University of Idaho
2019 – 2020 Faculty Senate Agenda

Meeting #24

Tuesday, March 24, 2020 at 3:30 pm
Zoom Only

I. Call to Order

II. Approval of Minutes (Vote)
   • Minutes of the 2019-2020 Faculty Senate Meeting #23 (March 10, 2020) Attach. #1

III. Chair’s Report

IV. Provost’s Report

V. Committee Reports
   • University Curriculum Committee (Vote) – Jerry McMurtry, COGS Dean
     UCC-20-62a – Masters’ Degree Credits – Attach. #2
     UCC-20-62b – Doctoral Degree Requirements – Attach. #3
     UCC-20-62c – Non-Degree Requirements – Attach. #4

VI. Other Announcements and Communications
   • OPEB discussion and vote – Brian Foisy, VP of Finance – Attach. #5
   • Budget Discussion – Brian Foisy, VP of Finance – Attach. #6

VII. Special Orders

VIII. New Business

IX. Adjournment

Attachments:

• Attach. #1 Minutes of the 2019-2020 Faculty Senate Meeting #23 (March 10, 2020)
• Attach. #2 UCC-20-62a – Masters’ Degree Credits
• Attach. #3 UCC-20-62b – Doctoral Degree Requirements
• Attach. #4 UCC-20-62c – Non-Degree Requirements
• Attach. #5 OPEB Document
• Attach. #6 Budget Handout
University of Idaho

2019 – 2020 Faculty Senate – Pending Approval

Meeting # 23

Tuesday, March 10, 2020 at 3:30 pm
Paul Joyce Faculty- Staff Lounge & Zoom

Present: Bridges, Caplan, Chapman, Chopin, Cosens, DeAngelis, Dezzani, Fairley, Grieb (Chair), Hanigan, Hill, Jeffery, Keim, Kirchmeier (Vice-Chair), Lee-Painter, Meeuf, Paul, Raja, Rashed, Sammarruca (w/o vote), Schwarzlaender, A. Smith, R. Smith, Tibbals, Wienczek (w/o vote)
Present via Zoom: Kern, McKellar, Tenuto
Absent: Carter, Hanigan, Raja
Guests and Observers: 12
Guest Speaker: Brandi Terwilliger, Brian Foisy, Sara Mahuron

Call to Order: Chair Grieb called the meeting to order at 3:31 pm.

Approval of Minutes (vote):
There was a motion (Dezzani/Tibbals) to approve the minutes of the 2019-2020 Faculty Senate Meeting #22 (March 3, 2020). Friendly amendment by Secretary Sammarruca: Senator Tibbals attended the meeting but was not listed as “Present” in the records. The motion to approve the minutes with the friendly amendment carried unanimously.

Consent Agenda: None.

Chair’s Report:

- Carlos Vazquez was welcomed as the new member of the support services team. He is an Organizational Sciences major and previous Vice President of ASUI.
- Welcome to Arash Rashed, Associate Professor of Ecological Entomology who joins us as a new Faculty Senator.
- A reminder that sabbatical applications for the 2021-2022 academic year are due March 31st. Submit completed applications to provost@uidaho.edu.
- Chair Grieb is still gathering questions for the Provost regarding Academic Affairs budget. He will coordinate those and send them to the Provost tomorrow afternoon.
- From Cassidy Hall in the Doceo Center. In response to demand, the Doceo Center has added two more Zoom trainings this semester. All training dates and registration links are listed below:
  - Monday, March 9, 11:30 to 12:20 - Zoom for Teaching & Office Hours. See details and register at: https://www.webpages.uidaho.edu/cetl/workshops/Details.asp?618
  - Tuesday, March 17, 11:30 to 12:20 - Zoom for Teaching & Office Hours. See details and register at: https://www.webpages.uidaho.edu/cetl/workshops/Details.asp?623
  - Tuesday, March 24, 11:30 to 12:20 - Zoom for Effective Meetings. See details and register at: https://www.webpages.uidaho.edu/cetl/workshops/Details.asp?624
  - Monday, March 30, 11:30 to 12:20 - Zoom for Effective Meetings. See details and register at: https://www.webpages.uidaho.edu/cetl/workshops/Details.asp?619
• Update on the Vandal Gateway Program (VGP) and admission policy. The Temporary Emergency Policy is now enacted and will allow matriculation of the 2020 VGP cohort. A new admission policy, to be included in the 2021-22 Catalog, has to be in place in order to admit subsequent cohorts. Plans will proceed with input from various people/groups, such as the Admissions Committee, CETL, the deans, and Vice Provosts for academic programs. Later in the semester, a proposal will be presented to the University Curriculum Committee and then to the Senate. The discussion will resume after Spring Break.

