

Indiana University
BLOOMINGTON FACULTY COUNCIL
September 21st, 2021
Presidents Hall - Franklin Hall
2:30 P.M.- 4:30 P.M.

Members Present: John Applegate, Karen Banks, Carolyn Calloway-Thomas, John Carini, Rachel Cohen, David Daleke, Allen Davis, Madeline Dederichs, Anna Deeds, Constantine Deliyannis, J Duncan, Kelly Eskew, Lessie Frazier, Jason Gold, Lucia Guerra-Reyes, Israel Herrera, Colin Johnson, Pete Kolbaum, Ben Kravitz, Robert Kunzman, Margaret Lion, Nancy Lipschultz, Annette Loring, Valentina Luteka, Theodore Miller, Eliza Pavalko, Chuck Peters, Rob Potter, Cathrine Reck, DAN Sacks, Steve Sanders, Jim Sherman, Katie Shy, Marietta Simpson, Kashika Singh, Rebecca Spang, Dubravka Svetina, Lisa Thomassen, Samantha Tirey, John Walbridge, Stephen Wyrzynski, Jeffrey Zaleski, Kurt Zorn

Members Absent: Jim Ansaldo, Ton Arcuri, Hussein Banai, Danielle DeSawal, Kaitlin Doucette, Jackie Fleming, Brian Gill, Anthony Giordano, Justin Hodgson, Jessica Lester, Scott Libson, Pedro Machado, Jill Nicholson-Crotty, Miriam Northcutt Bohmert, Courtney Olcott, Massimo Ossi, Angie Raymond, Elizabeth Shea, Thomas Sterling, Erik Willis

Guests: Sue Dukeman, Doug Knapp (alternate), Ben Robinson, Kaitlyn Rourke (alternate), Christan Royer, Wen Qi (alternate)

AGENDA:

1. **Approval of the [minutes of April 13, 2021](#)**
2. **[Memorial Resolution for Peter Jacobi](#)**
3. **Executive Committee Business (10 minutes)**
Marietta Simpson, Faculty President

[B1-2022 Bloomington Faculty Council Members 2021-2022](#)
[B2-2022 Bloomington Faculty Council Committees 2021-2022](#)
[B3-2022 Summary of Actions Taken 2020-2021](#)

4. **Presiding Officer's Report (10 minutes)**
John Applegate, Interim Provost

5. **Question/Comment Period**

Faculty who are not members of the Council may address questions to Interim Provost Applegate or President Simpson by emailing bfcoff@indiana.edu. Questions should be submitted no less than two business days before the meeting.

6. Introduction to the Bloomington Chapter of the American Association of University Professors (5 minutes)

Ben Robinson, AAUP Bloomington Chapter President

Israel Herrera, AAUP Bloomington Chapter Executive Committee member

7. Update from IU Human Resources (20 minutes)

Nancy Nelson, Co-chair of the Benefits Committee

Jim Sherman, Co-chair of the Benefits Committee

Christan Royer, Director, Benefits

Sue Dukeman, Benefits Specialist, Retirement

8. Questions/Comments on the update from IU Human Resources (10 minutes)

9. Reports from the faculty grievance and misconduct committees (15 minutes)

Barbara Dennis, Chair of the Faculty Mediation Committee, 2020-2021

Amy Piper, Chair of the Faculty Board of Review, 2021-2022

[B5-2022: 2020-2021 Faculty Misconduct Review Committee Report](#)

10. Questions/comments on the reports from the faculty grievance and misconduct committees (15 minutes)

TRANSCRIPT:

APPLEGATE: Good afternoon, everybody. And let us let us come to order in this first full BFC meeting of the 2021-2022 academic year.

AGENDA ITEM ONE: APPROVAL OF MINUTES

APPLEGATE: Our first order of business is approval of the minutes of April 13th, 2020. Are there any corrections for those minutes? If not, I will entertain a motion to approve the minutes.

I see a motion.

Second? Second.

Thank you. All in favor please signify by saying aye.

ALL: Aye.

APPLEGATE: Any opposed?

Okay. One order of business down.

AGENDA ITEM TWO: MEMORIAL RESOLUTION FOR PETER JACOBI

APPLEGATE: The next is a memorial resolution for Professor Peter Jacobi. I'd like to call on Vice Provost Eliza Pavalko to read the resolution.

PAVALKO: Two weeks before Peter Jacobi's death on Christmas Eve, 2019, at age 89, two IU journalism colleagues treat-ed him to lunch. It was on the anniversary of the 1941 attack on Pearl Harbor, likely prompting Jacobi — a self-described “refugee from Nazi Germany”— to talk about the ominous signs he saw in contemporary American politics. The memories of his native Germany seemed uppermost in his mind.

Peter Paul Jacobi was born in Berlin, Germany, in 1930. His father —Karl August Paul Jacobi —was a hairdresser and stylist for opera and classical music performers. Trouble loomed for his father, an outspoken critic of Hitler. Peter's mother, Liesbeth Kron Jacobi, was Jewish. Inevitably, the family was “blacklisted.”

Before Kristallnacht, “the night of broken glass,” in 1938 — when Peter was eight — the family fled. Jerome Kern, famous American composer, Lorenz Hart, lyricist, and Edna Ferber, Pulitzer Prize winning novelist — likely because of the elder Jacobi's connection to the Berlin arts community — arranged sponsorships for the family to come to America. It was through Ellis Island that their new life began, with settlement in Chicago.

From that new beginning in America's “second city,” Peter Jacobi would fashion a distinguished professional life. His storied career, from which he never truly retired, melded unique journalistic talent, a gift for teaching, and a love of music and the arts.

In Germany, Peter had been bullied and beaten by a physical training teacher in school, as told to his son Keith. The Chicago experience would be different. He thrived in public schools, learning English quickly and becoming a U.S. citizen at 14.

At Chicago's Sullivan High School, Jacobi worked on the student newspaper, where he discovered what IU emeritus journalism dean Trevor Brown called his love of the “music of words.” That led Jacobi to study at the Medill School of Journalism at Northwestern University, where he also wrote for the student paper, The Daily Northwestern. He earned a bachelor's degree in journalism in 1952 and stayed on for a master's degree awarded in 1953.

After graduate work, Jacobi was drafted into the U.S. Army, serving two years. In late 1955, he returned to Chicago and became a news editor for WGN, the ABC network radio station, and later moved to WMAQ, the NBC-TV affiliate there, also as an editor.

A versatile writer, Peter found the traditional role of public affairs journalist was easy for him, but the lure of the arts was strong. His son Keith remembers, “My father always had music in his head,” likely harkening back to his youth in Berlin. He became editor of the Lyric Opera (of Chicago) News and hosted a weekly radio show, “A World/Evening of Opera,” on WBEZ-FM,

an educational radio station. At the same time, he was theater critic for the Chicago Daily News, important in those days because of the prominence of the Goodman Theater.

While enjoying a stimulating career combining the arts and journalism, Jacobi also was discovering his gifts as a teacher. After returning to Chicago and becoming a broadcast journalist, he began teaching as a professional lecturer at his alma mater, the Medill School at Northwestern. He became one of its most popular lecturers and in 1963 was appointed to a faculty position. He rose to full professor and also was associate dean of the Medill School for a decade. That stellar success at Northwestern would be marked by Jacobi's being in the inaugural class of Medill's Hall of Achievement in 1997.

Jacobi was widely known as a teacher of journalistic writing as "creative nonfiction." He thought the notions of "style" and the writer's "voice" were applicable to all of journalism. And he rose to national prominence when he became vice president for instruction in 1981 at Jack Hilton Inc., a large New York City communication consultancy. There he taught workshops in multi-media writing throughout the country and consulted with a variety of clients — including state governors and other political and business leaders — on how to present them-selves in media.

It was at Indiana University, however, that Jacobi's immense love of music and the arts would be fully harnessed to his extraordinary gifts as a teacher of journalistic writing for all media. Joining IU's School of Journalism as full professor in 1985 —at a time when the program was recognized as one of the most innovative in the country —Jacobi knew the world-class IU School of Music would be the creative engine for the final chapter of his journalistic and teaching life. He was truly "home."

At IU journalism, Jacobi created courses on reporting the arts and burnished his longstanding reputation as a great teacher. He was a "star" on the faculty of the Gannett Foundation-supported national workshop for beginning journalism teachers held each summer at IU Bloomington. And, of course, he plunged enthusiastically into the thriving music and arts culture of the IU campus, Bloomington, and the state. He was appointed to the Indiana Arts Commission and later became its chair.

Jacobi began writing for Bloomington's *The Herald-Times* during his first semester at IU, with then-editor Bob Zaltsberg celebrating the newspaper's good fortune at having a classical music reviewer "of Peter's quality and drive." Over the years, he wrote hundreds of reviews of campus and community musical performances. And for many regular attenders of those events, seeing Jacobi seated in his favorite locations at the Musical Arts Center, Auer Hall or Ford-Crawford Hall meant the concert could commence. For those close enough to catch a glimpse, watching Peter make cryptic notes on the event programs —no reporter's notebook for him — was a ritual. Those program notes and his enormous powers of concentration always produced enriching insights for the thousands of readers of his reviews. Janis Starcs, Mary Alice Cox, and Trevor Brown were some of them.

