I. Call to Order

II. Approval of Minutes (Vote)
   • Minutes of the 2019-2020 Faculty Senate Meeting #21 (February 25, 2020) Attach. #1

III. Chair’s Report

IV. Provost’s Report

V. Committee Reports
   Library Affairs Committee (vote)
   - FSH 1565 Library items – Ling Ling Tsao Attach. #2

VI. Other Announcements and Communications
   - Ben Hunter (Library Dean) RE Library budget and resources and Marco Seiferle-Valencia (Open Education Librarian) RE OER’s Attach. #3

VII. Special Orders

VIII. New Business

IX. Adjournment

Attachments:
   • Attach. #1 Minutes of the 2019-2020 Faculty Senate Meeting #21 (February 25, 2020)
   • Attach. #2 FSH 1565
   • Attach. #3 Power Point Slides from Ben Hunter
Call to Order: Chair Grieb called the meeting to order at 3:33 pm.

Approval of Minutes (vote):
There was a motion (Dezzani/Fairley) to approve the minutes of the 2019-2020 Faculty Senate Meeting #21 (February 25, 2020). The motion to approve the minutes carried unanimously.

Consent Agenda: None.

Chair’s Report:

- Chair Grieb welcomed Alex Vakanski, professor of Industrial Technology in Idaho Falls, proxy for Mike McKellar.
- Sabbatical applications for the 2021-2022 academic year are due March 31st. Completed applications must be submitted to provost@uidaho.edu.
- Windows 10 operating system upgrades are in process. See below:

Windows 10 Operating System Upgrade Process Begins March 2
A Windows 10 Operating System major upgrade will be pushed to all managed Windows 10 computers starting on Monday, March 2, and will spread throughout the week with the final push happening on Wednesday, March 11. Computer users with a recent version of Windows 10 will be presented a choice to “Upgrade Tonight,” “Upgrade Now” or “Upgrade Later.” It is recommended to choose “Upgrade Tonight” as this upgrade will require several reboots of the computer. Leave computers plugged in and powered on but logged out. The upgrade will begin at 10 p.m. and can take several hours to complete. If a computer has an older, non-supported version of Windows 10, the only options are “Upgrade Tonight” or “Upgrade Now.” Major updates include new features, options and compatibility with other Microsoft applications such as Office 365. Contact Local Support/TSP with any issues with the upgrade.

- An update on the Infectious Disease Response Team and the Classroom Response Subgroup was given by Vice Provost Torrey Lawrence. The team met a few times, including today. There is no emergency at this time. Dean of Students Blaine Eckles chairs the IDRT has put together six subgroups who are working on different topics. These include 1) Care for Others, 2) Cleaning, 3) Classroom Response, 4) Campus Outbreak Response, 5) Communications, and 6) Travel. No comprehensive emergency plan will be shared at
this time, because it could lead to anxiety and panic. But it is important to know there are dedicated and highly trained people preparing for a variety of scenarios. Send any questions or suggestions you have about Classroom Response to Vice Provost Lawrence.

Discussion followed:
In response to a question about coordination with the City of Moscow, Vice Provost Lawrence said there was indeed coordination with the Idaho Public Health Regional Director as well as representatives from the City and the County. We are also in contact with WSU.

A Senator asked whether students are being advised to do anything differently than usual, such as staying away from the classroom should they feel safer doing so. At this time, Vice Provost Lawrence replied, the best advice is to follow the sanitation guidelines that have been distributed such as wash one’s hands frequently, cover your cough, etc. Employees and students are asked to stay home if they are sick. Other than that, it is “business as usual” for now.

To the question whether test kits were available from CDC, it was replied that testing is taking place in Moscow, although the timeline to obtain a result is not instant and may take up to 48 hours.

Provost’s Report:
• Deans have submitted budget plans February 20. Since then, there have been some more dialogue and a few last-minute changes. The good news is that Academic Affairs has met the targeted budget cuts. The Provost thanked everyone for their help, input, and constructive suggestions. Senate, Deans, and several other people were involved and engaged. Some difficult conversations are still to come, but we are getting close to the final plan to be implemented. Naturally, people want to see some level of detail. Probably next week, the plan will be shared and people will be able to ask any questions. Plans are on a college-by-college basis, unit-by-unit basis. Some plans may still be subjected to change. For instance, it can happen that some programs may stay, even though the deans had recommended them for closure. One more meeting of the APPT will take place.

Discussion:
A few Senators wished to have confirmation of the following: If a dean recommended a program for closure but APPT does not agree with that assessment, will the recommendation of APPT overwrite the dean’s budgetary recommendation? The Provost replied that APPT is the primary path for closure decisions, and it is consistent with shared governance. Program Prioritization is a form of program review, and the programs being reviewed are part of budget resetting. But we also need to talk about what policy says in case of program closure and be sure to avoid conflicts with Board’s policy. APPT is a clear path to program closures.

A Senator asked whether Senate will have the opportunity to review the closure decisions. Provost Wiencek reiterated that policy needs to be checked carefully. For sure, closure of programs requires the standard process through the University Curriculum Committee.

There were no more questions for the Provost.

Committee Reports: Library Affairs Committee (vote), FSH 1565 D-5, Ling-Ling Tsao.
The current language in policy requiring “an advanced degree in library science from a library school accredited by the American Library Association” is too restrictive. The flexibility that this revision would allow is necessary for a modern academic library.

There were no questions or comments for Ling-Ling Tsao. The seconded motion from Library Affairs passed unanimously.

Other Announcements and Communications: Library budget and resources, Ben Hunter (Dean of University Libraries), and OER, Marco Seiferle-Valencia (Open Education Librarian).

Marco Seiferle-Valencia started his presentation by giving a brief background about himself and his upbringing, which in part shaped his interest in affordable education material. He opened his remarks with the contemporary goals of better understanding open education resources (OER) and where we are in the discussion with SBOE. Marco Seiferle-Valencia went over the planned SBOE OER policy changes and the enormous impact it would have on students in terms of savings on textbooks. He said he hopes that an on-campus OER working group can be assembled. He then proceeded to elaborate on the advantages of open textbooks and the Library’s role in the outreach and promotion of Open Access. Hopefully, by the end of the year, we will have a Board policy that combines the best of OER with academic and intellectual freedom. His complete presentation can be found at https://tinyurl.com/UofIOER.

Discussion:
A Senator asked how the requirement to read a large number of copyrighted books (say, 10 or 20) as it is often the case in a major such as English, can be reconciled with cheaper textbooks alternatives. Marco Seiferle-Valencia suggested partnership with the Library to request that books be placed on reserve, or pursuing eLicences. He also said that books required for English courses can often be purchased at a quite modest price. This is usually the case for novels. The Senator noted that, although each required book may be relatively inexpensive, altogether they may add up to significant costs for the students. Marco Seiferle-Valencia recognized that this is an issue that must be addressed creatively. Other solutions may include packaging digital contents as a book replacement.

Following up on the previous comments, a Senator observed that, with the shift from books to articles, a dramatic change in education is unavoidable, and that such change may not necessarily be for the best. Marco Seiferle-Valencia acknowledged that this is indeed a challenge to keep in mind. He hopes for solutions that can achieve cheaper options without fundamentally changing the pedagogy.

In response to a concern about the use of OERs perhaps narrowing the canon available for literature classes, a Senator responded that most assigned reading for literature classes (with the exception of translated works) are acceptable in any edition and that it is thus pretty easy for students to find very affordable copies.

The focus moved onto the author’s point of view. A Senator noted that he writes his own textbooks and makes them freely available to the students. However, in order to receive proper professional credit, one must eventually go through a publisher. Indeed, Marco Seiferle-Valencia noted, faculty do a significant amount of digital work for which they do not receive credit towards professional evaluation or Promotion and Tenure. Clearly, faculty need formal recognition for their digital work. Chair Grieb noted that the consistent and uniform evaluation of this type of academic accomplishments is an important college-level issue. Furthermore, proper recognition of these scholarly achievements
(authorship of books, chapters, etc...) is in line with the recent changes in the Promotion and Tenure policies.

A Senator asked how the distribution of revenues on a $25 OpenStax book compared with the one showed during the presentation for a traditional $100 textbook. Marco thought this was a very interesting question and will follow up with more information.

**Dean of University Libraries Ben Hunter started his presentation, available as attachment #3.** Dean Hunter gave a library budget overview broken down by salaries, resources, and other items. Dean Ben Hunter addressed structural issues with the budget model and the challenges of budget reductions (17.5%). A detailed presentation of FY18-FY21 expenditures can be found in the attachment, along with a peer comparison. Dean Hunter noted that one of the Library’s goals is to take U of I closer to our peers.

Moving forward, Dean Hunter emphasized the importance of continuous communication with campus about subscription cancellations. Unfortunately, successful negotiations with Elsevier could not be achieved. The Library will try to provide people with as much support as they can. But they will have to move forward with a very different approach than in the past. Scholarly communication is changing. They plan to enhance library loan services, join the on-going transformations with open access, open-source software, digital collections, and OER. They are trying to be part of the solution rather than adding to the current problems.

**Discussion:**

The Senator representing graduate students was interested in how campus input is going to be collected. Dean Hunter noted that there will be opportunities to submit formal requests, in addition to normal library communication.

In response to a question from another Senator, Dean Hunter confirmed that Elsevier will no longer be available as a full package. They “unbundled the package” and will buy individual titles.

The focus moved to the possibility of regional library sharing. In fact, Dean Hunter confirmed, the Library provides these services for physical materials though their membership in the Orbis Cascade Alliance, a network of academic libraries in the northwest, as well as through traditional interlibrary loan services. Electronic sharing is much more complicated due to copyright and licensing issues, though there are potential interlibrary loan service upgrades that the library is investigating that could decrease delivery time. One of these services utilizes “regional nodes” to enhance interlibrary loan services.

The questions moved on to whether there are records of patrons’ library searches, particularly if they don’t find what they are looking for. Dean Hunter emphasized that privacy has a long tradition with libraries, thus no such information is collected. There are vendor-provided statistics, although it is not clear how reliable they are. When something is not found, it is best to communicate directly with the Library. The Library’s stand on privacy was viewed positively.

The question was raised whether, because of lesser spending in journals, more will be spent in books. On the contrary, Dean Hunter replied, much less is being spent on books, though there are some specific Library endowments that have allowed for book purchasing to continue.
A Senator noted that, as a humanities librarian, she tends to have the largest chunk of the monograph budget assigned to her (since she covers English, history, and other very book-focused areas) and that the books in those subject areas tend to be generally more affordable than in the sciences and social sciences. Thus she has still been able to do some purchasing even in the current budget situation, in order to avoid too many holes in the collection.

In reply to an inquiry from a Senator, Dean Hunter noted that libraries are potentially interested in acquiring private libraries. However, often times there is overlap among private collections.

An off-campus Senator inquired about possible impact on the interlibrary loan system, especially for those who are off-campus and cannot go to the library. Actually, Dean Hunter observed, they are investing more rather than less in interlibrary loan systems. There should be no adverse impact on the functionality of interlibrary loans.

New Business: None

Dean Blaine Eckles joined the meeting, having been unable to be present earlier. Chair Grieb asked whether Senators had additional questions for Dean Eckles about the Coronavirus situation. There were none.

Adjournment: A motion to adjourn (DeAngelis/Fairley) passed unanimously. The meeting was adjourned at 4:43 pm.

Respectfully Submitted,

Francesca Sammarruca
Secretary of the University Faculty & Secretary to Faculty Senate
Call to Order: Chair Grieb called the meeting to order at 3:31 pm.