• Vice Provost Torrey Lawrence was invited by Chair Grieb to deliver an update on the COVID-19 situation. The Infectious Disease Response Team sub-groups are preparing for various scenarios and just met with the President about plans. For this week, campus operations will continue according to their normal course. On Monday and Tuesday after Spring Break, March 23 and 24, all classes will be offered only online, as a “test run” and an opportunity for everyone to experiment with online/remote/distance delivery. On Thursday, March 19th, a communication will go out to inform whether the online mode will continue past the 24th. CETL is offering additional training online as well as recordings of those training sessions. ITS is making sure their system is ready for increased traffic. The university has been in contact with WSU, ISU, and BSU to coordinate plans. They are handling questions as they come, in a fast-changing situation. The primary concern is health, while at the same time trying to minimize campus disruption.

Discussion:
Clarifications were asked as to whether, for the first two days after Spring break, students will be explicitly instructed not to come to class or whether they will have the option to come. Provost Wiencek and Vice Provost Lawrence answered that students will not have the option to attend classes in person. More will be known after the communication of Thursday March 19th. As for laboratory classes, faculty are encouraged to be creative in the way they deliver the instruction. The university is not dictating a particular way (such as, for instance, Zoom). Instructors should decide what works best for them and their students (Zoom, recorded lectures, or other ways). With regard to recorded lectures, the Provost reminded everyone that a recorded lecture that identifies a particular student is in violation of FERPA. In response to a concern, Vice Provost Lawrence said that Zoom is expecting heavy traffic and the company believes that they are able to handle it.

A Senator asked whether instructors will have access to their classrooms when delivering online. Vice Provost Lawrence replied that they will, although this will be clarified before next week’s communication. Students can be asked to meet online during the normal lecture time while instructors hold lecture from their offices or another location. The question was raised of how to protect the integrity of quizzes and tests. Vice Provost Lawrence recognized that this is another challenge of delivering online, and an aspect where instructors need to be creative. Blackboard may offer the best options.

There are serious concerns about students who do not have access to technology at home. Vice Provost Lawrence said that ITS is working to address this problem. About 100 computers may be made available to be checked out by students who do not have access to technology. Chair Grieb said he advised his students to go where they can have the best access to broadband.

Public spaces (dorms, dining halls, etc..) will remain open, although the situation can change between now and March 23rd. At this time the intent is to have those areas operate as usual. Everyone should follow CDC guidelines, such as washing their hands often. People should self-
monitor and use their best judgement when choosing to congregate or not. People are strongly encouraged to stay home if they are sick.

Students will be informed during the break whether they should stay at home a few extra days. The university is definitely going to go to online mode on Monday and Tuesday after the break, but it may be longer. March 19th is a key date to look for communications.

A Senator asked whether students are required to stay away from campus for 1-2 weeks, which is the typical virus incubation period. The Provost noted that students are not being told to stay away, but they can if they so choose.

A Senator asked whether the next Faculty Senate meeting will be via Zoom. Chair Grieb answered that he will be in the Faculty-Staff Lounge as usual but Zoom will be available to anyone who wishes to use that option.

Please click here for more about COVID-19.

