Summary of Recommendations

Continue flex work as a permanent talent strategy

- Not the Norm
  - Must align with job function
  - Supports a residential campus student experience
  - Business rationale required

- Annual Review/Expanded guidelines at the University level
  - Annual review as part of performance review cycle
  - Additional questions in Work Arrangement application

- Local decision making and approval at Org/Division level for in-state

- Mitigate risk and expanded approval for domestic and international

- Space utilization guidelines

UI Health Care
Developed a separate initiative designed to meet the needs of a 24/7 patient care environment.

Corporate Shared Service Functions
- Information Technology (IT)
- Financial Services
- Patient Access Center
- Marketing and Communications
- Human Resources (HR)
- Compliance

Future of Work - Micro Unit Representatives

25% leadership position – stretch assignment
• Diana Kremzar, UHR in this role effective May 16, 2022

Micro Unit Representatives
• Heidi Zahner-Younts (Organizational Effectiveness, UHR)
• Terri Hein (Payroll, UHR)
• Sara Hoffman (Communications, UHR)
• Nichole Singer (Project Management, UHR)
• UI Health Care (regarding out of state work) – TBD
• Senior HR Leader - TBD

Unit responsible for:
• Work Arrangement Application
• Updated Supervisor Training
• Risk Mitigation Framework/Case Management for Remote/Outside Iowa
  • Ogletree, Deakins, Nash, Smoak & Stewart, P.C.
• Policy Updates
• Metrics, Evaluation and Reporting
## Initiatives

<table>
<thead>
<tr>
<th>Short Term</th>
<th>Long Term</th>
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<tr>
<td><strong>By End of April</strong></td>
<td><strong>2022-2027 Strategic Plan</strong></td>
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<tr>
<td>• Hire Micro Unit leader 25% position - COMPLETE</td>
<td>• Assess the potential impact of staff recruitment and retention of innovative workplace strategies such as flexible work (Still in draft)</td>
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<td>• Begin relationship with Ogletree - COMPLETE</td>
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<td><strong>Early May</strong></td>
<td>• Working@Iowa data analysis</td>
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<td>• Establish micro-unit - COMPLETE</td>
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<td>• Update work arrangement application</td>
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<td>• Update process and procedures</td>
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<td><strong>Mid to Late May</strong></td>
<td>• Annual performance evaluation process and analysis</td>
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<td>• Senior HR Leaders Training - process &amp; procedures</td>
<td>• Annual attestation process</td>
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<td>• Staff Council Meeting</td>
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<td>• Updated self-service application live (May 16th)</td>
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<td>• Comms to employees to complete new application</td>
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<tr>
<td><strong>Month of June</strong></td>
<td>• Leadership report – Summer 2023</td>
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<tr>
<td>• Initiation, review and approval of work arrangements</td>
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<td><strong>July 1</strong></td>
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<td>• Updated arrangements in the system</td>
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Work Arrangement Application – Planned Updates

- Additional questions added to application
  - NEW - Alignment with Guiding Principles
  - REVISED – Technology Questions

- Developing alert system

- Will require new application to be completed by July 1st
  - Align with University guidelines referenced in the report
  - Align with college and administrative unit practices (under development at ORG level)
  - Establish the on-going work arrangement (no longer a pilot)
Phased Retirement Pilot Program Expansion

PENDING BOARD OF REGENT APPROVAL AT JUNE MEETING

May 2022
Pilot Phased Retirement Program
For University of Iowa

Effective
June 3, 2022, through
June 30, 2025

 Extend maximum length to three (3) years

 Expand current optional “up to 10%” salary incentive to both year one and year two of a three-year agreement

Pending Board of Regent Approval
Pending Board of Regent Approval

What would Change?

Pending Program

Max of three (3) years

- Full retirement at end of phasing period
- If 3-year phasing period, employee’s year one (1) and year two (2) must be between 50-65% effort, and only 50% effort in the third (3rd) year
- For phasing periods of one-year or less, the appointment cannot exceed 50%.

Expansion of current optional “up to 10%” salary incentive

- Salary incentive available for year one AND year two if a three-year agreement.
- Salary incentive available for year one ONLY if a two-year agreement.
- Salary incentive NOT available if a one-year or less agreement.
What is NOT Changing

**Eligibility**
Regular faculty and staff in a 50% or greater regular appointment for 15 years,

AND attained age 57

**Benefits**

Insurance Benefits:
UI and employee contributions to health, dental, life, and disability remain at same levels as full-time appointment.

Retirement Benefits:
Employees contribution will reflect their working percentage for both TIAA & IPERS.
UI contributions to TIAA will be based on employee’s full-time salary. UI contributions to IPERS will reflect their working percentage.

Time Off Accruals:
Vacation and sick time accrual rate will reflect the working percentage during the phased period.

Pending Board of Regent Approval
Application and Approval Process

**Step 1:**
To be considered for the pilot, you must enter an approved phased retirement agreement between June 3, 2022, and June 30, 2025.

Employee & HR Rep fill out the Request to Participate in Phased Retirement form (pdf)

Form can be found on the Phased Retirement website: https://hr.uiowa.edu/benefits/retirement/phased-retirement-program

**Step 2:**
Obtain appropriate administrative officers' approval:

For staff:
- Departmental Executive Officer,
- Dean/Major Administrative Officer,

For faculty:
- Departmental Executive Officer
- College/Division Leadership

Completed form submitted to:
benefits@uiowa.edu

**Step 3:**
Benefits reviews request form and creates the official agreement.

Agreement is sent via DocuSign to:
- HR Rep
- Employee
- Departmental Executive Officer
- Dean/Major Administrator Officer
- Associate Provost (faculty only)
- Sr. Director, University Benefits

Once all e-signatures are applied to the agreement, DocuSign will send a pdf copy of the fully executed agreement.

Pending Board of Regent Approval