaining to childcare costs and access systemwide. A dedicated, executive-led initiative may be needed.

CASH COMPENSATION

A multi-year salary plan designed to close the gap with the Comparison 8, met the goals of the first year (2018), but in 2019, the plan was scaled back following underinvestment by the state and other budgetary concerns. In light of COVID impacts in 2020, salaries were frozen (except for merits). Budget improvements for the state allowed a 3% increase to

faculty and staff on July 1, 2021, but it is now expected that the plan to close the salary gap will be extended by several years.

A new budget compact with the governor has promised a 5% base budget increase to UC for the next 5 years, and the faculty received 4% to the scales this year. It is hoped that subsequent years will see greater increases both to close the market gap and to compensate for high inflation, and together with UCPB, UCFW forwarded a memo to Council urging continued efforts to improve faculty salary competitiveness.

HEALTH AND WELFARE BENEFITS

UCFW and HCTF continued to monitor the operations of UC Care. Issues surrounding pharmacy formulary changes and billing transparency were the most common concerns. HCTF also engaged with UC Care to analyze the benefits survey conducted in the fall of 2021. Although assessment continues, findings of dissatisfaction in the mental health area were on-trend, unfortunately. TFIR hopes that future surveys, whether from UC Care or Human Resources, can include financial awareness and preparedness questions, including the impact of student loans.

Comprehensive Access returned as a topic before the Senate this year, stimulating much discussion at HCTF and UCFW. The Regents adopted language aimed at balancing access to UC quality care and non-discrimination principles, and a new Presidential policy is being developed. A joint Senate-administration oversight committee, the Joint Clinical Advisory Committee, was formed this year. HCTF will monitor developments closely, especially in a post-Dobbs era.

UCFW and HCTF recommended the addition of fertility benefits to the standard suite of coverage available to all UC employees. HR is investigating affordability,

A HCTF working group focusing on behavioral health access and affordability has written a report which the next UCFW will consider.

RETIREMENT ISSUES

TFIR continued its close work with the administration to make more user-friendly the Fidelity brokerage window investment options, an effort led by the Office of the Chief Investment Officer, in conjunction with Human Resources. TFIR also supported an OCIO initiative to remove fossil fuel holdings from the Retirement Savings Program.

TFIR worked to improve communications and planning tools related to the “Second Choice” window of the 2016 UCRP Tier, wherein certain eligible employees may change their initial pension election from defined contribution plan to defined benefit plan. This year is the first year the new election provision is available as this is the first fifth year of the Tier. For both initial elections and the “Second Choice” window, a financial modeling

tool was created by TFIR for use by prospective and new hires, as well as those facing their second choice.

OTHER POLICY ISSUES AND SYSTEMWIDE REVIEWS:

Academic Personnel Manual Revisions: UCFW opined on the following:

- 025 and 671 (Conflict of Commitment and Outside Activities of Faculty Members)
- 715 and 760 (Leaves of Absence/Family and Medical Leave, and Family Accommodations for Childbearing and Childrearing)
- 759 (Leaves of Absence/Other Leaves without Pay)

CORRESPONDENCE:

Beyond submitting opinions and recommendations on the topics above, UCFW opined on the following matters of systemwide import:

- Proposed Policy on Abusive Conduct in the Workplace
- Department Political Statements
- The Negotiated Salary Trial Program
- Sexual Violence and Sexual Harassment
- Student Loan Debt
- Stewardship of UC Research Data

ACKNOWLEDGEMENTS:

UCFW is indebted to its consultants and guests, without whom the committee's work could not be done:

Academic Affairs: Provost Michael Brown;

Academic Personnel and Programs: Vice Provost Susan Carlson and Academic Policy and Compensation Data Analyst Gregory Sykes;

UC Health: Executive Vice President Carrie Byington; Executive Director of UC Self-Funded Health Plans Laura Tauber;

Human Resources: COO Rachael Nava, Vice President Cheryl Lloyd; Senior Director of Health and Welfare Benefits Susan Pon-Gee;

Office of the Chief Financial Officer: CFO Nathan Brostrom;

Office of the Chief Investment Officer: CIO Jagdeep Bachher, Associate CIO Arthur Guimaraes, and Director of Defined Contributions Products Marco Merz.

We are particularly grateful for the involvement, support and guidance from the Senate leadership, Chair Robert Horwitz and Vice Chair Susan Cochran, as well as the advice and perspective provided by Senate Executive Director Hilary Baxter. Finally, the committee is highly indebted to Kenneth Feer who has provided able staff support.

Respectfully yours, UCFW 2021-22

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