Provost’s Report:

- The Provost thanked Vice provost Lawrence for being proactive and keeping ahead of the issues. He asked for everyone’s support while we get through this challenge.
- Update on deans’ searches. Dennis Becker, Professor of natural resource policy, was just named Dean of CNR. An announcement for CLASS is forthcoming. Interviews of three finalists will take place after Spring Break for the College of Arts and Architecture. Mark Chopin is the chair for that search. The College of Law has a different timeline: they build a pool during the spring and the summer and hold interviews in the Fall.
- Dean Ali Carr-Chellman will be leaving at the end of this academic year to take a position at the University of Dayton, in Ohio. She will be missed and the Provost wished her all the best.
- Today the College of Business and Economics had a good accreditation visit. The Provost heard strong positive words about the experiential learning opportunities in the college. Dean Chopin noted that, although nothing is official yet, it seems likely that it will be good news. Faculty, staff, alumni, came together and did great teamwork, even though the visit happened at a difficult time. He emphasized that obtaining accreditation for the college and for the accounting program is a significant achievement, as there are relatively few similarly accredited programs worldwide.
- Brief update on APPT. We will follow policy and procedures, but program closure is a presidential prerogative. Although it has been a practice for Senate to play an advisory role, our Constitution speaks of program closure as a presidential decision and does not require that Senate play a formal role. After the President’s decisions are made (informed by the current processes and IPEC), UCC will be involved working with the Registrar’s on implementing the necessary Catalog changes. Provost Wieczek suggested that, within their next year agenda, Senate could discuss ways in which Senate could provide input on proposed program closures.

There were no questions for the Provost.

Committee Reports: None

Other Announcements and Communications:
- APM and FSH non-voting Items – Brandi Terwilliger
• APM 50.04 Verifying Employment Eligibility for New Employees.
  These updates are necessary to comply with federal law and the current process. There were no
  questions or comments.
• APM 50.55 Writing UI Job Descriptions.
  This revision is an update to be consistent with current process and language for how to best
  write a job description. There were no questions or comments.
• APM 55.39 Retiree Benefits.
  These updates are made to reflect the correct benefit offerings. Dental coverage for retirees is
  removed. There were no questions or comments.
• APM 50.53 Temp Hourly Employment.
• FSH 3090 Temp Hourly Employment.
  These items are related. The updates reflect changes based on streamlined recruitment
  processes and to ensure compliance with state policies. There were no questions or comments.

• Campus Labs course evaluation software update – Sara Mahuron
  The main issue is when to make the transition from the old system to the new one, Campus Labs.
  Sara Mahuron noted that this is just a change in how the data are collected, not the substance of
  the actual evaluation process. Sara Mahuron reviewed the old and the new systems side by side.
  She explained that the old system is not sustainable, and that Campus Labs has more flexibility and
  is ready to function. It will provide a streamlined process to regroup, compare, and export data.
  Attachment #8 in the Faculty Senate meeting binder provides details on the system.

Discussion:
This change will not impact faculty or students in any fundamental way. Essentially, after the
migration, one would log into Vandalweb and be redirected to Campus Lab. There was a general
consensus that migrating earlier rather than later would be a good idea. Sara Mahuron invited the
Senators to email her with any questions or if they need support.

A Senator noted that this change does not address the problem of low-response rate in course
evaluations often seen by instructors. Chair Grieb recommended to take the last 15 minutes of the
last lecture to have students who haven’t already done it fill the evaluation form in class on their
laptops or mobile devices.

• Facilities Outsourcing Committee Report – Russ Meeuf
  Senator Russ Meeuf started his presentation, included as Attachment #9 in the Faculty Senate
  meeting binder. The Facility Outsourcing Committee had a healthy debate. First, they discussed
  outsourcing as a strategy in general. That is, they debated whether outsourcing can successfully and
  quickly address some of the current budget challenges. The committee considered the pros and
  cons of outsourcing as a strategy. On the “pros” side: it was recognized that larger entities may be
  able to get better deals, through renegotiations of vendor contracts with a larger national identity;
  outside expertise can be healthy. On the “cons” side: the steep learning curve associated with
  bringing in outsiders; also, the opportunity for finding new efficiencies seems narrow in scope.
  Overall, the committee voted 4 to 2 in favor of outsourcing as a strategy.