Starcs, longtime proprietor of Bloomington's Caveat Emptor bookshop and Jacobi's friend, often sat next to him at events. He wrote that Peter's reviews "...were tactful and generous, especially of the many student performers...." Cox, Friends of Music board president who also sat near

Jacobi at performances, wrote, “His columns were always informative, and he was a tireless supporter of students.” Brown, emeritus IU journalism dean said Jacobi’s “... sensitivity to his role in preparing student journalists and musicians for public performance distinguished” both his teaching and criticism. Brown added, “He held these apprentices to the highest professional standards with a gentle, inspiring touch.”

Jacobi’s published reviews and large presence in the music and arts life of the university made him a one-person institution. The Society of the Friends of Music of the IU Jacobs School recently established the Peter Jacobi Scholarship for music students, honoring Jacobi’s “exceptional character and lifelong passion for the arts... [and his] masterful ability to inform and inspire audiences through his columns.”

He officially retired from IU in 1999. The retirement celebration that summer was at Woodburn House, the perfect place to honor Jacobi. The extraordinary IU President Herman B Wells — whom Peter greatly admired — had lived there. And in the 1940s, Wells entertained the cast of the Metropolitan Opera at Woodburn House when they came to perform *Aida* in the IU Auditorium. For Jacobi — and for the many IU music and journalism faculty, friends and family honoring him—it was almost as if the voices of Wells and the Met performers still lingered.

For sure, Jacobi would linger at IU. He continued to write reviews and columns for 20 years and taught arts reporting classes for another decade and a half. In 2009 he taught a graduate class in which Jenny Porter Tilley was a student. She remembers Jacobi as an inspiring mentor who taught her how to put “joy” into her writing. Her assignments usually got A’s but were “bleeding with red marks” and suggestions about making them better. Later, after getting a master’s degree, she became arts editor at *The Herald-Times* with the honor of editing her former professor’s articles. Although still “feeling like his student,” Tilley said she did “obsessively” eliminate his Oxford commas.

The last Jacobi column, minus those “Oxford commas,” was on December 15, 2019, a preview of the Bloomington Chamber Singers’ annual sing-along of Handel’s “Messiah.” It had a significance that only Jacobi could have known. He had published several successful books but was proudest of his 1982 work published by St. Martin’s Press: *The Messiah Book: The Life and Times of G.F. Handel’s Greatest Hit*. It is still influential and consulted by conductors and performers of Handel’s masterpiece.

As the luncheon group left the restaurant that crisp, early-December day in 2019 after a now-treasured conversation with Peter Jacobi, none of us thought it would be our last. Playing loudly on the restaurant’s door-way sound system was Bloomington-born Bobby Helms’s country classic, “Jingle Bell Rock.” Jokingly, one of us said, “Peter, they’re playing that just for you!” Enjoying the tease, he smiled and said, “Yes, I’m sure.”

One of Peter’s favorite songs was “*Va pensiero*,” Giuseppe Verdi’s choral anthem imagining the voices of the Hebrews in captivity in his popular opera, *Nabucco*. On several important occasions, Jacobi quoted from its first verse, “Fly, my thoughts on wings of gold” —most notably in a eulogy to his wife, author, and journalist Hattie Ackley Jacobi Clark, who died a few months before Peter. She and Peter had worked together on *The Daily Northwestern* and

graduated from the Medill School the same year, 1952. And Peter might well have chosen ‘*Va pensiero*’ for his own epitaph. After all, the thousands of his columns and writings about the university community’s rich life of the performing arts are now preserved in the IU Archives, with Peter’s thoughts still “flying on golden wings.”

Peter Jacobi, no doubt, would say he should not be placed in the pantheon of IU legends Menahem Pressler, pianist, and Janos Starker, cellist, but he belongs. They, too, were refugees from the Nazis, who — like Jacobi —played a huge role in deepening the richness and reputation of Indiana University.

Cleve Wilhoit
Emeritus professor of journalism
Media School
Indiana University Bloomington

(With contributions from Trevor Brown, IU journalism emeritus dean; James Kelly, IU journalism director; and James Capshew, IU professor and historian of the university.)

Thank you.

APPLEGTE: Thank you, colleagues. May I ask all who are able to stand for a moment in our respect for Peter Jacobi.

Thank you.

AGENDA ITEM THREE: EXECUTIVE COMMITTEE BUSINESS

APPLEGATE: We now move to Executive Committee Business, and I will turn the floor over to Marietta Simpson, Faculty Council President.

SIMPSON: Good afternoon, everyone. I'd like to welcome everyone again to the 2021-2022 season of the BFC, especially our new members. The circulars for what the BFC accomplish last year were attached to the agenda. So, I'm not going to go over them now. Hopefully, you had an opportunity to review them before you've come to the meeting, something we'd like to encourage everyone to do for every meeting so that we won't take time to do that in the actual meetings.

The thing that I would like to say to everybody about last year is thank you. I don't know if we say that enough. But thank you for what you did to make last year possible and for what you're doing to make this year possible. We appreciate that we were able to still complete BFC business, that the university was able to keep going because of your efforts. So, thank you to each and every one of you, whether you were on the council or not, for what you did to make that possible.

I'd like to recognize the following people. So, the list is kind of long, so bear with me until we get to the end of it. But these were our committee chairs last year and if I butcher your last

name, please forgive me. Maria Bucur and Cheryl Hughes, they were the co-chairs of the Benefits Committee. The Budgetary Affairs, Dominic DiOrio and Prina Fichman. Rachael Cohen, who was Constitution and Rules. Barb Cherry and Paul Coats, the co-chairs of CREM. Frank Diaz and Sylvia Martinez were Diversity and Affirmative action—who changed their name. The Educational Policies, J. Duncan, and David Rutkowski. Faculty Affairs, Israel Herrera and Steve Sanders, co-chairs for that committee. International Affairs, Jose Luis Antinao and Lucia Guerra-Reyes. Libraries Committee, Ann Elsner and Iliana Stonebraker. The Long-Range Planning, Diane Hensel. We don't have to thank the Nominations person, which was me.

APPLEGATE: I'll thank you for you.

SIMPSON: Okay. Thanks. Research Affairs, Stacy Giroux and Jennifer Simms. Student Affairs, Cate Reck and Paul Sokol. TPC, Sameer Patil and Angie Raymond.

Thank you to all of you who served as our co-chairs for last year. I also want to say thank you to our Executive Committee last year, who did an incredible job. And of course, we were all on Zoom last year and so none of those people got to sit in the seats that we are all sitting in. And so that our secretary last year who did an amazing job keeping us all entertained with these incredible secretary reports, were Colin Johnson, our parliamentarian Rachael Cohen, our past president Diane Haenszel, and our president John Walbridge.

I'd like to introduce you to our executive committee for this year. Two of our members are not able to be with us today, I believe, and that is Scott Libson and Brian Gill. Rachael is again our parliamentarian. Kelly Eskew, thank you Kelly. And John Walbridge is our past president. Rebecca Spang is our secretary. Cate Reck is our president elect. And as John told you, yes, President. Did I say Steve Sanders? No, I did not. But Steve Sanders is also on our Executive Committee. So that is our Executive Committee for this year.

Please if you have concerns or questions, contact the BFC Office. Elizabeth Pear is the head of the BFC Council Office. We are hopeful that we can have a very productive year, even in the midst of everything that is happening around us. Thank you again to all of you for what you bring to this council we're looking forward to all the work that will be done in our committees.

To end my report, I'd like to recognize two very special people who are celebrating their birthdays today. Yes. That is our president elect, Cate Reck and the head of our Bloomington Faculty Council Office, Elizabeth Pear, who celebrated her birthday yesterday.

And just so you know, it wouldn't be me unless a gift bag was involved. So, they will be presented with their gift bags. And just so you know that little gift bag on the table is for each of you, it cannot pay you for what you're going to endure this year and what you will serve and how you will serve, but it's just something to say, we appreciate what you do. We know that service is above and beyond what you're required to do. But we really do appreciate the time and effort you put into your time here on the BFC Council. Thank you.

APPLEGATE: Thank you. Were you going to present them?

SIMPSON: No, it's not that big of a deal.

APPLEGATE: They're birthdays. It's a huge, big deal. Well, I'm happy birthday to you both and anyone else whose birthday has somehow escaped mine or Marietta's attention.

AGENDA ITEM FOUR: PRESIDING OFFICER'S REPORT

APPLEGATE: First of all, I really want to echo as strongly as possible Mariette's remarks about thanking the Bloomington faculty, your perseverance, resilience, creativity, dedication to your disciplines and your students was, I've used the word awesome before and I'm not ashamed to use it again. It really is a remarkable testament to the character of the individuals of the Bloomington faculty and to the Bloomington faculty as an institution and as a group. So, I am very, very grateful for that.

I want to add a thank you to John Walbridge as the past president of the Bloomington faculty, a welcome to Cate Reck as the president elect. And congratulations to Marietta Simpson, who is to quote Cate, "the real deal president." And we know she is and so many other ways as well.