Approval of Minutes (vote):
There was a motion (Lee-Painter/Cosens) to approve the minutes of the 2019-2020 Faculty Senate Meeting # 20 (February 18, 2020). The following friendly amendments to the minutes were proposed:

- On p.5, within the paragraph starting with “Admissions Committee Chair...”, the sentence starting with “After the first year..” should be replaced with “For at-risk students admitted in one year there was a 65% retention rate. For at-risk students admitted the following year there was a 58% retention rate.”
- On p.5, CEDAR should be replaced with CDAR.

The motion to approve the minutes with the above friendly amendments carried unanimously.

Consent Agenda: None.

Chair's Report:

- University Faculty Meeting is Wednesday, Feb. 26th at 2:30 p.m. (Pacific Time), in the Pitman Center, International Ballroom.
- The Resolution regarding the Vandal Gateway Program (VGP) admittance was forwarded to President Green. We anticipate that he will enact this policy in the next few days. Further follow up with SEM will go on as the implementation of VGP for the pilot cohort moves forward.

The Faculty Secretary shared a message from Scott Green where the President expressed gratitude for the Senate’s help in properly implementing the VGP.

A Senator asked whether programs in colleges other than CLASS and COS will also have the opportunity to be involved in VGP. Indeed, Chair Grieb replied, that will be the case.

A Senator asked whether there was a plan to form a committee or taskforce from the Senate with the charge of assisting with VGP implementation. Chair Grieb replied that there was no specific
action in that direction, although that had been his original idea. We may not have a formalized
Senate VGP taskforce, but FSL is part of the conversation. The goal is for faculty, administrators, and
SEM to work together and report to Senate towards the end of the semester.

- It is time for the Jazz Festival. Efforts to make classroom accommodations are appreciated. Please
  support this as a recruiting event.

There were no additional questions or comments following the Chair’s report.

Provost’s Report:

- The deans have submitted their budget-resetting plans on the 20th. We are in the process of
  collecting those together in a “master sheet”, and then we will meet with the President. It is likely
  that some adjustments will be made. There is nothing definitive yet, but we are approaching the end
  of that process.
- Provost Wiencek has been working with the Academic Program Prioritization Taskforce (APPT). We
  will hear more about that shortly from the APPT Chair.

There were no questions for the Provost.

Committee Reports: None

- Other Announcements and Communications: Academic Program Prioritization Taskforce (Rachel
  Halverson, APPT Chair).

Chair Grieb recalled that the Institutional Planning and Effectiveness Committee (IPEC) convened a
specific taskforce for program prioritization (PP). He noted that, besides guest speaker and APPT
Chair Rachel Halverson, other people involved with APPT were present in the room (such as
Senators Mark Chopin and Barb Cosens, and John Wiencek).

The full report from the APPT Chair is included below:

Academic Program Prioritization Taskforce – Report to Faculty Senate

1. Taskforce selection and meetings
   a. Committee Members:

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<th>Member Name (16 w/ JW &amp; MS)</th>
<th>Employee Type/Work Unit</th>
<th>Email</th>
</tr>
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<tr>
<td>Rachel Halverson, Chair</td>
<td>Faculty (CLASS)</td>
<td><a href="mailto:rhalverson@uidaho.edu">rhalverson@uidaho.edu</a></td>
</tr>
<tr>
<td>Peter Allen</td>
<td>Faculty (COS)</td>
<td><a href="mailto:pballen@uidaho.edu">pballen@uidaho.edu</a></td>
</tr>
<tr>
<td>Jim Alves-Foss</td>
<td>Faculty (COE)</td>
<td><a href="mailto:jimaf@uidaho.edu">jimaf@uidaho.edu</a></td>
</tr>
<tr>
<td>Linda Chen</td>
<td>Faculty (CBE)</td>
<td><a href="mailto:lindachen@uidaho.edu">lindachen@uidaho.edu</a></td>
</tr>
<tr>
<td>Louise-Marie Dandurand</td>
<td>Faculty (CALS)</td>
<td><a href="mailto:lmd@uidaho.edu">lmd@uidaho.edu</a></td>
</tr>
<tr>
<td>Ryan Long</td>
<td>Faculty (CNR)</td>
<td><a href="mailto:ralong@uidaho.edu">ralong@uidaho.edu</a></td>
</tr>
<tr>
<td>Phillip Scruggs</td>
<td>Faculty (CEHHS)</td>
<td><a href="mailto:pwscruggs@uidaho.edu">pwscruggs@uidaho.edu</a></td>
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b. **Staffing:** Terry Grieb and Chad Neilson selected committee members. They strove to ensure representation of all colleges, faculty ranks, and staff. Eight members of the committee had been assigned to serve on UBFC.

c. **Role of Consultants:** David Yopp and Rob Ely were invited to consult on valid assessment methods given their discipline expertise. They also were members of REAPP. Rob Ely attended the taskforce meeting on January 10, 2020. David Yopp and Rob Ely also met separately with the Provost to discuss possible evaluation methods for the committee to use to evaluate program presentations.

d. **Number of Meetings/Topics Addressed:**

There were five meetings: December 13, 2019; January 7, 2020; January 10, 2020; February 7, 2020; and February 24, 2020.

**December 13, 2019 (3 hours):**
- Review of Academic Prioritization Process done in 2017, including recommendations from REAPP (re-envisioning another program prioritization) that the first stage of the process use quantitative measures and the second stage of the process use qualitative measures.
- Discussion of formation of a small committee to review programs’ mission centrality. The taskforce agreed on the following composition: President, Provost, Dean, Department Chair/Head, Faculty member and Staff member.
- Discussion of RBA formula and populating quintiles, including not ranking individual programs within quintiles.

**January 7, 2020 (3 hours):**
- Review of 2017 program prioritization process: 20% mission essentiality, 50% contribution to strategic plan, 30% was how much money is allocated to a program.
- Review of president’s charge for 2020 and REAPP recommendations: 50% conferrals and 50% student credit hours.
- RBA Formula:
  \[
  RBA = \frac{(Tuition + F&A + G&A - GenEd Budget)}{GenEd Budget} \times 100\%
  \]
- Discussion of weighting of conferrals and student credit hours.
- Overview of Current Process Steps Identified:
  1. Quantitative (RBA)
  2. Small Committee Determination of Mission Centrality
  3. AAP formulates recommendations and identifies programs for closure.
  4. Provost shares results with IPEC and the deans.
  5. Recommendation to the President
  6. Appeal Process with the President
January 10, 2020 (3 hours):

- Rob Ely attended this meeting as a guest consultant.
- There was extensive discussion of whether the 50/50 mix of tuition and SCH is appropriate. The committee came to an agreement that the exact weighting will be set after some testing. For the testing process, program names will be removed, consistently giving an alpha description. A sensitivity analysis will determine the most stable range. This will drive the discussion at the next meeting on February 7, 2020.
- The committee continued its discussion of the appeal process. It was decided that the programs identified for elimination give a presentation to the committee consisting of no more than five slides, one point per slide. The committee would work with David and Rob to develop a rubric to evaluate the presentations. Its recommendations to the president would be based on their evaluation of the presentations. These presentations also could be recorded for the president to review as he is making the final decision.
- Presentation protocols will be discussed at the next meeting.

February 7, 2020 (2 hours):

- Jodi Walker, Director of Communications, attended this meeting as a guest.
- The committee reviewed the results of the sensitivity analysis and agreed to use 54% for SCH and 46% for conferrals. This created the least damage, least distortion. It assumes a common production measure across the university. There will be a weighted scoring of 80% RBA and 20% Mission Essentiality.
- The presentation process was revisited and defined further:
  1. Maximum of 5 PPT.
  2. 10-minutes presentation; 20 minutes for Q&A.
  3. Considerations such as job placement, grad school placement, alumni giving, and philanthropy may be included in the presentation.
- The committee understands that it must identify 2.5 million dollars in cuts.
- It was reinforced that the information discussed by the committee is confidential.
- Next Steps:
  1. Data will be disseminated to the deans for their review. The Provost will work with them to clarify the number of programs in the fifth quintile slated for elimination.
  2. At the committee’s next meeting, members will review the data: RBA, rank by RBA, rank by mission essentiality, 80/20 mission score.

February 24, 2020 (1.5 hours):

1. Discussion of reports and recommendations from deans.
2. The committee identified the programs in the fifth quintile that would be invited to give a presentation to the committee.

Extensive discussion followed:

A Senator, also an APPT committee member, noted that the deans looked only briefly at the results of APPT. They do not have the “full overview”, unless a program is in the bottom quintiles. The question was raised about the degree of changes since the previous PP: namely, what percentage of the programs were assigned to a quintile differing by more than two quintiles as compared to 2017? It was replied that, generally, the majority of programs were not far off, although some level of differences is to be expected, because of the qualitative data (narratives) used last time.

The discussion moved to the support, if any, being provided to those faculty who will lose their jobs as a consequence of either APPT or the Deans’ recommendations. The committee has not dealt with
this aspect. Naturally, confidentiality, respect, and sensitivity have to be exercised very carefully when dealing with people going through such a traumatic experience. The Provost agreed that support is important and suggested that Senate make a recommendation on what kind of support to offer.

The discussion shifted to the RBA indicator (defined above). While a Senator pointed out that it is a good starting point for the analysis, another Senator expressed deep concerns about trying to capture with a single number a multi-dimensional process such as the one being discussed, with all its complexities. It does not take into account, for instance, that a program may support other programs, or the complexity of interdependence among different units. On the other hand, it was argued that this single number is actually not used to make decisions, but rather as an initial sort. The APPT Chair noted that the student credit hours (instead of degree conferral) do, to some degree, take this objection into account. Nevertheless, the same Senator argued, there is lack of justice. He stated his opposition to the entire process. The APPT Chair noted that the presentations are an opportunity to bring up aspects specific to a particular program (for instance, the low number or absence of conferrals in a new program).

It was noted that “secular trends” can make a particular discipline unpopular. These changing trends are of course time dependent and may have little to do with the actual quality of a program. A Senator argued that percentiles and quintiles are not an appropriate way to make these decisions, as it became clear already in 2017, although he understands that decisions must be made. This time, he continued, we are still applying the same percentile system. The Provost replied that the State Board (SB) requires that we make decisions based on priorities. However, just because a program is in a low quintile, it does not necessarily mean that it will be closed. Instead, it could be placed on a “Performance Improvement Plan”.

It was noted again that students’ choices to go into a particular field (and thus into a particular program) are driven by many factors, such as family and society, who tend to push students towards areas perceived as more lucrative. Other Senators and the speaker appreciated this point, and emphasized the value of a broad liberal education, independent of “money making” aspects. A Senator argued that low-RBA producing programs do not necessarily have to disappear; however, with less high-RBA producing programs there is less money for everyone.

A Senator wondered about the potential scenario where a program is not available anywhere in the state of Idaho, if the SB and other presidents in the state make similar decisions about a program. The Provost brought up the mission essentiality aspect. Should a program be the only one in the state, that would be taken into account. The deans do have that awareness while making their recommendations. They do not interface directly with APPT, but there is communication between the groups.

A Senator, also APPT committee member, shared that the committee was thoughtful and surprised when they saw the quintiles and noticed how this is going to impact the institution. She said that the Humanities actually do quite well as they are not expensive, whereas more costly programs are in the bottom quintiles. Qualitatively speaking, she continued, there was a lot of discomfort in assigning these numbers to programs. Only people close to those programs can really explain the value of what the programs bring to the institution. Again, the value of a liberal education as an important part of our mission was reiterated. The APPT Chair agreed that the committee will reach a much better understanding about the low-ranking programs after their presentations are delivered.
Some Senators felt there was not enough clarity about measures and metrics, which creates a lot of anxiety in people, as they do not know how programs are being saved or closed. The APPT Chair noted that information about programs to be potentially eliminated is currently being shared with the deans, who may or may not agree with the recommendations. Deans are then encouraged to work closely with those programs on their presentations.