Next, the committee discussed specifically Advanced Facility Services (AFS) as a partner. AFS
submitted a management-only proposal with the option to transition into full outsourcing. Russ
Meeuf noted that the AFS public presentation was not a good one. The presentation was not
sufficiently specific and lacked important details. Facilities employees who attended the presentation were not impressed.

At this point, Chair Grieb invited Staff Council Chair and Vice-Chair, Chad Neilson and Cari Espenschade, to provide comments. Chad Neilson recognized that this is not an easy discussion. On the one hand, he said, we care about the people in facilities; on the other, we are facing budget problems. Outsourcing is a mechanism that, in the end, may save money and thus protect jobs. There are advantages and risks “on both sides”. He supports the outsourcing of facilities.

Discussion:
The discussion focused on how savings could be generated over time. As UI employees leave voluntarily, they would be replaced by staff hired by AFS, with benefit packages lower than those offered at UI. The lower packages were perceived as a concern by some senators with regard to the possibility of recruiting and retaining qualified people. Also, the loss of knowledge and expertise from long-time UI employees with vast experience (for instance, with specialized lab equipment) was seen as a potential problem.

Russ Meeuf noted that the committee received 25 pages of feedback from facilities employees, covering a wide spectrum of opinions. One concern was that there is no strong indication that outsourcing will actually save money. Other employees felt it is disrespectful to bring outsiders while they would be happy to use their broad experience to help tackle the budget challenges.

Vice President Brian Foisy joined the discussion and commended Senator Meeuf for his objectivity through the committee work. He agreed that the AFS presentation was not strong. He had previous interaction with the firm, when he hired them in North Dakota to do facilities work and had a very positive experience. Thus, he had high hopes and was disappointed. There were 140-150 people in the room, 30 of whom provided comments. Of those comments, 7 were neutral or positive and 23 were negative. The low number of responses is an aspect to consider. After the presentation, employees had the opportunity to talk to AFS representatives, which indicates a level of interest on the part of AFS.

Vice President Foisy emphasized that, no matter what happens moving forward, not a single UI facilities employee would be fired. They all would keep their jobs, benefits, and access to education. The main change for them would be that they would have a new “boss”. He prepared a pro forma to project the savings which might be realized over a hypothetical 6-year period, and determined a projected saving of $623,000, which can protect 15 positions in the future. This is an opportunity, he continued, to get off the circular pattern (“hamster’s wheel”) of budget cuts leading to cutting positions, which in turn leads to having to lay off employees, ultimately resulting in diminished service level and so on. Vice President Foisy noted that this is one of the few opportunities to get away from this pattern and cut base budget with no service level reduction. He also mentioned that the AFS CEO, during his campus visit about 18 months earlier, had shown a valuable outside perspective.

Chair Grieb noted that FSL had met with President Green just the day before and were informed that there will be a website to provide input on this matter. Collecting input will provide more information on how people feel about retention issues, impact of turnover on morale, etc...
Concerns about loss of knowledge and experience were reiterated. Russ Meeuf thought that the six-year projection reported by Vice President Foisy may be based on incomplete information. There is no compelling data to support the expectation of long-term savings and, therefore, partnership with AFS is a risky choice. The focus moved again on the (reduced) benefit package that AFS would provide to new employees. A few Senators asked that issue to be clarified. Brian Foisy explained that there is (about) a 10% differential between the AFS total compensation package and the one from UI. He added that these are average figures which were given without specific details and which we would need to explore further with the vendor. Without some differential, Vice President Foisy continued, there cannot be any real savings. As for pension plan and health insurance: AFS does not offer a pension plan, just 401(k) matching, and the health insurance coverage would be less than what UI employees are offered. For instance, UI provides OEA benefits. The health insurance package would not be as robust. AFS employees would have a compensation package more like the one that Sodexo offers.