I'm very excited to be serving as Interim Provost and very grateful for the opportunity to serve this truly great institution. As you know, it is my home campus. It is a great research university. It is the flagship of Indiana University. Half of the entire university by almost any measure. It's the flagship of Indiana too. It is a public university. We are a public university, and we serve the greater good of the state of Indiana by pursuing excellence and by providing an affordable and accessible education to Hoosiers from all backgrounds, as well as people from around the nation and around the world. We are a diverse, an open community. And we just, we strive always to be that and to build on that. It is a community filled with rewards and also challenges. But most of all, what we do here, to create opportunities to advance understanding of the world around us and of ourselves is absolutely and critically important. Never more so than now. And so, the opportunity to be associated with and to serve an institution like this is something to be treasured.

I'm also thrilled to be working with the Bloomington Faculty Council. It's wonderful to look around the room and see so many friends and colleagues, and many of very long standing at this point here in the room and of course, around campus. I've said to many people that shared governance is part of the DNA of Indiana University Bloomington and I think of Indiana University generally, but certainly of this campus. And so, the opportunity in this setting and others to pursue that vision of shared governance is another thing to be treasured. So far, I have been meeting quite regularly with the presidential team of the Bloomington Faculty Council and with the Executive Committee. And I will say that those meetings have been both very candid and very productive. I think we've established some excellent lines of communication and I trust that that will be the way we continue.

I want to give a couple of updates. First of all, we welcome this year 258 new faculty members from 40 countries. 53 of them are tenured or tenure-track faculty and librarians. 37 are lecturers and clinical faculty. And 106 are researchers, that is research scientists, research associates, postdocs, and those similar roles. 62 are visiting faculty. The new cohort is 46% men and 54%

women. And 40% of the new cohort are faculty of color. I also want to share the good news on newly promoted and tenured faculty as of July 1. We have 47 newly tenured faculty, 43 new full professors. 12 faculty were promoted within the clinical ranks, 12 promoted within the research ranks, and 20 new teaching professors, which is a wonderful testament to the work that was done on that rank over, over several years.

I want to say a couple of words about enrollment as well, student enrollment. As you've undoubtedly heard, we had a record enrollment for beginners at IU Bloomington. Just missed the 9,500 mark. We had 9,482 beginners. We have 11,075 graduate students. And so, the total number of students enrolled at IU Bloomington in degree seeking programs is 45,328. These are the total enrollment and the beginner enrollment and are records for this campus. We have a very academically strong beginner class. They're median high-school GPA is 3.85, which is the second highest on record as you are very aware, having approved it, We use the test optional flexibility that this body in the BFC gave us very much during the pandemic. Our financial support, especially for beginning Indiana students, has never been higher. And we've also made great efforts to support our second-year students. Again, this is something I'm sure you have all observed and read about, but we have, in a sense, two freshmen classes this year. And our sophomores are beginning to adjust to the full kind of in-person campus life that they missed last year. And finally, I want to say that we're looking very carefully at the enrollment pipeline and making plans to assure that that is that as strong as possible for the upcoming years.

Next, I'd like to update you on some new leadership positions, not new positions. Well, one new position. The first Jeff Zaleski, I think I saw him. Jeff Zaleski has accepted the position of Vice Provost for Research. He served in the interim role, and I'm delighted that he is now in the permanent role. Lem Watson is serving as the acting Vice Provost for Diversity and Inclusion for this campus. He is filling in this year for John Nieto-Phillips, who is on sabbatical. Kirk White, who I think many of you know has been serving the university and this campus very ably as our primary liaison to the city and county as well as to other institutions in the area. But in particular, our relationship with Monroe County and the city of Bloomington has never been stronger. And that is very much thanks to Kirk's excellent work. That relationship has served the campus extraordinarily well over the course of the pandemic. And so, I'm very grateful for that work. And Sarah Booher, who's hiding the back there, has taken on the role of chief of staff in the Provost Office.

I'd also like to recognize, I'm not sure if she's here, but Bavika Khamesra, who is a senior honors student at the Kelly School, is the very first Jane Jorgensen Diversity Equity and Inclusion Fellow. And she will be working in the Provost's Office this year. That is a wonderful initiative of sponsored by Jane Jorgensen. There she will be the first of many to come, I hope. And I'm delighted that she will be in the Provost's Office.

I should also announce that there are a number of ongoing searches. There is a search as you would all know for the provost position and their searches ongoing for the deans of the Jacobs School. Jeremy Allen is serving as the interim dean. Austin Parrish is chairing that search. There is a search for the Luddy school, dean of the Luddy school. Dennis Groth is the Interim Dean and Rick Van Kooten is chairing that search. The Media School is searching for a dean, Walter Gantz, serving as interim in at that school. And Peg Faimon is chairing that search. The libraries

are searching for a dean and Diane Dallis-Comentale is serving as interim, and Eliza Pavalko is chairing that search. We completed a search last or well, couple of months ago for the IU Cinema and recruited Alicia Kozma to Bloomington. She will be arriving in October at some point and we're very much looking forward to the new heights that she will take the cinema. And I want to especially thank Greg Waller and the search committee for bringing that to a successful conclusion.

And the final matter along those lines is there are, as the Executive Committee reminded me the other day, there are a number of reviews of deans and vice provost that are in arrears and need to be attended to. There was a bit of a backlog before COVID and COVID did not help that. And so, as I told them, I am in the process of getting my arms around exactly what's needed when and we'll probably have to do some triage and we'll discuss with the Executive Committee just how we want to proceed to get those done in a reasonably orderly and expeditious way along with all of those other positions that were searching for.

A final update, I've put off talking about COVID as long as I possibly could, because it's usually the first subject that takes up all the oxygen in the room. But what can you do? Again, I want to thank the BFC Executive Committee for sponsoring the Town Hall webinar on Friday where I got to tag team with Dr. Aaron Carroll. Lots of great questions and I really appreciated it. The opportunity to do that. As I said at the time, thanks to the delta variant and the unfortunate to say the least, politicization of something as basic as vaccination. This is a frustrating and confusing time for many of us, maybe for all of us. I fully understand and share that frustration and sometimes confusion. And I think that everybody and I want to assure you that everybody who's involved in IU's response to COVID understands that as well, nobody thinks that COVID is over and done with us. It remains a very, very serious public health matter. And the caution that people are taking about it is very well-taken. I want to repeat too, that our top priority, the university's top priority, is keeping members of the IU community safe. We're always evaluating the evidence from the state, from the community and campus. And we're always reassessing our safety measures in those by reference to the new evidence that is available.

One of the specific issues that I don't recall actually coming up in the webinar but has been something that I know a number of people are very concerned about and rightly so, which is the impact on of the need for caregiving. People who have, most notably have children in public schools and possibly ones who are young children. This is a real concern. And what I want to say is that our, our approach to this, as in all matters like this, is to be as flexible as possible. I would hope that is our normal attitude as a university. But certainly, that's the case now. Unless there is some immediate or some major change, we plan to continue to handle that on an individual basis. There is some confusion I know about whether short-term absences for that kind of purpose fall within our remote work policy. And so, require a fairly elaborate set of arrangements. It does not. Those kinds of caregiving short-term needs that I know people will have should be handled with the chairs or deans or whoever the appropriate person you would normally work with. The Vice Provost for Faculty and Academic Affairs, Eliza's office has, I think it's on your website, a link to a service that can be accessed by employees of IU called Care.com, which allows for emergency short-term care opportunities.

And finally, I'm happy to report that the questions come up quite a bit about having family members tested. Doing it through IU is something that seems what would be wonderful to be able to do. We looked at it quite carefully and it really is not feasible. But fortunately, as of today, the county has arranged for the state to have a testing facility that available to anyone. So, for example, for parents who need to have a negative test for their children, it is open Tuesday to Saturday from 8am-4pm. It's located at 500 North Profile Parkway, which is on the west side of town. It's a drive-thru facility and it has the PCR tests. Results will be available by 5:00pm the next day. So, I think that's a wonderful resource. And I hope that people who need it will be able to take advantage of it.

So that is all of my report.

AGENDA ITEM FIVE: QUESTION/COMMENT PERIOD

APPLEGATE: And I think the next item will be the question comment period. So, faculty who are members of the BFC can address questions to me or Marietta at this point. And I don't know if we have any comments or questions that have been submitted in advance.

We do not.

So, it's a bit of a distance from here to there. So, if you and I can read some of the names and some of them are a little fuzzy. So, you might identify yourself as you ask questions that would help me very much.

Oh, okay. Yes. Yes, exactly. Israel. Him I know.

HERRERA: Thank you. John and welcome to BFC. Good to see you again.

APPLEGATE: Thank you.

HERRERA: I have a question or actually two questions regarding the members of the council. I could see that there is no professor of practice. So, I wondered if this seat will be fulfilled during the year? And also, with the faculty mediation, one lecturer, who was here left the university and based on the D-22 laws, there should be seven people. And I don't know if that lecture position would be also replaced in fall or in the spring.

APPLEGATE: I'm not sure whether the on the professor of practice question. I don't know if that requires a change in our rules, but fortunately, Elizabeth is here to answer all of your questions.