Chair Grieb recalled that a subcommittee (of the APPT) was also involved. Indeed, the Provost followed up, the main task of this subcommittee was to revisit the aspect of mission essentiality, and what is the best way to describe it. They used objective criteria, with their main point being that students should be driving essentiality (see, for instance, English). The subcommittee forwarded their conclusions to APPT.

The next focal point was how this process can be best used for constructive purposes. Will programs in the bottom quintiles receive feedback on how to do better in the future? In fact, that is the purpose of having the deans working with the programs on their presentations. The plan is also to continue improving the PP process, and possibly keep the committee together.

Next, the question was raised whether the top-quintile programs will see increased resources coming their way. The Provost commented that some colleges like CLASS and CBE have been historically underfunded and this may be a way to address that. Although that has been part of the conversation, the committee has not yet made any recommendations in that direction. It is not clear at this point if and how the data will be disseminated. Probably there will be a report. Data will be shared with the deans, who may share it with the faculty in the appropriate units. Faculty Senate should weigh in on how to best balance the importance of transparency and the impact on morale.

Chair Grieb said that the incremental base budget model is not working, as we know. In the future, fair performance should be a measure. In addition, he noted that while some programs like those in the CBE had high RBA’s and ranked in the top quintile, they are not immune to cuts. Despite high quintile rankings the CBE is losing 12-14% of its faculty to budget cuts. All colleges across the university are feeling the impact of the budget cuts.

A Senator emphasized that, if this process is to have any positive outcome, it must be used to improve the quality of programs and their curriculum. We need a process which is logically consistent with the goal of delivering education. We should look at program improvement rather than program cutting.

A Senator and APPT committee member, who was also on the REAPP committee, noted that he does agree with the importance of a broad liberal education, especially in view of the fact that a large fraction of our students are first-generation. At the same time, we must generate revenue to be able to “keep the doors open”. This takes a balance of efforts. The committee decided to focus their attention on the bottom quintiles, requesting that deans work together in consultation with their Chairs to improve the outcomes. Many members of the APPT share the Senator’s view that this should not be a punitive process. We need to have a conversation which leads to the evolution of the institution, and one data point cannot accomplish that. Collectively, we make recommendations (not decisions). We look for programs with the highest degree stability and seek a balance between the institution’s need for resources and essentiality.
A Senator expressed concerns about the concept of one program subsidizing other programs. All of our programs rely on one another in complex ways. There are ways to be important other than making money. We should not “oversimplify” what a program actually brings in. We should not forget that we are here to educate.

Chair Grieb asked what defines a program. That is, at which level (e.g. department level) do we say that a program is a program? Provost Wiencek explained that the SB maintains an inventory of academic programs, and that the programs that were evaluated are those in the SB inventory. In most cases, Chair Grieb followed up, an option is embedded within a major. He inquired about the process to divide revenue and costs for majors vs. options. Provost Wiencek replied that the data are available for the revenue part. As for the costs, the deans are asked to assign dollars to the programs. Within a single department, one may potentially see programs spread out considerably over several quintiles. Useful information can be extracted, for instance, that a department does not need a particular emphasis with those extra courses which require money to staff. On the other hand, there can be “opposite” cases where eliminating a particular option wouldn’t save much money. Holistically, though, all emphases and options roll up into a major. So, the data gathered on programs are generally consistent with what goes on at the department level.

Provost Wiencek said that other aspects are in need of adjustments and will need additional discussion with the Registrar’s office. As of now, we have 30 or 40 Bachelor’s degrees, not only the BA and the BS. Often people confuse major and degree type. For instance, now we would print on a diploma that a student has been awarded a BS in Computer Science with major in Computer Science, obviously redundant information.

There was one last question from a Senator, who, in reference to the F&A appearing in the calculation of the RBA, became worried about protecting faculty involved in interdisciplinary research. Chair Grieb reiterated that this quantitative measure and the RBA does not prevent other qualitative considerations. Provost Wiencek followed up and noted that, when looking at the total amount of money for revenue generated, G&A is only 1% and F&A probably 4-5%. The vast majority is tied up in tuition revenue generation. The challenges concerning interdisciplinary activities do not reside in F&A and G&A, but rather in how we offer courses and programs and co-mentor graduate students.

**New Business:** None

**Adjournment:** A motion to adjourn (A. Smith) passed unanimously. The meeting was adjourned at 4:58 pm.

Respectfully Submitted,

Francesca Sammarruca
Secretary of the University Faculty & Secretary to Faculty Senate
POLICY COVER SHEET
For instructions on policy creation and change, please see www.uidaho.edu/governance/policy.

All policies must be reviewed, approved, and returned by the policy sponsor, with a cover sheet attached, to uofi-policy@uidaho.edu.

Faculty Staff Handbook (FSH)
- Addition X Revision* - Deletion* - Emergency - Minor Amendment
Chapter & Title: Chapter one: 1565 D-5. Librarian

Administrative Procedures Manual (APM)
- Addition - Revision* - Deletion* - Emergency - Minor Amendment
Chapter & Title: ________________________________________________

*Note: If revision or deletion, request original document from uofi-policy@uidaho.edu. All changes must be made using “track changes.”

Originator (see FSH 1460 C)  Ling-Ling Tsao, Library Affairs Committee Chair  2/25/20
Name  ltsao@uidaho.edu  Date
Telephone  Email

Policy Sponsor, if different from Originator
Name  Date
Telephone  Email

Reviewed by General Counsel  X Yes ____No  Name & Date: Kim Rytter 2/25/20

1. **Policy/Procedure Statement:** Briefly explain the reason for the proposed addition, revision, and/or deletion to the Faculty Staff Handbook or the Administrative Procedures Manual.

The current language requiring “an advanced degree in library science from a library school accredited by the American Library Association” is overly restrictive for some of our faculty library positions. For example, it is common practice for academic libraries to accept a terminal degree in archives management or a doctorate in a relevant field (e.g., history) paired with relevant experience for special collections and archives positions; we are currently unable to do so, and it is hurting recruiting efforts in the Library. While most of our library faculty positions will continue to require an advanced degree from an American Library Association accredited school, the flexibility this revision would afford the Library is necessary for a modern academic library.

2. **Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have?

This revision will have no fiscal impact.

3. **Related Policies/Procedures:** Describe other UI policies or procedures related or similar to this proposed change, or that will be impacted by it.

This change will enable the Library to hire, promote, and tenure individuals with a potentially wider range of experience and expertise.

4. **Effective Date:** This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 D) unless otherwise specified in the policy.

July 1, 2020
If not a minor amendment forward to: ___________________________________________

Policy Coordinator
Appr. & Date: ______________________
[Office Use Only]

APM
F&A Appr.: ______________________
[Office Use Only]

FSH
Appr. _____________
FC _____________
GFM _____________
Pres./Prov. _____________
[Office Use Only]

Track # _____________
Date Rec.: _____________
Posted: t-sheet _____________
h/c _____________
web _____________
Register: _____________
(Office Use Only)
PREAMBLE: This section defines the various academic ranks, both faculty and non-faculty (e.g. graduate student appointees and postdoctoral fellows), and their responsibilities. Subsections A, C, D, E, F, and I should be read in conjunction with the policy and procedures concerning granting of tenure and promotions in rank which are contained in 3520 and 3560 (subsection I only in conjunction with 3560). Most of the material assembled in this section was a part of the original 1979 Handbook. The material in section I was added July, 1987. The definitions of 'postdoctoral fellow' (J-5), 'graduate assistant' (K-3) and 'research fellow' (K-4) were revised in July 1996. Section J-1, voting rights for lecturers, was changed in July 2001. Section A was substantially revised in July 1994, so as to underline better the importance of both teaching and scholarship. At that time the so-called “Voxman Amendment” (the addition of 'in the classroom and laboratory' to the list of possible venues wherein the evaluation of scholarship might take place) made its first appearance. Section A underwent additional substantial revision in July 1998 and July 2006, always with the hope of creating greater clarity in a complex subject. Extensive revisions along those same lines were made to B (entirely new and in 2008 B was moved to 3570), C, D, and E, in July 1998. Further, less extensive revisions were made to C-1, D-1, and E-1 in July 2000. In July 2008, this section was reorganized to better reflect classifications as stated in FSH 1520 Article II, no substantive changes were made to policy. In 2009 changes to the faculty position description and evaluation forms integrating faculty interdisciplinary activities into the evaluation processes were incorporated into this policy as of January 2010. Ranks for Associated Faculty in F were removed because the promotion process as detailed in 3560 for faculty ranks was deemed excessive for associated faculty. Those currently holding a specific rank in adjunct or affiliate will retain that privilege. In July 2010 the affiliate and adjunct terms were switched to conform to national norms and rank of Distinguished Professor was added. In July 2011 voting for associated faculty was clarified and Clinical Faculty under “G. Temporary Faculty” moved to “D. University Faculty” as D-9 and was revised. In July 2012 edits were made to the Distinguished Professor under D-8 and to the qualifications for Emeritus status and a search waiver under E. In July 2013 definitions for research and teaching assistants were more clearly defined. In January 2014 the time necessary to qualify for Emeritus status was redefined and in July 2014 the cap on non-tenure track faculty appointments in a unit was adjusted and promotion processes clarified and revised. In July 2018 a new category for graduate support assistants was added to address needs that are not covered under the role of a typical teaching or research assistant position. Further information may be obtained from the Provost’s Office (208-885-6448). [rev. 7-98, 7-00, 7-01, 7-06, 1-08, 7-08, 1-10, 7-10, 7-11, 7-12, 7-13, 7-14, 7-18]

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A. INTRODUCTION. [rev. 7-98]

A-1. The principal functions of a university are the preservation, advancement, synthesis, application, and transmission of knowledge. Its chief instrument for performing these functions is its faculty, and its success in doing so depends largely on the quality of its faculty. The University of Idaho, therefore, strives to recruit and retain distinguished faculty members with outstanding qualifications.

In order to carry out its functions and to serve most effectively its students and the public, the university supports the diversification of faculty roles. Such diversification ensures an optimal use of the university’s faculty talents and resources. [rev. 7-06]

Diversification is achieved through developing a wide range of faculty position descriptions that allow the faculty
to meet the varying responsibilities placed upon the institution, both internally and externally. No more than 25 percent, or a lower limit as defined by the department or similar unit’s by-laws, of the faculty positions in any department or similar unit may be held by instructors, senior instructors, and lecturers who have voting privileges under FSH 1520 II, Section 1. While the capabilities and interests of the individual faculty members are to be taken into account, it is essential that individual faculty position descriptions are consonant with carrying out the roles and mission of the university, the college, and the unit. Annual position descriptions are developed by the unit head in consultation with the unit faculty and with the incumbent or new faculty member. In each college, all position descriptions are subject to the approval of the dean and must be signed by both unit head and faculty member. If the faculty member, unit head, and dean are unable to reach agreement on the position description, the faculty member may appeal the unit head’s decision to the Faculty Appeals Hearing Board [FSH 3840]. [ed. 1-10, rev. 7-14]

As indicated in Sections 3320-A-1, 3520-G-3, 3560-B, faculty performance evaluations that are used for yearly, third year and periodic reviews as well as for promotion, tenure, and post-tenure decisions are to be based on faculty members’ annual position descriptions (FSH 3050). Each unit will develop criteria in its bylaws for promotion and review of its faculty (FSH 1520 II, Section 1). The committee for all reviews will be defined in unit bylaws and shall include tenure-track faculty (see FSH 3560 E-2 c). [ed. 1-08, 7-10, 7-14]

Faculty members shall conduct themselves in a civil and professional manner (see FSH 3160 and 3170). [add. 1-10]

B. DEFINITIONS: [add. 1-10]

B-1. Advancement: focuses on fostering relationships, building partnerships, creating awareness and generating support with alumni, donors, leaders, business partners, legislators and the community for the university’s mission in academics, scholarship and outreach (see the office of University Advancement at http://www.uidaho.edu/givetoidaho/meetourpeople/universityadvancementvpoffice.aspx).

