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Faculty Council Personnel & Benefits Committee Meeting
1:00 to 3:00 PM, Friday, September 4th, 2026
Zoom Video Conference

Minutes

Attending: Sherry McCormick (Chair, UCCS), Jeffrey Schrader (UCD), Steven Blackwell (SYS), Diana White (UCD), Lindsey Yates (UCD), Jeffrey Zax (UCB), Katie Sullivan (UCCS), Monica Furey (UCCS), Chad Marturano (CU System), Usha Sharma (SYS), Michael Lightner (SYS), Gary Bomba (SYS), Melissa Marten (SYS)

1. Call to Order / Chair's Report (Sherry McCormick)

- May meeting minutes were approved with a minor amendment to add a note and correct the identification of the Vice Chair.
- Sherry reported that the summer was primarily focused on the Faculty Housing Assistance Program and introduced the discussion of next steps for expanding the program to IRC faculty.
- The committee discussed filling the vacant Anschutz faculty representative position. Leigh Ann reported that candidates were still awaiting approval through the appropriate Anschutz Faculty Assembly process.
- The committee discussed potential topics for the coming year, including family leave, disability, other benefits, and clarification of benefit information for faculty.

2. Faculty Housing Assistance Program

- Usha Sharma and Michael Lightner reviewed the proposed Housing Assistance Program for IRC faculty, including eligibility criteria, program structure, funding, and the process for managing the program as available funds approach capacity.
- The proposed IRC program would generally follow the existing FHAP structure, with Impact Development Fund administering the IRC program and Treasury continuing to administer the existing tenure-track and tenured faculty program.
- The committee discussed the 1.5% funding limit associated with Segment 3 of the Treasury pool. The current program was reported to be using approximately 35% of that available capacity, with the expectation that adding IRC faculty and higher assistance amounts could accelerate use of the reserve.
- The committee discussed how applications should be handled if available funding becomes limited. Jeffrey Schrader proposed a first-come, first-served approach across eligible full-time faculty and campuses, with the policy treated as a living document that could be reviewed as additional program data becomes available.
- The committee expressed support for the first-come, first-served approach. Chad Marturano indicated that the recommendation from Personnel & Benefits could be shared with other groups involved in the approval process.
- Jeffrey Schrader will draft a resolution for the committee. Chad and Usha will provide the prior regional resolution regarding the 1.5% funding limit for circulation to the committee.
- Members requested clearer inclusion criteria for IRC faculty, particularly distinctions among clinical teaching, clinical practice, and clinical track appointments, so faculty can better determine eligibility.

- Sherry discussed scheduling additional meetings on the housing assistance work. The committee considered meeting in mid-September or sooner and then moving to an every-two-week rhythm, with scheduling based on member availability.

3. CU System Benefits Update – Steven Blackwell

- Steven provided updates on Public Service Loan Forgiveness resources, the tuition assistance benefit, retirement plan changes, HSA enrollment, and upcoming Employee Services educational sessions.
- Steven reported that there was no new update on the tuition assistance benefit. Leadership continues to consider options, and additional information will be shared when available.
- Steven reviewed Secure 2.0 Section 603, including the requirement for certain employees making catch-up retirement contributions to make those contributions on a Roth basis. Employee Services is working toward an automated process for January 2027.
- PERA is transitioning administrative tasks for the 457 plan to participating employers beginning January 1, 2027. Steven expects the process to resemble the existing 401 plan process through the Employee Services portal.
- HSA open enrollment for 2027 will run October 12 through October 23, 2026. The individual contribution limit will increase to $4,500 and the family contribution limit to $9,000.
- Steven reviewed upcoming learning opportunities, including family leave sessions, CollegeInvest presentations, TIAA Annuity Basics, Social Security Basics, and a health savings account session.

4. Health Plan and International Coverage Discussion

- The committee discussed the lack of clear information regarding health insurance coverage during international personal and university-related travel.
- Steven clarified that Global Core primarily functions as a provider finder and general travel resource and does not provide comprehensive information about plan coverage. Professional travel is supported separately through ISOS.
- Members discussed the value of providing clearer information about coverage across the different health plans and improving access to written communication from Anthem and other plan administrators.
- Steven will ask whether the medical plans have contractual performance measures for customer service and response times similar to those used for retirement plans.
- The committee also discussed the continued question of why the Exclusive plan is offered given its overlap with the Pathway plan. Steven indicated that this question may need to be addressed with the CU Health Plan Trust and will raise it with Lisa Landis and Tony DeCrosta.
- Sherry raised the status of John McDowell, the retired faculty member serving on the Health Plan Trust, and the committee's difficulty obtaining a response from him. Steven will follow up with Lisa regarding his role and whether he can engage with the committee.

5. Employee Leave and Dental Benefits

- The committee discussed the lack of clarity surrounding family leave for faculty during the summer, including requirements related to summer contracts and how leave interacts with faculty appointments and funding.
- Taylor Landman was identified as the appropriate Employee Services contact to speak with the committee about family leave. Steven will coordinate with her based on the committee's preferred meeting month.
- Members discussed differences in how sick leave is tracked and understood for nine-month and twelve-month faculty. The committee identified a need for clearer information regarding the purpose and use of sick leave for nine-month faculty.

- The committee discussed the dental benefit and whether the current structure provides sufficient protection against high-cost dental expenses. Sherry will contact Tony DeCrosta regarding a simulated underwriting/cost analysis of the dental benefit.
- Members discussed whether the dental benefit could be structured differently to provide greater protection against catastrophic expenses, while noting that further financial analysis would be needed.

6. Campus Updates / New Business

- The committee discussed potential priorities and educational topics for the coming year, including family leave, disability, retirement benefits, health plan coverage, dental benefits, and other lesser-known benefits that faculty may not fully understand.
- Diana suggested developing concise one-page resources explaining lesser-known faculty benefits and their practical applications. The idea may be revisited as the committee identifies priority topics.
- Jeffrey Zax suggested inviting Tony Gherardini, Vice President and Chief Human Resources Officer, to share his priorities and the HR issues he considers most in need of attention. Sherry will follow up with Tony regarding his priorities and possible participation in a future meeting.
- The committee confirmed plans for an October meeting to be held in person with a virtual participation option.

7. Adjournment

Next meeting: October 2nd, 2026 at 1:00-3:00 PM, in person with a virtual option