PEAR: I try. There is a vacancy in the Professor of Practice seat. We have tried to fill that vacancy. I actually emailed all the professors of practice on campus to see if we had any volunteers. And I received no interest. We can keep trying. But that is where we're at with that. I didn't quite catch all of your question about D-22

HERRERA: It's about one member in the Faculty Mediation Committee, so that lecture left the university and there is an opening. I think that there should be seven. And my question is if that lecture position is going to be replaced by someone in the same ranking?

PEAR: I will need to see. We do have a pool of alternative. I believe the policy or at least the practice has been to go to the next person who was the runner up since those are elected positions, I will need to look into that. I don't have an answer right now.

HERRERA: If I may?

APPLEGATE: You're on a roll. Go ahead.

HERRERA: I don't know. Yeah, so the other question is regarding the standing committees. I could see where we have the PDF, we have the members in the, on the agenda. But if someone else opened up the committees on the website for faculty affairs and for international affairs it would show up just the Executive Committee. So.

PEAR: Thank you. We are still working on updates to the website. There will be quirks here and there. When I have a chance, we will go through it in more detail to get those links sorted out. But thank you.

HERRERA: And John, I have a last question.

APPLEGATE: Sure.

HERRERA: It's regarding Kirk White. So he will be, based on the on the release, the new representative for the Provost's Office with the city and the county. So, I wonder if he would be just the contact between the provost, and the city and the county or faculty issues could be address and could be sent to him in defending any position regarding faculty on campus with the city and the county?

APPLEGATE: Well, certainly if there are issues that that you'd like to raise with the city or county. I think probably the most effective thing would be to be in touch with me and I will work with him to do that. I mean, I will say for example, he was very helpful in working with the with the county to setup the testing center after we'd looked at it and then looked at its feasibility for us. And then we approach that the county and the need for that really came from faculty and staff. And so, we're very pleased to be able to have a have a channel of communication. Others?

Yes. Colin?

JOHNSON: Thank you. I just wanted to take a moment to thank you for keeping the issue of caregiving on the table and attending to it as sort of from the very beginning, publicly this year. And I guess I just wanted to ask, I think one of the things that we learned last year was that kind of emergency conditions actually reveal broader problems that are kind of long standing and systemic.

So, I just wanted to ask whether under kinda of your leadership during your time as interim provost or sort of direct our question to the Executive Committee or Eliza who thought she was going to escape. But will be dragged into this right out of the gate. Whether that conversation is going to be continuing throughout the year, not only with respect to childcare issues, which I think are paramount in the minds of many people. But this sort of broader diagnosis that was offered last year by faculty were organizing around what they characterized as a crisis in care of that I think a lot of people sort of became newly aware of under emergency circumstances, but which then allowed them to kind of begin to draw a bigger picture in their mind about the forms of support that they feel they don't necessarily have that are interfering with their ability to execute their professional responsibilities.

APPLEGATE: Well, two reactions. One is not particularly pertinent, but just to agree with you very strongly that the pandemic revealed and, in some ways exaggerated many issues of all kinds. And so, I think your point in general is very good. I know that caregiving is something that's occupied a lot of Eliza's thought and time over a long period of time. It certainly, it is very important, I think it also relates to the more general question of, I guess the future of work is the way it's often put, which applies well across the board. Eliza, I don't know if there's a you want to comment further on that, but the short answer to your question is, yes, I think it is an important thing and something that we need to consider on in, holistically.

PAVALKO: Yeah, and I always love to get a chance to talk about the importance of care and care work. One of the things I know is that Fred Cate had a committee that the faculty committee that was working on, I believe a survey. I don't actually know when information from that's going to come out, but I think part of the goal of that committee was to first come up with some short-term kind of emergency things which I think primarily the funding, the small amounts of funding for faculty. But I think that committee is also kind of systematically thinking about what the broader needs are, particularly in terms of faculty being able to do their work. So, I like you, I really look forward to hearing what they come up with as well.

APPLEGATE: Thank you.

Others?

AGENDA ITEM SIX: INTRODUCTION TO THE BLOOMINGTON CHAPTER OF THE AMERICAN ASSOCIATION OF UNIVERSITY PROFESSORS

APPLEGATE: All right. Then we will go on to our next agenda item, which is the introduction to the Bloomington chapter of the AAUP. Ben Robinson and Israel Herrera. Gentlemen, please.

HERRERA: Thank you, John. Thank you, Mariette, and the Executive Committee for allowing us present and introduce our chapter. AAUP, American Association of University Professors, a chapter at Indiana University Bloomington. My name is Israel Herrera. I'm a lecturer representative and I'm also part of the Executive Committee for AAUP Bloomington. And I should mention that there are former BFC presidents, former BFC representative, and current BFC representatives are part of this group. And it's a pleasure and honor to introduce the president, Benjamin Robinson, who is going to talk about ways to join the chapter and also

events that we're planning for fall and I believe also for spring. Ben Robinson is a professor and the chair of the Germanic Studies Department.

ROBINSON: Thank you Israel and thank you to the BFC. I'm always worried, I lecture everyday with this mask, but I still, at first wonder, are you actually projecting your voice? But actually, let me even do this demonstratively so you remember to take them. I'm going to pass around fliers in two directions. And that also lists the, I think I'll hold onto them because I'm going to just read the names because Israel mentioned. Our Executive Committee is Elizabeth Housworth is our secretary treasure. John Carini is on the Executive Committee. Gareth Evans, Israel, Moira Marsh, Joe Varga, and Carl Weinberg. And you'll probably recognize many of those names from service on the faculty council.

I just wanted to, as Israel said, I mean, maybe this flier takes care of it. My students always ask me, why don't I have QR codes up and I'm working on it. I don't have a QR code on that. But you can find it very easily on our website, the national AAUP website. And to join the AAUP, it is a matter of going to the national website, joining as a national member, then indicating that your campus is IU Bloomington. So, we don't have a separate way for you to join the local AAUP. We don't collect local dues separately. We receive a share from the national dues. That said, yeah, please please look at the flyer or go to the national AAUP. And if you're interested in joining, and that's where you can do it.

But to awaken you're interested in joining, let me just tell you briefly something about the organization though. Us all taking initiative and serving, and faculty serve as I'm sure you know about the AAUP. But it bears repeating that it was founded in 1915, so a little over a 100 years ago, and it's actually been on the IUB campus since 1916. So, we've had a long tradition on this campus which has included as members of any faculty and also provost. So yeah, it's a wide opening and welcoming and inclusive organization. As an organization, the AAUP champions faculty interests in defining professional values and realizing best practices for higher education, including those that follow from our core principles of shared governance, academic freedom, tenure, and fair labor practices. And I put a stack of AAUP red books where you picked up your name tag. So, you can take that. It's not the complete AAUP Red Book, which is a big thick document, but it is a reprint of three or four major AAUP statements which show our principles but also indicate how the AAUP has really given shape to higher education in America.

The focus here on our campus has included advocacy work of our committee A, on behalf of due process, workshops on the RCM system. I know people always have perennial questions on what RCM is, how it works, or how it doesn't work. We've had film screenings. We weigh in with statements on behalf of, for example, due process for former faculty, NTT contracts and academic freedom on behalf of the independence of student media and other such issues. We bring guests to campus. So, in the last few years, we've brought Hans-Joerg Tiede from the AAUP itself. Nico Perrino from FIRE, which is the Foundation for Individual Rights and Education. Michael Bayrupai, an activists at the University of Pennsylvania and Adolph Reed, a political science from Penn State. Adolph Reed is from University of Pennsylvania. And upcoming this year we're discussing the possibility of bringing, Davarian Baldwin, he's very involved. Some of you might have heard about him. He's been a sort of electrifying figure. He's

the author of *In the Shadow of the Ivory Tower: How Universities Are Plundering Our Cities* about how university endowments have become big business. So obviously not only RCM, but endowments or something, it really behooves us as faculty participating and shared government and to understand how they operate.

And then currently our priorities are to secure the role of faculty voices and transparency in the selection of the new provost and to support our graduate student workers who continue to strive for funding commensurate with the responsibilities on the Bloomington campus. And part of that is really as faculty to normalize unionization, which is of course, IU has agreements of cooperation between employees' organizations, and the administration. And so, it's something normal. We have organizations, unions on campus, The Communication Workers of America and AFSCME. I know there's in the theater department, a universe union representing professional stagehands. So, this is a normal practice and I hope the faculty and VP wants to work on behalf of really normalizing the process of recognizing collective bargaining. We also hope to promote the continued strength of the liberal arts and sciences, especially against the encroachment of corporate structures of value in governance while represented the interests of faculty on all units. We want to defend the freedom of faculty, whether tenure, tenure track and non-tenure track with regard to research, teaching, and extramural speech while also promoting fundamental principles of equity and diversity on campus. And finally, want to advocate for a strong instructional budget. And this really thinking of Pamela Whitten's statements that students are at the center of our universe, and we feel an instructional budget really speaks to that centrality of students. And we want a budget that equitably funds faculty and graduate instructors, as well as academic advisors and support staff in order to put our students first by providing them with the best education available.