B-2. Cooperative education: a structured educational strategy that blends classroom studies with learning through productive work experiences. It provides progressive experiences for integrating theory and practice. Co-op education (including internships and externships) is a partnership between students, educational institutions and employers, with specified responsibilities for each party.

B-3. Distance education: the process through which learning occurs when teachers, students, and support services are separated by physical distance. Technology, sometimes in tandem with face-to-face communication, is used to bridge the distance gap.

B-4. Extension Service: Extension is an outreach activity that generally involves non-formal educational programs that transfer knowledge from the university to help improve people’s lives through research in areas like agriculture and food, environment and natural resources, families and youth, health and nutrition, and community and economic development.

B-5. Extramural Professional Service: refers to activities that extend service beyond the university and can include elements of service, outreach, scholarship, and/or teaching.

B-6. Interdisciplinary: “an activity that involves teams or individuals that integrates information, data, techniques, tools, perspectives, concepts, and/or theories from two or more disciplines or bodies of specialized knowledge to advance fundamental understanding or to solve problems whose solutions are beyond the scope of a single discipline or field of research practice.”1

B-7. Professional Development: a learning process that expands the capacity of the faculty member to advance in the responsibilities as defined in his/her position description and aligns with the university’s goals. Examples include but are not limited to participation in conferences, continuing professional education (including credit and noncredit courses) and other activities that enhance a faculty member’s expertise and ability.

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1 National Academy of Science
B-8. **Service learning:** an activity that integrates student learning with service and civic engagement to meet real community needs and achieve learning outcomes. Service-learning can be used in curricular settings (i.e. academic courses) or co-curricular settings, (e.g. ASUI’s volunteer/civic engagement programs).

B-9. **Technology transfer:** a process through which knowledge, technical information, and products developed through various kinds of scientific, business, and engineering research are provided to potential users. Technology transfer encourages and accelerates testing and using new knowledge, information and products. The benefit of technology transfer may occur either at the community (public) or firm (private) level.

B-10. **Unit Administration:** includes assisting higher administration in the assignment [3240 A] and in the evaluation [3320 and 3340] of the services of each member of the unit’s faculty and staff; promoting effective leadership of personnel and management of unit resources; providing leadership in the development and implementation of unit plans; providing for open communication with faculty and staff; fostering excellence in teaching, scholarship and outreach for faculty, students, and staff in the unit; effectively representing all constituents of the unit; and continuing personal professional development in areas of leadership.

C. **RESPONSIBILITY AREAS:** Faculty members are expected to contribute in each of the four major responsibility areas (C-1 through C-4 below). Expectations are more specifically defined in the individual position description and are consistent with unit by-laws. Each responsibility area may include activities in advancement, extramural professional service, interdisciplinary, and/or professional development. [add. 1-10]

C-1. **TEACHING AND ADVISING:** The university’s goal is to engage students in a transformational experience of discovery, understanding and global citizenship. Faculty achieve this goal through effective instructing, advising and/or mentoring of students. [add. 1-10]

a. **Instruction:** Effective teaching is the foundation for both the advancement and transmission of knowledge. The educational function of the university requires the appointment of faculty members devoted to effective teaching. Teaching may take many different forms and any instruction must be judged according to its central purposes. Active participation in the assessment of learning outcomes is expected of all faculty at the course, program, and university-wide levels. Individual colleges and units have the responsibility to determine appropriate teaching loads for faculty position descriptions. Teaching appointments must be reflected by hours and level of effort spent in teaching activity, and justified in position descriptions. Any adjustments to a teaching appointment (e.g. teaching unusually large classes, team-teaching, teaching studios or laboratories, intensive graduate or undergraduate student mentoring, technology-enhanced teaching, and others) must be documented in the position description. [rev. 7-06, ed. 1-10]

The validation of instruction may include Student Evaluations of Teaching (SETs), peer evaluations, self-assessment, documentation of effective or innovative teaching, teaching recognition and awards, and teaching loads. [add. 1-10]

b. **Advising and/or Mentoring Students:** Advising students is also an important faculty responsibility and a key function of academic citizenship. Student advising may include: (1) overseeing course selection and scheduling; (2) seeking solutions to conflicts and academic problems; (3) working with students to develop career goals and identify employment opportunities; (4) making students aware of programs and sources for identifying employment opportunities, (5) facilitating undergraduate and graduate student participation in professional activities (e.g. conferences, workshops, demonstrations, applied research); and (6) serving as a faculty advisor to student organizations or clubs. Advising also includes attendance at sessions (e.g. workshops, training courses) sponsored by the university, college, unit, or professional organizations to enhance a faculty member’s capacity to advise. [add. 7-06, rev. 1-08, ed. 1-10]

Effective advising performance may be documented by: (1) the evaluation of peers or other professionals in the unit or college; (2) undergraduate or graduate student advisees’ evaluations; (3) level of activity and accomplishment of the student organization advised; (4) evaluations of persons being mentored by the candidate; (5) number of undergraduate and graduate students guided to completion; and (6) receiving awards for advising, especially those involving peer evaluation. [add. 7-06, ed. 1-10]
C-2. SCHOLARSHIP AND CREATIVE ACTIVITIES: Scholarship is creative intellectual work that is communicated and validated. The creative function of a university requires the appointment of faculty members devoted to scholarship and creative activities. The university promotes an environment that increases faculty engagement in interdisciplinary scholarship. The university’s Carnegie designation as “research university high” fosters an emphasis on scholarly and creative activities. [rev. 1-10]

Scholarship and creative activities take diverse forms and are characterized by originality and critical thought. Both must be validated through internal and external peer review or critique and disseminated in ways having a significant impact on the university community and/or publics beyond the university. Both are ongoing obligations of all members of the faculty. [rev. 7-06, 1-10]

The basic role of a faculty member at the University of Idaho is to demonstrate and validate continuing sound and effective scholarship in the areas of teaching and learning, artistic creativity, discovery, integration, and outreach/application/engagement. While these areas may overlap, these distinctions are made for purposes of defining position descriptions and for developing performance standards. Units and colleges shall adopt criteria for the evaluation of scholarship and creative activities. Demonstrated excellence that is focused in only one of these scholarship and creative activity areas is acceptable if it is validated and judged to be in the best interests of the institution and the individual faculty member. [rev. 7-06, 1-10]

a. Scholarship in Teaching and Learning: can involve classroom action research (site-specific pedagogy), qualitative or quantitative research, case studies, experimental design and other forms of teaching and learning research. It consists of the development, careful study, and validated communication of new teaching or curricular discoveries, observations, applications and integrated knowledge and continued scholarly growth. Evidence that demonstrates this form of scholarship might include: publications and/or professional presentations of a pedagogical nature; publication of textbooks, laboratory manuals, or educational software; advancing educational technology; presentation in workshops related to teaching and learning; development and dissemination of new curricula and other teaching materials to peers; and individual and/or collective efforts in securing and carrying out education grants. [ed. 7-00, rev. 7-06]

The validation of scholarship in the area of teaching and learning is based in large measure on evaluation by the faculty member’s peers both at the University and at other institutions of higher learning. [rev. 7-06]

b. Scholarship in Artistic Creativity: involves validated communication and may be demonstrated by significant achievement in an art related to a faculty member’s work, such as musical composition, artistic performance, creative writing, mass media activity, or original design. [rev. 7-06, 1-10]

The validation of scholarship in the area of artistic creativity is based in large part on the impact that the activity has on the discipline and/or related fields as determined by the peer review process. Many modes of dissemination are possible depending on the character of the art form or discipline. For example, a published novel or book chapter for an anthology or edited volume or similar creative work is regarded as scholarship. Each mode of dissemination has its own form of peer review that may include academic colleagues, practitioner or performance colleagues, editorial boards, and exhibition, performance, or competition juries. [rev. 7-06]

c. Scholarship in Discovery: involves the generation and interpretation of new knowledge through individual or collaborative research. It may include: novel and innovative discovery; analyzing and synthesizing new and existing knowledge and/or research to develop new interpretations and new understanding; research of a basic or applied nature; individual and collaborative effort in securing and carrying out grants and research projects; membership on boards and commissions devoted to inquiry; and scholarly activities that support the mission of university research centers. [rev. 7-06]

Evidence of scholarship in this area may include: publication of papers in refereed and peer reviewed journals; published books and chapters; published law reviews; citation of a faculty member’s work by other professionals in the field; published reviews and commentary about a faculty member’s work; invited
presentations at professional meetings; seminar, symposia, and professional meeting papers and presentations; direction and contribution to originality and novelty in graduate student theses and dissertations; direction and contribution to undergraduate student research; awards, scholarships, or fellowships recognizing an achievement, body of work, or career potential based on prior work; appointment to editorial boards; and significant scholarly contributions to university research centers. The validation of scholarship in the area of discovery is based on evaluation by other professionals in the faculty member’s discipline or sub-discipline. [rev. 7-06]

d. Scholarship of Integration: often interdisciplinary and at the borders of converging fields, is the serious, disciplined work that seeks to synthesize, interpret, contextualize, critically review, and bring new insights into, the larger intellectual patterns of the original research. Similar to the scholarship of discovery, the scholarship of integration can also seek to investigate, consolidate, and synthesize new knowledge as it integrates the original work into a broader context. It often, but not necessarily, involves a team or teams of scholars from different backgrounds working together, and it can often be characterized by a multidisciplinary or interdisciplinary investigative approach. The consolidation of knowledge offered by the scholarship of integration has great value in advancing understanding and isolating unknowns. Beyond the differences, the scholarship of integration can include many of the activities of scholarship of discovery and thus may be rigorously demonstrated and validated in a similar manner. [add. 7-06]

e. Scholarship of Outreach/Application/Engagement: These activities apply faculty members’ knowledge and expertise to issues that impact individuals, communities, businesses, government, or the environment. Examples may include economic development, environmental sustainability, stimulation of entrepreneurial activity, integration of arts and sciences into people’s lives, enhancement of human well being, and resolution of societal problems. Like other forms of scholarship and creative activities, the scholarship of outreach/application/engagement involves active communication and validation. Examples of validation may include (but are not limited to): peer reviewed or refereed publications and presentations; patents, copyrights, or commercial licensing; adoption or citation of techniques as standards of practice; invited presentation at a seminar, symposium or professional meeting; and citations of the faculty member’s work. [add. 7-06, rev. 1-10]

C-3. OUTREACH and EXTENSION: Outreach activities are originated by every unit on UI’s Moscow campus and from each of the University’s physical locations around the state. [add. 1-10]

Outreach includes a wide variety of activities including, but not limited to, (a) extension (see 1565 B); (b) teaching, training, certification, and other dissemination of information to the general public, practitioner, and specialty audiences; (c) volunteer development and establishment/maintenance of relationships with private and public organizations; and (d) unpaid extramural consultation and other professional services to individuals, organizations, and communities. Delivery mechanisms include distance education, service learning, cooperative education, technology transfer, noncredit courses, and publications. Most of the examples provided, such as distance education, are not exclusively outreach. Instead, they lie at the intersection of outreach and teaching or research. Likewise, professional services may be associated with teaching, scholarship, or university service and leadership. A faculty member’s position description specifies where his or her outreach activities will be counted. [rev. 1-10]

Evidence of effective outreach activities may include, but are not limited to, (1) documentation of the process by which needs were identified and what steps were taken to deliver carefully planned and implemented programs; (2) numbers of individuals and types of audiences affected; (3) evaluation by participants in outreach activities; (4) other measures of significance to the discipline/profession, state, nation, region and/or world; (5) quantity and quality of outreach publications and other mass-media outlets; (6) evaluation of the program’s effects on participants and stakeholders; (7) awards, particularly those involving peer evaluation; (8) letters of commendation from individuals within organizations to whom service was provided; (9) service in a leadership role of a professional or scientific organization as an officer or other significant position; and (10) other evidence of professional service oriented projects/outputs. [rev. 1-10]