So those are the missions of the AAUP nationally, the tradition, but also here on campus. And we want this year, especially to try and grow our membership. This part of a national initiative of the AAUP. And really, I know a lot of us when we read Paul Krugman or we read *The New York Times*, we realized the importance of collective bargaining or of advocacy unions. And sometimes we don't think we have those opportunities in our very own backyard. It's really terrific if we step up and join those organizations to make them strong, to represent a strong voice of faculty on campus, and also to advocate for some of the issues we've been advocating for and hope to advocate for going forward. So again, thank you so much for having me here and to listening. And please take a flyer or take a red book and join the AAUP. Thank you.

APPLEGATE: Ben and Israel, thank you very much.

AGENDA ITEM SEVEN: UPDATE FROM IU HUMAN RESOURCES

APPLEGATE: Our next agenda item is an update from IU Human Resources, and we have a panel of Nancy Nelson, Jim Sherman, Christan Royer, and Sue Dukeman. I will leave it to you to figure out how to organize that.

SHERMAN: Thank you, John. Nancy Nelson is off in California meeting for the first time her new grandchild, so she will not be joining us.

APPLEGATE: We will definitely give her a pass on that one.

SHERMAN: Also, I think as many of you now, in July, the Director of Human Resources moved on to Yale. I guess they knew a great director of human resources when they saw one and it was there gain and our loss. But we're in the process of seeking a new director. And in the meantime, Lara Kress, who I believe is sitting there. Lara has been with HR for a number of years, and she will serve as the Interim Director of HR. And she's been doing a great job since July. And I'm sure she and everyone else has hopes that we get a full-time director. Very soon.

Today's presentation will be done by Christan Royer and Sue Dukeman. And let me say a little about each of them. Christan is the Director of Benefits for Human Resources. And those benefits involve your health benefits and retirement benefits. And I could say a million great things about Christan, but there's not enough time. But one thing I will mention is that Christan has been for the last, I don't know, 2-3 years, present at every single Benefits Committee meeting. She presents what's new in human resources with regard to benefits. She asked questions of the committee. She seeks input from the committee, and she uses that input from the committee to make decisions about our benefits. So, you know I've been on the Benefits Committee for 30 years or so. And this is new. This is really new and it's a great relationship we now have between the Benefits Committee and you and therefore, the Benefits Committee benefits from the meetings, the faculty council benefits from those meetings, and the faculty as a whole benefits from those meetings. So, during the presentation, Christan will focus on health benefits. And then Sue Dukeman, is the retirement expert in human resources. She knows anything and everything about retirement. If any of you are reaching the age where you're beginning to think about retirement. I'm not particularly looking at anyone, you may be aware of the series called Road to Retirement, which has been going on now for over a year and it's a wonderful series. Sue will tell you about it and she has been instrumental in developing that series of presentations.

So, take advantage of it and please talk to your colleagues about it. It's not an easy process. But working with Sue and with other people and human resources will make it a lot easier. So let me just turn this over to Christen.

ROYER: Great. Thank you, Jim. Let's see if I can. Great. As Jim mentioned, we've been working really closely with the Benefits Committee for several years now and really appreciate their partnership input. I can't say enough about of the members of the committee asking really great questions and giving us really great feedback. The committee asked us to focus on providing update today on what's coming for health care in 2022 for open enrollment. What are the things we're working on? What is the feedback we've heard from faculty and staff, as well as where are we at with retirement? And as Jim mentioned a little bit about our upcoming, it's actually ongoing retirement planning series that we've had just really outstanding numbers of faculty and staff attend to learn more about retirement. I think the more people hear about it, the more people attend, and it really helps provide that much easier transition to retirement.

So, a little bit about our health care plans before we get into what's new for the coming year, we have just over 19,000 employees that are eligible for benefits, those are just our active employees. That doesn't include some of the other plans that we provide health care coverage

for, including our graduate students that are SAAs and fellowship recipients, as well as some other professional programs for health sciences like our dental school and medical school students up in Indianapolis.

So, these are just active employees and of those, just over 17,500 are enrolled on our plan. So, a significant number of employees actually take our plan. And sometimes it's a little bit more than that. We have a lot of dually employed spouses that work at IU and sometimes, for example, my husband is a faculty member here at IU. We each take our own coverage, but we I have a colleague in our HR office. Her spouse takes the coverage, and she enrolls under him. So, it's probably actually a little bit higher than that number as well.

For the current fiscal year, our budget production for health care costs is \$283 million. So, the university is a self-funded health care plan, meaning every dollar you spend on health care, we pay. We do use Anthem and IU Health Plans to help manage our health care. In terms of paying claims, providing a provider network, providing medical criteria by-which the plan is governed. However, we basically pay them a flat fee every month to manage our health care. Any amount of health care that's used by employees, it's paid for by the university.

We're always looking at what our peers are doing. What are other universities doing? What are other large employers in the state of Indiana doing? And we're always looking at how our plans compare in terms of the benefits that are offered, what we're seeing in terms of projected trends and costs and those types of things. And for the current fiscal year, when we look across the market, when we look across other peer institutions, when we look at other large employers, Most are seeing costs increase in the range of 5-9%. The IU trend this year is below our peers, so we're at 3.5%. So that's, that's good news. We're trying to manage the plan really well while we're at the same time providing the benefits that all of our employees need.

So, when we look ahead for 2022, we don't really have any plan design, or benefit changes proposed for employees. We really understand that COVID has been difficult for everyone. We recognize that employees really value their benefits and are using them during this time period. And we don't want to make disruptive changes to that. So, we've left our plan design the same. There aren't any changes and deductibles, out-of-pocket, the HSA contribution, et cetera, those all stay the same. And then there's just a small premium increase this year of 3.5%. And I'll show you what that looks like on a second.

As usual, the university provides the HSA contribution to the HSA account as a lump sum in early January. This is really unheard of. Generally, most employers don't provide a lump sum amount. They definitely don't provide it up front at the beginning of the year. And it's typically not as large as what we provide. But we understand that our employees are using those funds and helping to offset the deductible. And we'd like to be able to provide that on that first paycheck in January, excuse me, the second paycheck in January.

So, while the benefits are staying the same, there are two key changes I want to make this group aware of. One is that everyone will get a new ID card this year. Whether you're an Anthem plan member or an IU Health Plan member, there are some federal changes regarding what has to be printed on the card that will be updated. As well as Anthem is issuing a new group number for our plan. And that means anytime you show your ID card beginning January or after, you have to

make sure you provide that new ID card that's mailed to you. If not, your claim will deny because they will have billed it under the old group number and error. Our office can help fix those types of things, but we're trying to get information out to faculty and staff to let them know that.

And then of course, we've historically had our tax saver benefit plan. And the industry standard naming for that plan is actually a flexible spending account or FSA. And all we are doing is realigning the naming of that plan to come into the industry standard alignment from TSB to FSA or flexible spending account. We often have financial advisors or task consultants calling our office saying, well, what is a TSB? And we have to say, oh, it's the exact same thing as an FSA, it's just our IU acronym for it. So again, just realigning to the industry standard.

In this slide just shows, again, nothing is changing for 2022, I highlight our two high deductible plans. 94% of our employees are on a high deductible plan. So, the deductible and out-of-pocket remain the same. And again, the IU contribution to the HSA also remains the same. As I mentioned earlier, the plans, the premiums will be increasing by about 3.5% this year. And this slide shows a little bit about how much of the university, the plan the university covers versus what the employee pays and then what the average total paid annual premium is. So, for example, for employees that make below \$35,000 a year, they pay approximately 5% of their annual premium, or about \$243 a year for their coverage. The university picks up the remaining 95%. And then addition, they get the contribution to their HSA account. And depending on the coverage level you select in the salary band you're in, might vary a little. These examples are based on our employee only coverage in our Anthem high-deductible plan. And that's because that is our highest plan of enrollment and the highest coverage level of enrollment. We also offer the tobacco-free affidavit. You have to resign that every year to take advantage of it. But over 80% of our employee population signs that tobacco affidavit every year.

In terms of what does this translate to an actual dollars? Going back to that example of an employee making less than \$35,000 in the Anthem high deductible plan for the employee only coverage level, that translates to an extra \$1.52 per month. So, this slide gives you a dollar figure to what that percentage means, dependent on which plan you're enrolled in and which coverage level.

We do still offer a PPO 500 plan. Again, I mentioned 94% or more of our employees are in the high deductible plan. Certain visiting scholars such as J1 visa holders and other types of visa holders that are here at IU, they have certain federal requirements for health care coverage, and they're not allowed to be in a high deductible plan. So, we continue to offer the Anthem PPO 500 plan. Although that does generally have lower enrollment because it's, it's really geared towards those individuals.

And so, looking forward, what are we working on besides open enrollment, which is coming this year, the last two weeks of October, as I noted, everyone has to receive a new ID card this year. And because of that, we're having to hold our open enrollment a little bit earlier so that we can make sure we get those ID cards out for everyone in time. But besides open enrollment, we're really focused on supporting employees, however we can with the benefits that we

have, we still are taking a lot of feedback from employees that they are coping with the strains of the pandemic. We are seeing really high usage of our employee assistance program, which is great. That means employees are seeking out help and using those benefits available to them. A lot of employers across the country are focusing on digital health resources. We're trying to provide more of those as well, just from a safety standpoint. And so, everyone can access benefits where they're at, when they need them. And really encouraging employees to do their preventive care and screenings. You know, it's a little bit more difficult to get an appointment during the time we're in with COVID. Sometimes screenings aren't always provided because they're focused on providing other types of care. But when you can get those screenings, it's very important. One of the ways that we encouraged employees to continue to get those cancer screenings was that we sent a postcard to home addresses over the summer. Actually, it was in May last year. Nearly 10 million cancer screenings were missed during the pandemic. And getting those preventive care screenings is really important for your ongoing health. So, we worked in partnership with Healthy IU, the Simon Cancer Center, and the Indiana Cancer Coalition to send some information out to employees to remind you to definitely get those screenings when you can. Additionally, Healthy IU is sponsoring several webinars that have been really highly attended on different types of cancer where they've brought in experts from the School of Medicine and from IU Health to talk about those different types of cancers screenings that are available and treatment options as well.

One of the long-term goals of Healthy IU is to create a cancer support network for IU employees who are either going through a cancer diagnosis and treatment or family members to help provide resources that would support them through that process. So that's something that we hope will be coming in the spring or near future. So, getting those screenings again, extremely important.

I mentioned early our employee support Assistance Program or our EAP, free confidential counseling from licensed clinicians 24/7, 365. They continue to expand the ways that they are reaching our employees. And I'm going to talk about a couple of different new treatment modalities in a second. But the data that we get back from the EAP, it's very high-level aggregate data. But the number one reason that employees from IU are calling them are related to anxiety, depression, and stress. And so, we're continuing to put together programs that address those issues. A lot of times when employees call the EAP, they can access the counseling sessions that are free and the resources that are free through the EAP. But sometimes they're also provided opportunities to access resources in the community. So, we work closely with our EAP, where they're resolving 98% of the cases just by using their counselors. But if not, if community resources are needed, our office is providing them information on different community resources and benefits that employees can access than they can help us get the employee to the right resource.

You probably all received an email from our office early September. And so, what we're doing in conjunction with HR, Healthy IU, and our work life programming is focusing on some of the topics that we're hearing about from employees. September was focused on managing anxiety and stress, both at home and at work. So, we have several live webinars available throughout the month. We put all of the information and the registration options in that email. We're also focusing our work life webinars on parenting. So, we've heard a lot of the challenges. We

continue to figure out ways that we can provide tools and resources to help parents. Some of the webinars, for example, in September were focused on teens specifically, that's a really big area where we're working with our EAP on. And then we're providing just static LinkedIn courses that employees can access anytime, wherever they're at, focused on well-being, managing anxiety. So that was the September topic that we really focused on. We sent out direct emails to employees, we're putting reminders in the *IU Today*. And we're putting those information resources out through our Healthy IU colleagues at each campus so that they can share those as well as wellness champions, which a lot of departments have identified a person in their department or their unit. They can communicate this information internally.

October, we're going to focus on dealing with trauma, grief, and loss. When you think about trauma, grief, and loss, it's not just always about losing a loved one. A lot of times it has to do with some of the things we've experienced through COVID, not being able to see a family member, not being able to get to do that annual event, you normally would do, that can trigger a lot of grief loss and trauma. So, in October, we'll be providing information to employees to address this topic. Self-care, coping with grief and then again, for the work-life webinars a lot of around parenting and how to deal with helping your children through that depression and loss process. I would note that the work-life webinar, sometimes we're inviting in some of our benefit vendors such as Care.com to provide those webinars. Sometimes we're tapping our IU faculty resources either in the School of Medicine or the School of Education. So, it's a mix of IU experts and some of our vendors that are, are providing those webinars. And again, some of those more courses that individuals can access anytime.

And then in November we're going to transition to talking a little bit more about gratitude, mindfulness, and motivation. And Healthy IU is going to do some midday mindfulness drop-ins and there is a lot of LinkedIn learning courses and online tools about just how to take where you're at and be grateful for that.

One of the things I mentioned earlier in terms of new modalities from our employee assistance vendor, they're launching a new CURE link for teens in November. So, this includes expanded programming for adolescence. They can access video counseling, texting, and coaching for teens. Dealing with mental health issues at the adolescent level was really difficult for a lot of teens during the pandemic. And because it's ongoing, they launch this new tool that's coming. And then one that we think that's going to be really exciting, that we've actually provided some feedback to them on is virtual support connect. So, during the pandemic, we had a lot of departments and units reach out to HR to ask if there was any virtual counseling available for groups, whether it be the entire department or maybe a team within a department, or a certain group of faculty within a department. And we just didn't have the resources. So, when we reached out to the vendor, they took our feedback seriously and are launching a new moderated group therapy session and it will be hosted by a licensed mental health counselor. They'll be able to cover a whole range of topics: preventing burnout, caregiver support, mindfulness, and sleep fitness. Sleep is very important to maintaining a healthy body and attitude when you talk about mental health. So, these are all coming, and we'll be providing more resources and information on that.

We're working really closely with Healthy IU to talk about workplace health and safety. There was a page that was launched to provide employees resources on returning to campus. And we continue to update that we're working with IU Studios, public safety, and others to add resources to that page. We continue to provide resources around parenting caregiving. There's a link from that page that provide some resources. And one of the things that we're going to be focusing on also in the coming months are more resources on suicide and crisis situations. Again, with that depression, anxiety, those mental health issues that keep coming up as feedback to our office. We want to provide resources to employees. One of the things that I think Healthy IU is really excited about also is our compassion culture. A whole series on compassion in the workplace. There's more information coming out about that, but that's launching this semester, as well as just thinking about taking care of yourself. There's a plant-based eating challenge available. And it's not about cutting anything out of your diet, but more about where can you add some healthy plant-based eating within your diet. So again, trying to address that. The issues around mental health, our Employee Assistance Program, the parenting caregiving, et cetera, where we can. So that's what's coming on the healthcare side for this semester and next semester. And I think hopefully these, these new programs coming out will be helpful.

One of the other things we wanted to mention were some retirement updates and I'm going to turn it over to Sue and in a moment. But one of the things that I'm really thankful for Jim and his expertise in is really helping with our retirement investment committee. As you all know, we went through a retirement transition a couple of years ago. Since we've completed that transition, we've heard a lot of positive feedback. We do have a Retirement Investment Committee. That committee is comprised of several faculty members from each campus. Jim serves on the committee. And then we also have several university administrators, our financial folks from treasury and the budget office, etc. But that group meets to make sure we're always providing retirement benefits that are useful to employees, managing our fun line up and Jim provides a lot of guidance and expertise in that area. And so, before I turn it over to Sue, we were always taking feedback and taking retirement topics and questions that come to that committee. So, I just wanted to make you aware of that.

DUKEMAN: Thank you, Christan. And just to go through some of the updates, there have been some recent enhancements to the retirement plans. IU offers two supplemental or voluntary plans to all employees, benefits eligible employees and recently the 457-B was changed where you can take in-service distributions once you reach the age of 59 and a half. We've always had that in the TDA, but recently we added the 457-B. And we did make that change during the transition in 2020 to also offer that after-tax Roth option.

So, before I came here today, I was on a webinar that Fidelity was leading and there was a lot of confusion about that one. So, if you have any questions, please reach out to us because we might be able to help us reach out to Fidelity. But we've heard that feedback. A lot of folks have asked for a lot of years if we would add the Roth option and it's in there. So, I need folks helping spread that news and make sure that people are aware that it is an option.

The other thing that was changed is if you've been here a while, you know that back-in-the-day we only had a percentage that you could contribute, so, each payroll and a lot of people said, I

just want to do a flat \$100 or \$1,000. We also changed that. So that's one of the changes that took place last year.

We also opened up that you can take other types of retirement plans and roll them into the TDA and the 457-B at Fidelity. Okay. And that's critical. So, it's only those accounts that you hold at Fidelity and the TDA 457. But I've worked other places and I have different retirement plans. I can take that now and roll that into that TDA and 457. If you have any questions about how that might impact your taxes or anything else, obviously, we would encourage you to talk to a tax advisor or our partners and the Fidelity-provided retirement counselors. So, we have a dedicated retirement planner at Fidelity. Many of you might know the name Caroline Mason. She was one of two dedicated planners with Fidelity and recently Caroline took a promotion and Fidelity is training her replacement right now. So, if you have any questions, you can certainly reach out to us in HR.