C-4. UNIVERSITY SERVICE AND LEADERSHIP: The university seeks to create formal and informal organizational structures, policies, and processes that enable the university community to be effective, while also
fostering a climate of participatory decision making and mutual respect. [add. 1-10]

a. Intramural service is an essential component of the University of Idaho mission and is the responsibility of faculty members in all units. Service by members of the faculty to the university in their special capacities as scholars should be a part of both the position description and annual performance review. [add. 7-06, rev. 1-08, ed. 1-10]

Within the university, intramural service includes participation in unit, college, and university committees, and any involvement in aspects of university governance and academic citizenship. University, college, and unit committee leadership roles are seen as more demanding than those of a committee member or just regularly attending faculty meetings. Because faculty members play an important role in the governance of the university and in the formulation of its policies, recognition should be given to faculty members who participate effectively in faculty and university governance. Intramural service can include clinical service, routine support, and application of specialized skills or interpretations, and expert consultancies. The beneficiaries of these forms of service can be colleagues and co-workers. [rev. 1-10]

Effective performance in intramural service may be documented by a variety of means. Examples include: (1) letters of support from university clientele to whom your service was provided; (2) serving as a member or chairperson of university, college, or unit committees; and (3) receiving University service awards, especially those involving peer evaluation. [rev. 1-10]

b. Administration:

(1) Unit Administration (see FSH 1565 B): FSH 1420 E describes the responsibilities and the selection and review procedures for unit administrators. Unit administration is not normally considered in tenure and promotion deliberations; it is accounted for insofar as expectations are proportionally adjusted in the other sections of the position description. For faculty in nonacademic units (e.g. faculty at large), administration may be considered in tenure and promotion deliberations. [add. 7-06, rev. 1-10]

(2) Other: Effective conduct of university programs requires administrative activities that support scholarship, outreach and teaching. Program support activities are to be noted in position descriptions and performance reviews. The role of the principal or co-investigator of a university program or project may include the following administrative responsibilities: (1) budgetary and contract management; (2) compliance with University purchasing and accounting standards; (3) supervision and annual review of support personnel; (4) purchasing and inventory management of goods; (5) graduate student and program personnel recruitment, training in University procedures/policies, and annual review; (6) collaborator coordination and communication; (7) management of proper hazardous waste disposal; (8) laboratory safety management; (9) authorization and management of proper research animal care and use; (10) authorization and management of human subjects in research; (11) funding agency reporting; (12) intellectual property reporting; and (13) compliance with local, state, and federal regulation as well as University research policy. [add. 7-06, rev. 1-10]

Demonstration of effective administration may be documented by a variety of means. Examples include: (1) compliance with applicable rules, standards, policies, and regulations; (2) successful initiation, conduct and closeout of research contracts and grants as evidenced by timely reporting and budget management; (3) completion of the research contract or proposal scope-of-work; organized program operations including personnel and property management. Documentation of effective university program operation, beyond scholarship, may also include input by graduate and undergraduate students participating in the university program; and input by collaborators, cooperators, funding agency and beneficiaries of the program. Documentation of effective administration may include evaluations by faculty and staff, as well as objective measures of performance under the incumbent’s leadership. [add. 7-06, rev. 1-10]

D. UNIVERSITY FACULTY (FSH 1520 Article II):

D-1. INSTRUCTOR: Instructors may be appointed for the purpose of performing practicum, laboratory, or
classroom teaching. Appointment to instructor constitutes a recognition of the appointee’s scholarly contributions and professional accomplishments, and confers responsibilities and privileges as stated below. To avoid confusion over university faculty (those who have voting rights per FSH 1520 II, Section 1) the title of Instructor shall not be used in any other university position.

**a. Instructor.** Appointment to this rank requires proof of advanced study in the field in which the instructor will teach, the promise of teaching effectiveness, and satisfactory recommendations. Instructors have charge of instruction in assigned classes or laboratory sections under the general supervision of the departmental administrator. When they are engaged in teaching classes with multiple sections, the objectives, content, and teaching methods of the courses will normally be established by senior members of the faculty or by departmental committees. Instructors are expected to assist in the general work of the department and to make suggestions for innovations and improvements.

**b. Senior Instructor.** Appointment to this rank requires qualifications that correspond to those for the rank of instructor and evidence of outstanding teaching ability. Instructors are promotable to senior instructor [see FSH 3560]. Effective teaching is the primary responsibility of anyone holding this rank and this primary responsibility is weighted accordingly in the annual performance evaluation and when a senior instructor is being considered for tenure. Except in very rare instances, this rank is considered terminal (i.e., it does not lead to promotion to the professorial ranks and there is no limitation on the number of reappointments). Prospective appointees to the rank of senior instructor must be fully informed of its terminal nature.

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**D-2. FACULTY:**

**a. Assistant Professor.** Appointment to this rank normally requires the doctorate or appropriate terminal degree. In some situations, however, persons in the final stages of completing doctoral dissertations or with outstanding talents or experience may be appointed to this rank. Evidence of potential effective teaching and potential scholarship in teaching and learning, artistic creativity, discovery, and outreach/application/engagement is a prerequisite to appointment to the rank of assistant professor. Appointees in this rank have charge of instruction in assigned classes or laboratories and independent or shared responsibility in the determination of course objectives, methods of teaching, and the subject matter to be covered. Assistant professors are expected to demonstrate the ability to conduct and direct scholarly activities, and to provide intramural and extramural professional service. [1565 C [rev. 7-98, 7-00, 1-10, ed. 7-12]

**b. Associate Professor.** Appointment or promotion to this rank normally requires the doctorate or appropriate terminal degree. In some situations, however, persons with outstanding talents or experience may be appointed or promoted to this rank. Associate professors must have demonstrated maturity and conclusive evidence of having fulfilled the requirements and expectations of the position description. An appointee to this rank will have demonstrated effective teaching or the potential for effective teaching, the ability to conduct and direct scholarly activities in his or her special field, and provide service to the university and/or his or her profession. Evidence of this ability includes quality publications or manuscripts of publishable merit; and/or unusually productive scholarship in teaching and learning; and/or significant artistic creativity; and/or major contributions to the scholarship of outreach/application/engagement. Associate professors generally have the same responsibilities as those of assistant professors, except that they are expected to play more significant roles in initiating, conducting, and directing scholarly activities, and in providing intramural and extramural professional service. [1565 C [rev. 7-98, 1-10, rev. and ren. 7-00]

**c. Professor.** Appointment or promotion to this rank normally requires the doctorate or appropriate terminal degree. A professor should have intellectual and academic maturity, demonstrated effective teaching or the potential for effective teaching and the ability to organize, carry out, and direct significant scholarship in his or her major field. A professor will have made major scholarly contributions to his or her field as evidenced by several quality publications and/or highly productive scholarship in one or more of the areas of teaching and learning, discovery, artistic creativity, and outreach/application/engagement. Professors have charge of courses and supervise research, and are expected to play a major role of leadership in the development of academic policy, and in providing intramural and extramural professional service. [1565 C [rev. 7-98, 1-10, rev. and ren. 7-00]
D-3. RESEARCH FACULTY:

a. Assistant, Associate and Professor. Appointment to these ranks requires qualifications, except for teaching effectiveness, that correspond to their respective ranks as for faculty in D-2 above. [ed. 7-12]

D-4. EXTENSION FACULTY:

a. Extension Faculty with Rank of Instructor. Appointment to this rank requires: sound educational background and experience for the specific position; satisfactory standard of scholarship; personal qualities that will contribute to success in an extension role; evidence of a potential for leadership, informal instruction, and the development of harmonious relations with others. [rev. 7-98]

b. Extension Faculty with Rank of Assistant Professor. Appointment to this rank requires a master’s degree along with the qualifications of extension faculty with rank of instructor and: demonstrated leadership ability in motivating people to analyze and solve their own problems and those of their communities; evidence of competence to plan and conduct an extension program; a record of effectiveness as an informal instructor and educational leader; proven ability in the field of responsibility; evidence of continued professional growth through study and participation in workshops or graduate training programs; acceptance of responsibility and participation in regional or national training conferences; membership in appropriate professional organizations, and scholarship in extension teaching or practical application of research; demonstrated ability to work in harmony with colleagues in the best interests of UI and of the people it serves. [rev. 7-98]

c. Extension Faculty with Rank of Associate Professor. In addition to the qualifications required of extension faculty with rank of assistant professor, appointment or promotion to this rank requires: achievement of a higher degree of influence and leadership in the field; continued professional improvement demonstrated by keeping up to date in subject matter, extension teaching methods, and organization procedures; progress toward an advanced degree if required in the position description; demonstrated further successful leadership in advancing extension educational programs; evidence of a high degree of insight into county and state problems of citizens and communities in which they live, and the contribution that education programs can make to their solution; an acceptance of greater responsibilities; a record of extension teaching or practical application of research resulting in publication or comparable productivity; a reputation among colleagues for stability, integrity, and capacity for further significant intellectual and professional achievement. These activities may occur in a domestic or international context. [rev. 7-98, ed. 1-10]

d. Extension Faculty with Rank of Professor. In addition to the qualifications required of extension faculty with rank of associate professor, appointment or promotion to this rank requires: regional or national recognition in the special professional field or area of responsibility; a record of successful organization and direction of county, state, or national programs; an outstanding record of creative extension teaching or practical application of research resulting in significant publications or comparable scholarship; active membership and effective participation in professional committee assignments and other professional organization activities; demonstrated outstanding competence in the field of responsibility; achievement of full maturity as an effective informal teacher, wise counselor, leader of extension educational programs, and representative of the university. These activities may occur in a domestic or international context. [rev. 7-98, ed. 1-10]

D-5. LIBRARIAN:

a. Librarian with Rank of Instructor. Appointment to this rank requires an advanced degree in library science from a library school accredited by the American Library Association or an equivalent terminal degree and relevant experience and: (a) evidence of potential for successful overall performance and for development as an academic librarian; (b) when required for specific positions (e.g., cataloger, assistant in a subject library), knowledge of one or more subject areas or pertinent successful experience in library work.

b. Librarian with Rank of Assistant Professor. Appointment to this rank requires the qualifications for librarian with rank of instructor and: (a) demonstrated ability, competence, and effectiveness in performing...
assigned supervisory-administrative, specialized public service, or technical service responsibilities; (b) demonstrated ability to establish and maintain harmonious working relationships with library colleagues and other members of the university community; (c) evidence of professional growth through study; creative activity; participation in workshops, conferences, seminars, etc.; participation in appropriate professional organizations; awareness of current developments in the profession and ability to apply them effectively in the area of responsibility; (d) service to the library, university, or community through committee work or equivalent activities.

c. Librarian with Rank of Associate Professor. Appointment or promotion to this rank requires the qualifications applicable to the lower ranks of librarians and: (a) acceptance of greater responsibilities, and conclusive evidence of success in the performance of them, e.g., bibliographical research performed in support of research activities of others; development of research collections; the preparation of internal administrative studies and reports; interpreting, and facilitating effective use of, the collections; effectively applying bibliographic techniques for organizing library collections; effective supervision of an administrative unit; (b) evidence of further professional growth, as demonstrated by keeping up to date in subject matter, methods, and procedures and by practical application of research resulting in significant improvement of library operations or in publication; effective participation in the work of appropriate professional organizations; and/or formal study, either in library science or in pertinent subject areas; (c) evaluation by colleagues as a person of demonstrated maturity, stability, and integrity, with the capacity for further significant intellectual and professional achievement. These activities may occur in a domestic or international context. [ed. 1-10]

d. Librarian with Rank of Professor. Appointment or promotion to this rank requires the qualifications applicable to the lower ranks of librarians and: (a) demonstrated outstanding competence in the area of responsibility; (b) achievement of an outstanding record of creative librarianship, of effective administration, or of practical application of research resulting in significant publications or comparable productivity; (c) an additional degree in library science or in a pertinent subject area or equivalent achievement; (d) regional or national recognition for contributions to the profession based on publications or active and effective participation in the activities of professional organizations; (e) evaluation by colleagues as an effective librarian who will continue to recognize that optimum productivity is a reasonable personal goal. These activities may occur in a domestic or international context. [ed. 1-10]

D-6. PSYCHOLOGIST OR LICENSED PSYCHOLOGIST:

a. Psychologist with Rank of Instructor. Appointment to this rank requires: an advanced degree in counseling, counseling psychology, clinical psychology, or closely related field earned in a professional program accredited by the appropriate accrediting association; evidence of effective skills in counseling or therapy; and evidence of pursuit of a terminal degree.

b. Psychologist or Licensed Psychologist with Rank of Assistant Professor. Appointment to this rank requires the qualifications for psychologist with rank of instructor and: a doctoral or equivalent terminal degree; evidence of effective skills in counseling or therapy; awareness of current developments in the profession; and demonstrated potential for participation in appropriate professional organizations, service to the Counseling and Testing Center, the university, and the community through teaching, committee membership, or equivalent activities, and the development and execution of research projects or the development and execution of outreach services designed to benefit UI students.

c. Licensed Psychologist with Rank of Associate Professor. Appointment or promotion to this rank requires the qualifications applicable to the lower ranks of psychologists and: possession of a license as a psychologist in the state of Idaho; evidence of continued development of skills in counseling or therapy, as demonstrated by attendance at training workshops, personal study that leads to the presentation of workshops, classes, or seminars, or private study that leads to in-service training of personnel of the Counseling and Testing Center; evidence of continued professional development through service in professional organizations; evidence of effective teaching or training; completion of research that has resulted in quality publications or manuscripts of publishable merit, or the design and implementation of a continuing program in the Counseling and Testing Center that is of benefit to UI students and represents professional achievement of publishable merit; and
continued service to the university and community through committee work or participation in community organizations. These activities may occur in a domestic or international context. [ed. 1-10]

d. Licensed Psychologist with Rank of Professor. Appointment or promotion to this rank requires the qualifications applicable to the lower ranks of psychologists and: demonstration of outstanding competence in counseling or therapy; establishment of an outstanding record in research and publication or in development of continuing programs that contribute to the betterment of university students; continued professional improvement through private study, directed study, or attendance at workshops, conventions, etc.; regional or national recognition for contributions to the profession through publication, presentation of workshops, or active and effective participation in the activities of professional organizations; and recognition by colleagues as an effective psychologist who realizes that optimum productivity is a reasonable personal goal. These activities may occur in a domestic or international context. [ed. 1-10]

D-7. OFFICER-EDUCATION: Appointment of persons to the faculties of the officer education programs was established for the purpose of ensuring the academic soundness of the programs. The dual role of these faculty members as military officers and academic instructors is recognized. The university expects the nominees to have demonstrated academic and intellectual capabilities and exemplary professional achievement. Specifically, UI expects: [ed. 1-10]

a. Academic Preparation. It is desirable for officer education faculty members to have at least a master’s degree. In his or her most recent education, the officer should have a superior academic record as demonstrated by such measures as high grade-point average in graduate school, being in the upper half of the class in graduate school, or superior graduate-level ability as attested in letters of recommendation from graduate-school professors. [ed. 1-10]

b. Specialized Preparation. The officer must have significant education, experience, or formal preparation in the subject areas in which he or she will teach.

c. Military Background and Preparation. A junior officer is expected to have had significant professional performance and experience. It is also desirable that the officer have some formal military education beyond commissioning. A senior officer should have broad experience with excellent performance. He or she is expected to have attended a junior or senior military college and to have made a distinguished record there.

d. Teaching. It is desirable for officers to have had some teaching experience. It is recognized that this is not always possible for junior officers. For such an officer, there should be some evidence that he or she will become a satisfactory teacher. Heads of officer education programs are expected to be experienced instructors.

e. Nominees who will pursue graduate studies at UI for one year before becoming an instructor will be given preliminary approval. In their last semester of full-time graduate enrollment, the service should submit the required information to the Officer Education Committee for regular, final approval. For preliminary approval, the officer should, in addition to the military requirement, show promise of being successful in graduate studies. This could be demonstrated by (a) a high score on the Graduate Record Examination, if taken, (b) full enrollment status as a graduate student at UI, (c) a high overall grade-point average in college (3.00 or above on a 4-point scale), (d) a high grade-point average in a major area, or (e) a good record in the final year of college and graduate-level ability as attested by letters of recommendation from college professors. [rev. 1-10]

f. Appointment:

1. The following information is submitted by the nominee’s service: (1) transcripts from undergraduate and graduate academic institutions; (2) transcripts or appropriate records from military schools and staff colleges; (3) at least three letters of recommendation from appropriate sources, such as former professors, military instructors, and supervisors or commanders. These letters should be concerned with matters such as the officer’s civilian academic performance, military record and leadership ability, and actual or potential performance as a teacher. (Former supervisors or commanders could give their opinion based on the officer’s demonstration of leadership ability and his or her experience as a training officer.); (4) a
summary of the officer’s duty assignments and military and teaching positions held; (5) copies of favorable communications from the officer’s file.

2. The following is provided by the program unit concerned: (1) a description of the military schools attended and courses completed by the nominee; (2) a description of the positions held by the nominee; (3) an explanation of the appropriateness of the officer’s experience and training to the courses he or she will teach.

3. Copies of the requested material are distributed by the local unit to the members of the Officer Education Committee at least 72 hours before the meeting at which the committee will consider the nominee. For appointments commencing in the fall, this information should normally be made available not later than the preceding May 1.

4. In the case of a person nominated to head an officer education program, UI may require a personal interview.

5. A minimum of two weeks, after receipt of all required information, is necessary for consideration of the nominee. UI notifies the nominee’s service of its decision within one month.

D-8. UNIVERSITY DISTINGUISHED PROFESSOR: Acknowledgment of outstanding academic contributions to the university is appropriate and desirable. The rank of University Distinguished Professor is bestowed upon University of Idaho faculty in recognition of sustained excellence in teaching, scholarship, outreach, and service. The rank will be held for the remainder of the recipient’s active service at the University; if the recipient leaves the University and is eligible for emeritus status, the rank will change to University Distinguished Professor Emeritus. The rank is highly honorific and therefore will be conferred on no more than three faculty members university-wide in any given academic year. Selection of University Distinguished Professors will reflect the diversity of scholarly fields at the University. University Distinguished Faculty will receive a stipend of at least $5,000 per year for five years to be used to enhance salary or support professional activities (e.g., professional travel, student support, equipment, materials and supplies, etc.). Final discretion in conferring the rank of Distinguished Professor and the number of appointments in a given year resides with the President. [add. 7-10, rev. 7-12, 8-12]

a. Selection Criteria: In general, University Distinguished Professors will have received national and usually international recognition. They will have brought distinction to the University through their work. [ed. 7-12]

University Distinguished Professors will have achieved a superior record in the following areas: scholarly, creative, and artistic achievement; breadth and depth of teaching; and University service and service involving the application of scholarship, creative, or artistic activities to addressing the needs of one or more external publics. [rev. 7-12]

University Distinguished Professorships will be conferred on members of the University of Idaho Faculty who have attained the rank of Professor and have completed a minimum of seven years of service at the University, typically at the rank of Professor. [rev. 7-12]

b. Selection Process: University Distinguished Professorships will be awarded by the president upon recommendation of The University Distinguished Professorship Advisory Committee a standing committee composed of four faculty members and three deans. The committee members should reflect all dimensions of diversity in the university community. They will be appointed by the Provost to serve three-year terms on a staggered basis. Nominations will be made by Faculty Senate and the Academic Deans, in consultation with faculty and administrators of units. Committee members must be tenured professors who themselves have outstanding records of teaching, research and/or outreach. [rev. 7-12]

2 As a result of Development Fund efforts, endowment support eventually may be obtained for many University Distinguished Fellowships, in which case a donor’s name may be added to the title.[ed. 7-12]

3 Scholarship in this context includes scholarship of discovery, scholarship of pedagogy, scholarship of application and integration, and artistic creativity.
1. The Provost will request nominations from faculty, deans, directors and unit administrators annually. [rev. 7-12]

2. Written nominations will be submitted to the Provost and must include: [ed. 7-12]
   a. A nominating letter with a brief summary of the candidate’s achievements; [rev. 7-12]
   b. The candidate’s curriculum vitae, including a list of any significant previous awards;
   c. Letters of endorsement from the appropriate deans and unit administrators or director(s). The candidate may also include a maximum of three additional letters of support, as appropriate, from students, colleagues at the University of Idaho, and/or other institutions. Letters should describe the impact of the nominee on her/his field, evidence of external recognition, and the context of her/his work over the course of her/his employment. [rev. 7-12]

3. The University Distinguished Professorship Advisory Committee reviews the nominations and makes recommendations to the Provost for transmittal to the President. [rev. 7-12]

4. Because the rank of University Distinguished Professorship is intended to be highly honorific, it is possible that in a given year no candidates will be selected. [ed. 7-12]

5. The applications of nominees who are not selected in the first year of nomination will remain active for a total of three years. Nominators will have the opportunity to update their nomination during subsequent years in which their candidate is under consideration.

D-9. CLINICAL FACULTY: Clinical faculty may be appointed for the purpose of performing practicum, laboratory, or classroom teaching. Clinical faculty is a non-tenure track position. Clinical faculty positions are appropriate for professional disciplines having strong applied and/or clinical elements or those serving university units or academic departments in a supporting capacity. Appointment to clinical-faculty status constitutes a recognition of the appointee’s scholarly contributions and professional accomplishments, and confers responsibilities and privileges as stated in a below. Clinical faculty members may be appointed and/or promoted (FSH 3560 D-2) to the ranks of clinical assistant professor, clinical associate professor or clinical full professor. [rev. 7-11, ed. 7-14]

a. Responsibilities, Privileges, and Rights. A clinical faculty member has a primary employment responsibility in a UI unit. The relationship of a clinical faculty member to UI is essentially that of a collaborator with a UI unit, program, or faculty member. The guarantees afforded by the principle of academic freedom [see 3160] are extended to members of the clinical faculty. They have the same responsibilities and privileges as university faculty (FSH 1520 II 1) [rev. 7-11]

Clinical faculty members perform administrative, analytical, and research functions that complement UI’s mission in teaching, research, and service.