A lot of people think about, well, you know once retirement happens, what do those numbers look like? I heard this morning, on another call, that there are now more millennials in the workplace than there are those of us who are baby boomers. Okay. So, we have seen that trend at the university with retirements. You can see those numbers. And obviously our trends so far this year is to exceed the number of folks retiring compared to the last two years. Which brings us back to what was mentioned before, the Road to Retirement. That went to a virtual series. I think a lot more folks have been able to participate being virtual and just do an hour-and-a-half long sessions on a number of different topics. We are going to continue it that way into the foreseeable future. We bring in some experts on a few things like social security and Medicare. And then bring in other folks across the university to talk on those topics. So, I think our last two sessions are this week, Thursday and Friday for the fall series. And then I'll start planning and getting dates ready for the spring series. I will say that the majority of these sessions are attended by people that are getting ready to retire. And a lot of times my, for lack of better word, frustration is trying to engage employees and planning for retirement the day they start working at IU. And I don't know how many times I hear from people that will say, "oh wow, I went to that session. I learned so much. I wish I had known this ten years ago. I wish I would've known that." So, when I hear that from people, I say do me a favor, take that colleague under your wing, and have that conversation. IU offers such wonderful retirement benefits. But engaging our employees is one of the hardest things there is to do. My dream is to not only continue this road to retirement series, but it is to provide something along those lines for people of all ages so that they can better understand how to prepare for retirement. Obviously, my daughter grew up in my household and has it, but every so often she'll call me, "mom, I just got this email about my retirement plan, what should I do?" And I always have to take a few minutes. She got it though. Her first internship. She was able to participate in the 401K. And she did she's like, what should I do this? I'm like, yes, there's a match. Absolutely. She's like, but I'm not going to get to keep the match. So, what you put in money and for your future. Okay. So, anything you can do to help me reach our other younger colleagues, please.

Okay. You know how it is you get this email and people are like, why am I getting this? I don't plan to retire for another 15 years. There is no retirement age. It is a mindset. But there are some critical key dates that people need to be aware of whether or not they're going to retire at whatever age beginning at 65. People need to understand the pieces of Medicare, whether or not

you enroll in them. So, we are encouraging anyone that's going to be turning 65 to attend these sessions, specifically, the Medicare session, the social security session, and the HAS session. Because there are some key dates and things you need to be aware of even if you decide to work at IU until you're 82. Okay. There're still some key things you need to be aware of.

Jim also led a session on the psychology of retirement. And we got an incredible amount of positive feedback. Because a lot of times when we send those e-mails inviting people to these sessions, they're like, I am not ready. Are they trying to push me out? Are they trying to suggest that I retire? No. We're just trying to provide you information that you may need to know. Again, retirement is a mindset, and everybody has different goals on that. And they're going to be ready at different times. And Jim's session really kind of talked people through some of the things you need to think about to prepare yourself.

So again, there's several different sessions and we also partner with Fidelity to provide some more of the financial side of those things. Yes, this Friday is the phased retirement for faculty session. It is at 12 o'clock noon. We are going to have a guest join us that has been through the phased retirement plan. So, are there any questions from anyone regarding the benefits?

AGENDA ITEM EIGHT: QUESTION/COMMENTS ON THE UPDATE FROM IU HUMAN RESOURCES

APPLEGATE: Question over here, Nandini?

GUPTA: Thanks. Question for Christan. And then I had a quick follow up with Sue. Thanks for that presentation about these workplace wellness programs. I know you've spent a lot of time on them and so on, but do you have any evidence that they work. I mean, what is this sort of evidence-based policy that you have in place? Because the few studies I've seen, apparently, they're just not very effective. To name a couple of studies, there's one that came out in the quarterly *Journal of Economics*, maybe a couple of years ago. And it might not have been the specific type of wellness programs IU has but it mainly showed that there was selection in terms of the people who chose to join those programs. But they didn't really have an effect on medical outcomes or health outcomes subsequently. And of course, you know, these studies have their limitations. I'm not saying that they should be taken as the last word.

There was also a study in the *Journal of American Medical Association* that's just big randomized controlled trial study that showed that these workplace wellness programs again, did not really do anything. So, I was just curious whether this is just something that you personally have seen or help, your department has seen evidence that these things work or if there's more of a let's doesn't do any harm kind of argument to these.

Another question for Sue is that what percentage of faculty do not enroll in retirement programs? Like either faculty out there who are not enrolled in any retirement program? Thank you.

ROYER: Sure. Thank you for your question. That's actually a really great question and I think probably the distinguishing factor is that a lot of employers that offer full-scale workplace wellness programs are offering incentives or points or tying it to something else. Our programs

are more round. Feedback we're hearing from employees and ways to engage them to help make their overall work-life balance and better. They're all 100% voluntary. If you want to participate, you can. We offer challenges. And we're taking a lot of feedback and post-survey data from employees that have participated in those different types of programs to see how we can enhance it for the future. But unlike, I think what you're talking about in some of the different studies you mentioned, is that ours isn't a full-scale workplace wellness program. It really is just programming that we feel will enhance the overall work-life balance of employees and provide support and resources along the way.

We've not ever really discussed a full-scale workplace wellness program just because the feedback from what we've been providing through Healthy IU and some of our other vendors has been very positive. Also, those workplace wellness programs to implement them, track, do some of the measurement you mentioned is very expensive and would take quite a lot of budget.

So, I don't know if that helps answer your question, but that's just maybe the differential that our programs are just more voluntary enhancements for work-life balance and trying to provide tools, service, and resources that would be helpful to employees. And Sue. I don't know if you want to answer that question. I don't have data off the top of my head.

DUKEMAN: Yeah, I don't have the data. But, you know, faculty are enrolled in the IU retirement plan, where IU is making a contribution. I would have to look at the data to see how many faculty are then supplementing IU's by enrolling in one or both of the supplemental retirement plans. But we do come across folks that are putting in the IRS maximum in one of those supplemental plans and didn't understand that they can do the other one. There's two and you can do them both. I don't have the data. I mean, financial experts say if you put in somewhere around 12-15% of your salary throughout your working years. You will live the same type of lifestyle in retirement. IU does a very good chunk of that for folks. So sometimes I think there's a little bit of apathy of folks taking some initiative to save themselves.

And I'll add one thing, Sue, and that is an addition to the 10% that IU gives. Several years ago. I've been at IU for 16 years. I'd have to go back through my notes. I think it was around 2013 or 2014. We put in an automatic contribution in the system to our TDA of 5%. So, any new hire, whether it be a staff or faculty employee, you get the IU 10% contribution automatically and then we automatically put you in the 5% for the TDA. The TDA is voluntary. You can change that at any time you can increase or decrease it, set it to 0. But to Sue's point of typically 12-15% savings recommendation that was put into place several years ago. Now obviously, faculty who've been here for a longer weren't part of that process, but you can change your voluntary retirement at any point in time. We also expanded their retirement programs so that really anyone who's working at IU can save for retirement, whether that be a graduate student, who's an SAA or maybe even a student undergrad, hourly employee. If you're receiving a paycheck from IU, there is at least one plan that you can defer some contributions to your retirement account in as well. So, Sue did a presentation for the Graduate Student Organization in the spring about saving for retirement. She did an awesome job rolling out the Road to Retirement series and a short amount of time and to, you know, to her point in her dream of us reaching more younger employees. We started with the Graduate Student Organization, and we

would like to expand to reaching more new faculty and others as well. And sorry Jim, I think you were gonna say something.

SHERMAN: Just an answer to your question about a 100% of faculty enrolled in a voluntary retirement account. I'm sure the answer is probably not. I'm sure that probably not. Anyway, the one thing I always focus on when I'm talking to a group is that there ought to be a 100% of faculty who are enrolled in the HSA program. And I would say you ought to be enrolled to the maximum of what HSA contributions allow because it is the best retirement plan you will ever, ever have, no tax going in, no tax on earnings, no tax on coming out. If you do the maximum for 20 years, you will have a lot of money on your HSA account. And you can use it when you retire to pay your Medicare, to pay your supplement. There's nothing like it. So please take advantage and spread the word.

ROYER: Yeah, we do have quite a lot of faculty members that not only participate in both the supplemental retirement plans, but also max out their HSA as a whole financial strategy. And we talk about some of those things in the Road to Retirement and some of our other series as well.

APPLEGATE: David?

DALEKE: Thank you, Sue and Kristen, and especially thank you Jim, for your past services as president to the BFC, but also your longstanding service and the Benefits Committee. I have to say that as I get closer to retirement, I appreciate it even more. I have a couple of questions.

Thanks for mentioning the voluntary contribution that student academic appointees can make. Um, I think that's important, and I don't think it's well-known. And also, thanks for helping spread that information to the Graduate Student Government. Along those lines, I don't know if everyone is fully aware that graduate student, academic appointees, and fellows are also eligible for the support link EAP program. It's something that we discovered that there was a pretty, pretty big gap and knowledge about that during the pandemic and we did our best to spread the word on that. So, I think that that's really important.

But I have two questions for you. One is, are there going to be any changes to, excuse me, the health insurance plan for SAAs and fellows coming up with any future changes and upcoming changes? And especially in regards to continuous coverage that students have from year to year for students who are appointees that have contracts and for semester to semester? And also, whether or not there's going to be any changes having to do with a student that changes their type of appointment from say, fellow to SAA or back again? And then I have on follow up.

ROYER: Great. No problem. No, there are no changes this year for the health insurance coverage at all. The coverage remains very similar to employees, we didn't make any changes. We also didn't make any changes for the fellowship and the SAA. And then as they go back and forth, oftentimes from one academic year to the next, or sometimes from one semester to the next, they might switch their classification, if you will, and the coverage will be continuous.