1. Clinical faculty members may have teaching as a primary or major responsibility; in addition, they may advise students on their academic or professional programs, participate in research projects, serve on graduate students’ supervisory committees, engage in outreach and engagement activities, and act as expert advisers to faculty members or groups. [rev. 7-11]

2. The nature and extent of the services to be rendered are determined jointly by the clinical faculty member, his or her immediate supervisor, and the unit administrator(s) concerned.

b. Qualifications. Assignment to a clinical faculty position is based on demonstrated knowledge and experience, academic degrees, scholarly contributions, or other professional accomplishments comparable to those expected of faculty within the unit. [ed. 7-11]

c. Conversion. Instructors and senior instructors who meet the qualifications for clinical faculty defined in D-9 b. may be considered for clinical faculty status upon the recommendation of the unit administrator and dean, subject to approval by the provost. Credit for prior equivalent experience may be granted by the provost up to a maximum of four years. Conversion of an existing tenure-track or tenure line in a unit to clinical status requires the approval of the dean and provost. A unit must demonstrate that a clinical position better advances the university’s strategic goals than a tenure-track position. [add. 7-11, ren. 7-14]
E. EMERITI. (FSH 1520 II-2)

E-1. ELIGIBILITY. A board appointed, benefit-eligible member of the university faculty who holds one of the ranks described in 1565 D and who leaves the university and has a minimum of 8 years of service, has attained 55 years of age, and attained the rule of 65 (age plus years of service is at least 65), is designated as “professor emeritus/emerita,” “research professor emeritus/emerita,” or “extension professor emeritus/emerita,” as applicable. A faculty member without such rank has the designation “emeritus” or “emerita,” as applicable, added to the administrative or service title held at the time of retirement. [ed. 7-00, 7-02, 1-08, rev. 7-12, 1-14]

In exceptional circumstances the provost, with the concurrence of Senate Chair, Vice Chair and Faculty Secretary, may suspend the above eligibility rules and award or deny emeritus status to a faculty member. [add. 1-12]

E-2. RIGHTS, PRIVILEGES, AND RESPONSIBILITIES. Emeriti are faculty members in every respect, except for the change in salary and in certain fringe benefits, the obligation to perform duties, and the right to vote in faculty meetings. They continue to have access to research, library, and other UI facilities. Emeriti may take an active role in the service and committee functions of their department, college, and the university. UI encourages the voluntary continued participation of emeriti in the activities of the academic community.

E-3. EMPLOYMENT OPPORTUNITIES. [add. 1-12]

   a. Emeritus faculty may hold a part-time position at the University of Idaho after retirement, but not a full-time one. When it is in the university’s interest, exceptions may be made and the full-time employment limitation may be waived by the president. [ed. 1-14]

   b. Units wanting to employ emeritus faculty without a search must request, in writing, a search waiver from the Director of Human Rights, Access & Inclusion.

   c. Search waivers granted to emeritus faculty remain in effect for three full years. Units need only notify Human Resources if they want to continue to employ an emeritus faculty member while the search waiver is in effect. However, a unit is not obligated to employ the emeritus faculty member during this three year period.

E-4. SPECIFIC PROVISIONS FOR EMERITUS PARTICIPATION. [ren. 7-12]

   a. Departmental mailboxes continue to be available to emeriti who reside locally.

   b. A list of emeriti and their mailing addresses is maintained at each level--department, college, and university (Human Resources). [ed. 7-06, 1-08]

   c. The director of human resources is responsible for supplying information about emeriti for the Campus Directory.

   d. Emeriti who have campus mailboxes receive University of Idaho publications by campus mail or upon request by email. [ed. 7-12]

   e. Emeriti who have departmental mailboxes receive full distribution of notices; otherwise, special requests may be made to the departmental administrator.

   f. Ordinary office materials and supplies are available under the same issuing procedures applicable to other members of the department.

   g. Departmental postage may be used for professional mail.

   h. Offices for emeriti are provided on a space-available basis.

   i. One, free non-transferable gold parking permit each year. [rev. 1-08]
j. Any discounts available to other members of the faculty and staff through various UI agencies are available to emeriti.

k. Emeriti are included in appropriate university, college, and departmental faculty-staff functions.

l. In the appointment of committees, administrators at all levels and the Committee on Committees consider the availability and desire for significant service of emeriti.

m. There are many areas of activity, professional and other, such as service to the community and special groups within the community and university, in which emeriti may have the time and the inclination to make contributions. In connection with such services, emeriti are not excluded from the travel budget, though they may generally have a lower priority.

n. Emeriti who elect to maintain an active computing account will retain access to services provided by Information Technology Services (ITS) including electronic communications (e.g. -- email, instant messaging, etc.), technical support, and offered software. [add. 7-99, ren.1-08, ed. 7-12, rev. 7-15]

E-5. LISTING OF EMERITI IN THE COMMENCEMENT PROGRAM. Names of faculty members who retire after meeting the eligibility requirements stated in E-1 are listed in the program of the commencement exercises held during the fiscal year in which their UI duties end; also, those whose service obligations are to end on or before August 31 following a given commencement will be listed in the program for that commencement. [ed. 1-10, ren. 7-12]

E-6. MAINTENANCE OF TIES WITH EMERITI. The Faculty Senate has urged UI units periodically to review their contacts with emeriti and to take steps to ensure that the provisions of this section--particularly b and c, above--are being carried out; moreover, the senate has urged all members of the UI community to seek additional ways of maintaining ties with emeriti and to provide opportunities and the means for them to continue to be a part of, and of service to, the university. [ed. 1-08, 7-09, ren. 7-12]

F. ASSOCIATED FACULTY: Associated faculty members (see FSH 1520 II-3) have access to the library and other UI facilities. Reimbursement for travel or for services to UI is at the unit’s discretion. They are not eligible for sabbatical leave. [ed. 1-10]

F-1. AFFILIATE FACULTY: [ren. 7-98, 1-08, rev. 7-10]

a. General. The affiliate faculty consists of professional personnel who serve academic departments in a supporting capacity. Appointment to affiliate-faculty status constitutes a recognition of the appointee’s scholarly contributions and professional accomplishments, confers responsibilities and privileges as stated in subsection d below, and authorizes assignment of service functions as described in subsection d-2 below. It is also a means of encouraging greater cooperation between and among academic departments and other units. An affiliate faculty member holds a non-tenure-track faculty status in an appropriate academic discipline. [ed. 7-00, 1-10, 12-16, rev. 7-10]

b. Employment Status. An affiliate faculty member may, by virtue of his or her employment, have either one of the following relationships with UI: (1) that of a UI employee, normally an exempt employee, who is [a] a member of the faculty or staff of a unit of the university other than the one in which he or she has affiliate-faculty status, or [b] a member of the professional support staff of the same unit of the university in which he or she has affiliate-faculty status; (2) that of an employee of a governmental or private agency who is assigned by that agency to a UI unit or to one of the agency’s units or programs that is officially associated with the university. [rev. 7-10]

c. Distinction between Affiliate and Adjunct Faculties. Members of the affiliate faculty have a more direct relationship with UI than do members of the adjunct faculty [see 1565 F-2]. Members of the adjunct faculty are not UI employees. An adjunct faculty member’s primary employment is with a unit or program that is not officially associated with UI. Thus, the relationship of a member of this faculty category to UI is essentially
that of a collaborator with a UI unit, program, or faculty member. An affiliate faculty member, in contrast, has a primary employment responsibility in a UI unit or in a non-UI unit that is officially associated with UI. In addition, he or she has a secondary relationship to another unit in a supporting role, or has a secondary relationship to the academic program in the same unit in which he or she has a primary employment responsibility. These latter relationships are the kind that are recognized by the affiliate faculty membership. [ed. 7-00, 1-08, 1-10, rev. 7-10]

d. Responsibilities, Privileges, and Rights. The guarantees afforded by the principle of academic freedom [see 3160] are extended to members of the affiliate faculty. They have substantially the same responsibilities and privileges as do members of the university faculty; however, their right to vote in meetings of their constituent faculties is limited in accordance with the provisions of 1520 II-3-b. (Those who, in addition to their affiliate-faculty status, have status as members of the university faculty [e.g., psychologists in the Counseling and Testing Center and regular faculty members in other academic departments] have, of course, full rights of participation in meetings of the university faculty and of the constituent faculties to which they belong.) [ren. 1-10, rev. 7-10, ed. 7-11]

Affiliate faculty members perform administrative, analytical, and research functions that complement UI’s mission in teaching, research, and service. [rev. 7-10]

1. Affiliate faculty members, as such, do not normally have teaching as a primary or major responsibility; however, with the approval of academic departments, they may teach classes, advise students on their academic or professional programs, participate in research projects, serve on graduate students’ supervisory committees (with approval by the dean of graduate studies), or act as expert advisers to faculty members or groups. [rev. 7-10, ed. 7-12]

2. The nature and extent of the services to be rendered are determined jointly by the affiliate faculty member, his or her immediate supervisor, and the departmental administrator(s) concerned. [rev. 7-10]

3. Affiliate faculty qualify for the faculty-staff educational privilege [see 3740] [ed. 1-10, rev. 7-10]

e. Qualifications. Assignment to an affiliate faculty position is based on demonstrating knowledge and experience, academic degrees, scholarly contributions, or other professional accomplishments comparable to what is expected of faculty within that unit. [ed. 7-00, rev. 1-10, 7-10]

f. Appointment.

1. Appointments to the affiliate faculty may be made at any time. They are reviewed by the dean of the college before publication of each issue of the General Catalog. No appointment should be continued unless the affiliate faculty member remains in UI employment or continues in his or her assignment to an entity that is officially associated with the university. [rev. 7-10]

2. A recommendation for appointment to the affiliate faculty normally originates in the appropriate academic department and requires the concurrence of the nominee’s immediate supervisor and the faculty of the appointing department. The appointment must be approved by the dean of the college, the president, and the regents. [rev. 7-10]

3. An appointment, termination, or other change in affiliate-faculty status is made official by means of a “Personnel Action” form. [rev. 7-10]

F-2. ADJUNCT FACULTY: [rev. 7-10]

a. General. The adjunct faculty includes highly qualified persons who are not employed by UI but are closely associated with its programs. [For the distinction between the affiliate and the adjunct faculty categories, see 1565 F-1-c.] [ed. 7-00, 1-08, rev. 7-10]
b. Responsibilities. Members of the adjunct faculty have the same academic freedom and responsibility as do members of the university faculty; however, their right to vote in meetings of the university faculty and of their constituent faculties is limited in accordance with the provisions of 1520 II-3-b. Adjunct faculty members may be assigned to advise students on their academic or professional programs at any level; to work in cooperative research projects; to serve on committees, including graduate students’ supervisory committees (with approval by the College of Graduate Studies); to act as expert advisers to faculty members or groups; and to teach courses in their branch of learning. [rev. & ren. 1-10, rev. 7-10, ed. 7-11, 7-12]

c. Qualifications. Adjunct faculty members must be highly qualified in their fields of specialization and should have exhibited positive interest in UI programs in the field of their appointment. Their qualifications should ordinarily be equivalent to those required of regular members of the faculty in the area and at the level of the adjunct faculty member’s responsibility. [ren. 1-10, rev. 7-10]

d. Adjunct faculty do not qualify for the faculty-staff educational privilege. (see 3740) [add. 1-10, rev. 7-10]

e. Appointment.