DALEKE: I have one last question, and I'm not sure if it should go to you, but we have a plan for student academic appointees and fellows. And we send students who are not on those plans to the marketplace for insurance, but many other institutions and our peers have a Student Health Insurance Plan. Is there any discussion about reinstating, planning, one like that we used to have so that students who don't have that type of funding coverage can actually voluntarily enroll in health insurance?

ROYER: Yeah, that's a great question and it's one we get often. And there are a couple of different things that I can speak to, to answer that question. Some institutions have a mandate that all students at that institution are required to have health insurance. IU does not. And that decision is, is dependent and varies based on institution to institution. For example, University of Illinois, another Big Ten university. They do have a mandate. Their Health Center manages all of the health insurance and the enrollment for all students. IU doesn't have that. So probably, you recall years ago we used to offer a plan called the voluntary plan, and that was offered through the same vendor where we offered our SAA and fellowship coverage through, and students could take advantage of that plan. I don't know. We haven't talked about offering it. A part of the reason we don't offer it anymore, it was discontinued around 2015 when the ACA, the Affordable Care Act, came into play. And what happened was we saw from year to year-to-year declining enrollment. So, we ended up with only about 800 students in the plan because, so few needed it. And the reason was the affordable health care expanded coverage under employer plans for dependent children to age 26. So, most students were staying on their parent plan, or they were going to the marketplace and the marketplace coverage was much less expensive than the voluntary plan IU was offering. The premiums are based on the usage, and we only had 800 students who really needed health care coverage. And they were really using the health care coverage. And it was driving up the premium. So, we had to decrease enrollment, increasing premium. And it was cheaper for students to go to the marketplace. And for that reason, the plan was discontinued.

We've looked at other options. A lot of schools will offer a voluntary option, but they run into the same situation. It's something we can look at again but based on the analysis we've done over the years; it's still been cheaper and easier for them to go to the marketplace in terms of coverage in the marketplace has started to expand to be to have more open enrollment opportunities. So, I don't know if that answers your question, but that's a little bit of the history, the why, and the kind of analysis about where we are today.

DALEKE: Thank you.

APPLEGATE: Other questions? Yeah Steve.

SANDERS: I think this would be for Christan or perhaps for Laura. It's well documented that people who are not vaccinated for COVID are accounting for billions of dollars and preventable health care costs. We have the tobacco-free affidavit that recognizes that people who use tobacco cost the university, which is self-insured more in health care costs. Has the same approach been discussed for those who are not vaccinated for COVID? And if a decision has been made not to do that, what's the basis for doing it? If it makes sense for smokers, it seems to make at least as much sense for the unvaccinated for COVID?

ROYER: Yeah, absolutely. I can try to answer that. And Laura, feel free. I think there's a mic back there if you'd like to jump in. So, a couple of things. What we see across the industry, what different employers are doing is they're doing a surcharge, sort of like the tobacco affidavit. And then we've heard not other higher education institutions, but some employers that maybe offer a health plan, they may not cover the claims for someone who was unvaccinated.

We have not gone down either path at IU right now. And largely it's driven by the fact that our expenses related to COVID are not extremely high. 92% of our employees are vaccinated. It's an extremely high rate. I have people calling me from other institutions and other employers often weekly saying, "How did we do that?" Obviously, I can't take credit for it. But, you know, our financial challenges related to COVID are not very expensive. And if I go back to the slide that I had up earlier in the presentation, you can kind of see that in our health care trend, we're below the national average, which was 5-9% we're more at 3.5%. And that's because I think are very high vaccination rates have kept our costs down. So that's why we haven't gone that direction. So hopefully that answers your question. Yep.

APPLEGATE: Laura, please, if you'd like.

KRESS: I think Christian summed it up very well. And I don't really have a lot to add to that one. I mean, I think our vaccination rates really do reflect on the costs. And so, at this point, we have not had any serious conversations about taking action like that.

APPLEGATE: All right. Thank you. Other questions? Dan.

SACKS: Just a follow up on the HSA question. So can you clarify if I leave IU, what happens to my balances? My understanding is that they become subject to very high management fees. I don't know if that's true in Nyhart, but in general, what how does that play out? So, a couple of things.

ROYER: That's a great question. When you leave the university, the HSA account is like a bank account, so it's in your name. The deposits that have been made into the account contributions from IU plus year deposits. We cannot take that back. It's yours to keep and to take with you. When you leave the university, that account becomes yours. It's no longer cover the account fees are no longer covered by the university. Currently as of today, there's a \$2.75 monthly account fee that the university covers. So, when you leave the university, you do assume that \$2.75 per month account fee. Nyhart does have some options where if your balance is \$1,000 or greater, you can move that into certain investment funds. The university doesn't have any oversight of those investment funds. So, I can't quote the fees off the top of my head. But I can tell you the vast majority of funds that you could invest in for your HSA are Vanguard funds, the lineup is fairly similar to our IU retirement plan lineup. So, I don't know if that answers your question, but hopefully that helps.

SACKS: So just to clarify, there's a dollar fee but not like a percent of assets under management.

ROYER: Nope.

SACKS: Okay thank you.

ROYER: Sorry. Go ahead, Jim.

SHERMAN: Yeah, that's right. I would also add that once you leave IU, the HSA is yours. You can transfer to any other institution that has an HSA plan. For example, Fidelity has such a plan and they do not charge \$2.75 a month. Probably the local banks, some of them also would take HSA accounts and not charge you a monthly fee. So, I would suggest if you're retiring or leaving IU, that you just look to put it somewhere else.

ROYER: Thanks, Jen. That's a great follow-up.

APPLEGATE: Colin, and then let's make that the last question.

JOHNSON: So thank you very much for that presentation. I guess the question I have is, it's fairly straightforward one. I know you're thinking about policy at the university level. I assume you also pay attention to sort of the availability, for example, of service providers in different parts of the state. I was having a conversation with a junior colleague of mine recently, who was newly arrived to Indiana. And we very quickly identified the fact that in Bloomington specifically there are three things you cannot get: one of them is a place that a doggie day care place, the others a hair appointment, and the other is a primary care physician. I actually had to switch primary care physicians. I was told that I could make an appointment in six months to see them for screening. So, to what extent does the human resources monitor the kind of state of service providers for us to make use of IU's, I agree, very excellent benefits?

ROYER: Yeah, that's a great question. And I feel your frustration. Not only do I hear that from employees, but just for my own family. So unfortunately, in the Monroe County area, actually sort of Morgan County south IU Health has quite a lot of providers, but not enough to provide the overall primary care that's really needed in our communities. In Indianapolis north, it's a very different situation. You can get a primary care appointment in a matter of sometimes a couple of days or a couple of weeks. We are routinely talking with and working with IU Health. They are aware of the situation. They are working on other options within our community. They've expanded some of their walk-in clinic hours to try and cover things like maintenance medications, where maybe you need to have those renewed but you can't get into that primary care appointment, they'll do that for you at some of the walk-in clinics now. But we're routinely talking with them. And it's not just primary care. We see the same thing with other specialties, we're very concerned about our diabetic patients in Monroe County. There's one endocrinologist in town and a lot of our employees are going to Greenwood or Indianapolis, so we're aware of it. We make them aware of it. We're routinely meeting with them to make sure they understand that we have these concerns and we're hopeful that they will continue to hire new providers. I think they have added some new ones in town. One thing we are a little bit concerned about going back to our talking points about screenings earlier. They are also not only is it difficult to get into primary care, some of the screenings that you would normally do have been difficult to schedule or they've called to say they're canceling it because they don't have enough staff, or they've transition staff to cover COVID patients. So, it's something we continue to talk to them about. And we're hopeful that they will continue to add services, but

we are working on it as much as we can. And we are able, I've been able to make a few phone calls for employees that really needed to get into primary care. It was a situation they couldn't wait. So, if you do have a colleague that is extremely stressed about it, please let us know. I can't make promises, but we'll do what we can.

APPLEGATE: Well, thank you very much, Jim, Christan, and Sue for that report. Jim did you want to?

SHERMAN: Yeah, just a final word. I hope all of you recognize the competence and the caring that comes out of human resources benefits. If you hear from your colleagues' questions about, how come IU isn't doing more about health care or retirement benefits or communication. Please let them know that they're trying their best to do it. And if you've got suggestions about how HR can improve that communication, please let them know. These are just wonderful people with whom to work.

APPLEGATE: Jim. Thank you for that. And I think that the presentation certainly demonstrated what you were saying. So, thank you very much. Benefits are obviously a matter of great concern to everyone, and so we're very grateful for that very detailed report.

AGENDA ITEM NINE: REPORTS FROM THE FACULTY GRIEVANCE AND MISCONDUCT COMMITTEES

APPLEGATE: The next item was supposed to be reports from the faculty grievance and misconduct committees, but Barbara, I believe, is unable to be with us, so we will put that agenda item off until our next meeting. I know it will come as a great disappointment that we're ending 14 minutes early. But you will have to live with that. And I will see you all at the next meeting. We are adjourned.