1. Appointments to the adjunct faculty may be made at any time. b. Appointments are for an indefinite period, but are to be reviewed by the dean of the college before publication of each issue of the General Catalog. No appointments should be continued unless the adjunct faculty member is actively engaged in the responsibilities for which he or she was appointed. [rev. 7-10]

2. Recommendations for appointment to the adjunct faculty are normally developed at the departmental level and have the concurrence of the departmental faculty. For interdisciplinary degree programs, adjunct faculty may also be assigned responsibilities with respect to the degree programs with approval of the program faculty and of the program director. Appointments must be approved by the dean of the college, the provost, the president, and the regents. [rev. 7-10]

3. Before formal appointment procedures are begun, the prospective adjunct faculty member must agree to serve under the provisions herein described. When necessary, the consent of the nominee’s employer, if any, will be requested and recorded. [rev. 7-10]

4. Appointment information is recorded on the regular “Personnel Action” form.

5. The appointment of adjunct faculty members to graduate students’ supervisory committees requires approval by the dean of the College of Graduate Studies. [rev. 7-10]

G. TEMPORARY FACULTY: Temporary faculty have access to the library and other UI facilities. Reimbursement for travel or for services to UI is at the unit’s discretion. They are not eligible for sabbatical leave. [add. 1-10]

G-1. LECTURER. A teaching title that may be used at any level, i.e., it carries no specific connotation of rank among the professorial titles. This title is conferred on one who has special capabilities or a special instructional role. Lecturers are neither tenurable nor expected to progress through the professorial ranks. A lecturer qualifies for faculty status with vote during any semester in which he or she (a) is on an appointment greater than half-time and (b) has been on such appointment for at least four semesters. When a lecturer qualifies for faculty status they shall be reviewed at a minimum of every 5 years thereafter as determined by the unit’s bylaws. The review committee defined by the unit’s bylaws shall include tenure-track faculty within the unit. [rev. 7-01, rev. 7-14]

G-2. VISITING FACULTY. A designation that, when used with a professorial title, customarily indicates that the appointee holds a regular teaching or research position at another institution. A visiting appointee who does not hold a professorial rank elsewhere may be designated as a lecturer. Appointees with visiting academic ranks (e.g., visiting associate professor, visiting professor) are considered temporary members of the university faculty. Those on full-time appointment have the privilege of voting in meetings of the university faculty and of the appropriate constituent faculties.
G-3. ACTING. Persons who are judged competent to perform particular duties may be appointed for temporary service as acting members of the faculty. An acting appointment may also be used to establish a probationary period for an initial appointment of a person who, while being considered for a regular position on the faculty, is completing the required credentials for a permanent appointment. Persons on acting status are not voting members of the university faculty or of constituent faculties.

G-4. ASSOCIATE. A title for a nonstudent with limited credentials who is assigned to a specialized teaching, research, or outreach position. Associates are exempt staff and are not members of the university faculty or of constituent faculties. [ed. 1-10]

H. NON-FACULTY: Those within this category are not members of the faculty. [ed. 1-10]

H-1. POSTDOCTORAL FELLOW. Postdoctoral fellows are persons who hold the doctoral degree or its equivalent at the time of their appointment and are continuing their career preparation by engaging in research or scholarly activity. Postdoctoral fellows are special exempt employees in the category of “temporary or special” (FSH 3080 D-2 a) employees recognized by the regents. [See also 3710 B-1.b.] [ed. 1-10]

H-2. GRADUATE STUDENT APPOINTEES: The general nature of the following graduate assistantships is defined as an apprenticeship experience that consists of a work obligation partnered with educational and developmental activities, all of which are integrated with the graduate degree program of the student. All graduate assistants must be individually mentored by a faculty advisor and may receive additional mentoring from other faculty and/or staff on or off campus. All graduate assistant positions (H-2. a, b, c) are limited to twenty hours per week of work. All graduate student appointees must be academically qualified and registered. [See also 3080 D-2-a.] [rev. 7-13, 7-18]

a. Graduate Teaching Assistant. Graduate Teaching Assistants perform duties related to the instructional efforts of the unit in which they are employed under the supervision of a member of the university faculty, associated faculty, or temporary faculty (see FSH 1565 D, F, and G). These duties, which must be associated with academic credit instruction and constitute at least 50 percent of a Graduate Teaching Assistant’s effort, may include, but not be limited to: primary teaching responsibilities; grading assignments; assisting with the delivery of instruction through technology; and providing other assistance related to instruction. [ed. 1-10, 7-18, rev. 7-13]

b. Graduate Research Assistant. Graduate Research Assistants develop competence in performing professional-level work in support of research, scholarship, or creative activity. These positions can only have duties within the scope of work permitted by the funding source. [ed. 1-10, 7-18, rev. 7-13]

c. Graduate Support Assistant. Graduate Support Assistants perform a wide range of duties and can have varying responsibilities in academic and non-academic campus departments and programs. The specific duties depend on the needs of the office or project and on the qualifications and experiences of the Graduate Support Assistant. Graduate Support Assistants may provide academic and/or non-academic instruction, and/or assist with research, or provide other support functions. The duties must be directly related to the Graduate Support Assistant’s program of study. The College of Graduate Studies shall periodically publish standards governing the permissible scope of Graduate Support Assistant appointments on its website. [add. 7-18]

I. QUALIFICATIONS OF NONFACULTY MEMBERS FOR TEACHING UI COURSES. Persons who are not members of the university faculty but are selected to teach UI courses offered for university-level credit (including continuing-education courses and those offered by correspondence study) are required to have scholarly and professional qualifications equivalent to those required of faculty members.
U OF I LIBRARY
BUDGET UPDATE
FACULTY SENATE
MARCH 2020
LIBRARY BUDGET OVERVIEW

Salaries (30-40%)
- Faculty
- Staff
- Students

Resources (50-65%)
- One-time purchases (e.g., print books, e-backfiles ~10-15%)
- Subscriptions (journals, databases, journal packages ~85-90%)

Other expenses (5-10%)
- Library systems and software, consortial fees, ILL, etc.
CHALLENGES

• Non-standard periodical inflation
• Subscriptions from other units passed to Library
• Structural issues with budget model
• Budget reductions

GUIDING PRINCIPLES

• Financial sustainability
• Proportional allocations comparable to peer institutions
• Anticipate changes in scholarly communication
# FY18 – FY21 EXPENDITURES

<table>
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<tr>
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<th>Faculty Librarians</th>
<th>Staff</th>
<th>Temporary Help</th>
<th>Total Salaries</th>
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<td><strong>FY18</strong></td>
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<td>$869,747</td>
<td>$206,633</td>
<td>$2,400,480</td>
<td>$4,660,284</td>
<td>$308,312</td>
<td>$7,369,076</td>
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<td><strong>FY19</strong></td>
<td>$1,118,180</td>
<td>$875,269</td>
<td>$157,546</td>
<td>$2,150,968</td>
<td>$4,694,316</td>
<td>$431,753</td>
<td>$7,277,037</td>
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<td><strong>FY20</strong></td>
<td>$1,083,711</td>
<td>$800,000</td>
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<td>$2,100,000</td>
<td>$3,750,000</td>
<td>$400,000</td>
<td>$6,274,000</td>
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<tr>
<td>estimate)</td>
<td></td>
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<tr>
<td><strong>FY21</strong></td>
<td>$1,150,000</td>
<td>$750,000</td>
<td>$150,000</td>
<td>$2,050,000</td>
<td>$3,200,000</td>
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<td>$5,650,000</td>
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<tr>
<td>estimate)</td>
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<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Peer institutions*</td>
<td>Headcount</td>
<td>Budget per headcount</td>
<td>Total budget</td>
<td>Total salaries</td>
<td>salary per headcount</td>
<td>salaries % of total</td>
<td>Total materials</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------</td>
<td>---------------------</td>
<td>--------------</td>
<td>----------------</td>
<td>---------------------</td>
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<td>----------------</td>
</tr>
<tr>
<td>Kansas State University</td>
<td>22,343</td>
<td>$639</td>
<td>$14,288,123</td>
<td>$7,085,845</td>
<td>$317</td>
<td>49.59%</td>
<td>$5,780,615</td>
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<tr>
<td>Washington State University</td>
<td>30,614</td>
<td>$454</td>
<td>$13,899,567</td>
<td>$6,150,778</td>
<td>$201</td>
<td>44.25%</td>
<td>$6,929,277</td>
</tr>
<tr>
<td>University of Arkansas - Fayetteville</td>
<td>27,558</td>
<td>$562</td>
<td>$15,482,451</td>
<td>$6,848,552</td>
<td>$249</td>
<td>44.23%</td>
<td>$7,044,281</td>
</tr>
<tr>
<td>University of Nebraska - Lincoln</td>
<td>26,087</td>
<td>$673</td>
<td>$17,543,752</td>
<td>$7,726,880</td>
<td>$296</td>
<td>44.04%</td>
<td>$8,210,691</td>
</tr>
<tr>
<td>New Mexico State University - Main Campus</td>
<td>14,432</td>
<td>$428</td>
<td>$6,177,418</td>
<td>$2,704,695</td>
<td>$187</td>
<td>43.78%</td>
<td>$2,962,974</td>
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<tr>
<td>Virginia Tech</td>
<td>34,440</td>
<td>$697</td>
<td>$24,015,933</td>
<td>$9,919,048</td>
<td>$288</td>
<td>41.30%</td>
<td>$10,209,711</td>
</tr>
<tr>
<td>University of New Hampshire</td>
<td>15,644</td>
<td>$712</td>
<td>$11,143,526</td>
<td>$4,508,356</td>
<td>$288</td>
<td>40.46%</td>
<td>$5,949,922</td>
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<tr>
<td>Utah State University</td>
<td>27,679</td>
<td>$362</td>
<td>$10,006,906</td>
<td>$4,007,230</td>
<td>$145</td>
<td>40.04%</td>
<td>$5,486,736</td>
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<tr>
<td>Oregon State University</td>
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<td>$4,991,175</td>
<td>$156</td>
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<td>$5,780,510</td>
</tr>
<tr>
<td>Michigan State University</td>
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<td>$733</td>
<td>$36,668,781</td>
<td>$14,019,612</td>
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<td>38.23%</td>
<td>$18,838,903</td>
</tr>
<tr>
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<td>$597</td>
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<td>34.16%</td>
<td>$11,945,388</td>
</tr>
<tr>
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<td>$539</td>
<td>$9,008,281</td>
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<td>$175</td>
<td>32.45%</td>
<td>$5,770,550</td>
</tr>
<tr>
<td>North Dakota State University</td>
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<td>$5,615,045</td>
<td>$1,807,260</td>
<td>$126</td>
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<td>$3,490,862</td>
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<td>$1,103</td>
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<td>20.86%</td>
<td>$8,973,245</td>
</tr>
<tr>
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<td>25,727</td>
<td>$592</td>
<td>$15,114,139</td>
<td>$5,920,697</td>
<td>$230</td>
<td>38.95%</td>
<td>$7,669,548</td>
</tr>
<tr>
<td>University of Idaho FY18</td>
<td>12,545</td>
<td>$587</td>
<td>$7,369,076</td>
<td>$2,400,480</td>
<td>$191</td>
<td>32.58%</td>
<td>$4,660,284</td>
</tr>
<tr>
<td>University of Idaho (target FY21)</td>
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<td>$450</td>
<td>$5,649,563</td>
<td>$2,050,000</td>
<td>$163</td>
<td>36.29%</td>
<td>$3,200,000</td>
</tr>
<tr>
<td></td>
<td>Total Library Budget per Headcount</td>
<td>Library Salary Expenditures per Headcount</td>
<td>% of total (salaries)</td>
<td>Library Materials Expenditures Per Headcount</td>
<td>% of total (materials)</td>
<td>Other Library Expenditures Per Headcount</td>
<td>% of total (other expenditures)</td>
</tr>
<tr>
<td>--------------------------------</td>
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<td>------------------------</td>
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</tr>
<tr>
<td>Peer Average</td>
<td>$592</td>
<td>$230</td>
<td>38.95%</td>
<td>$298</td>
<td>51.86%</td>
<td>$59</td>
<td>10.08%</td>
</tr>
<tr>
<td>University of Idaho FY18</td>
<td>$587</td>
<td>$191</td>
<td>32.58%</td>
<td>$371</td>
<td>63.24%</td>
<td>$25</td>
<td>4.18%</td>
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<tr>
<td>University of Idaho FY21 (target)</td>
<td>$450</td>
<td>$163</td>
<td>36.29%</td>
<td>$255</td>
<td>56.64%</td>
<td>$32</td>
<td>7.07%</td>
</tr>
</tbody>
</table>
MOVING FORWARD

• Continuous two-way communication with campus on cancellations
  • Spring ‘19 Journal and Database Review
  • Elsevier ScienceDirect communications
  • Librarian outreach to individual departments
• Cut deep and then rebuild as possible based on input and data
• Enhance interlibrary loan
• Prioritize efforts to be part of the transformation of scholarly communication (e.g., open access, open source software, open educational resources)