Senator Meeuf reiterated that the AFS presentation showed lack of preparation, which gives reasons to be concerned. Another Senator noted that having received five proposals (none of which met the initial goal of immediate budget reduction) is worrisome. What if AFS does not find qualified personnel because they do not offer competitive packages? (This question was echoed by another Senator.) The same Senator asked how UI compares with peer institutions in terms of infrastructure expenses. Brian Foisy said we are below, with $3.5 per square foot as compared to the average $5 per square foot.

Brian Foisy argued that AFS had been around about 10 years and he trusts them to deliver what they promise, although he was disappointed with their presentation. Vice President Foisy agreed that it is possible we could experience increased problems with retention due to the lower compensation packages. On the other hand, he reiterated, reduced costs mean maintaining positions instead of eliminating them and continue to stay on the “hamster’s wheel”.

Provost Wiencek noted that, especially due to the low staff compensation packages, we may feel an impact from the turnover, but he is confident that in the end we will make a significant amount of progress. Brian Foisy observed that some employees prefer higher salaries and lower benefits, as he learned talking to AFS representatives. Instead, we don’t have that option, because we have a fixed benefit package for everybody. Thus, one may decide to focus on the hourly pay rather than benefits. He is confident that AFS would exercise the necessary flexibility to ensure successful recruiting and retention. This is one of the possibilities that was mentioned in the AFS presentation, namely, to increase hourly pay, if that is what employees prefer. AFS business model is not the one of a much larger corporation, but they have been in business long enough to deliver what they say they can do. A Senator suggested that AFS may be invited again to give another and better prepared presentation.

Senate will not meet on Tuesday, March 17th because of Spring Break. We will reconvene in two weeks, on March 24th.

**New Business:** None

**Adjournment:** A motion to adjourn (Dezzani/Schwarzaender) passed unanimously. The meeting was adjourned at 5:07 pm.
Respectfully Submitted,

Francesca Sammarruca
Secretary of the University Faculty & Secretary to Faculty Senate
Master's Degrees

Credits

All master's degree programs require a minimum of 30 credits. Some master's degree programs may require more. Additional work may be stipulated in individual cases to meet particular objectives or need for additional background. Courses used toward an undergraduate degree, professional development courses, or courses on a professional development transcript are not available to be used toward a graduate degree.

No more than three credits of workshop or workshop equivalent courses may be used toward the graduate degree.

Credit in course 500 (Master's Research and Thesis) or 600 (Dissertation) cannot be counted toward a non-thesis master's degree. Although no limit is imposed on the number of credits that may be earned in course 500 for degrees with thesis, only a maximum of 10 credits in course 500 in the major of the degree can be used to fulfill master's degree requirements (a lower limit may be set by the program). Up to five-six credits of course 599 (Non-thesis Research) are allowed to count towards a non-thesis master's degree; however, if a thesis option exists for the program, no more credits of course 599 are allowed toward the non-thesis master's degree than half the number of credits allowed for course 500 toward the program's master's degree.
Doctoral Degrees

Requirements for Doctoral Degrees

Credit Requirements

For the Ph.D. and Ed.D., a minimum of 78 credits beyond the bachelor's degree is required; of these, at least 52 credits must be at the 500 level or above and at least 33 of the 78 credits must be in courses other than 600 (Doctoral Research and Dissertation). A maximum of 45 credits in 600 (Doctoral Research and Dissertation) and 5, including 6 credits of 599 (Non-thesis Research) or 500 (Master's Research and Thesis) may be used toward the degree. For the D.A.T., a minimum of 66 credits are required (including all dissertation work), and follow a prescribed set of courses set by the program.

Courses numbered below 300 may not be used to fulfill the requirements for a doctoral degree; courses numbered 300-399 may be used only in supporting areas and are not to be used to make up deficiencies. Individual programs may require additional course work. Applicants having a doctoral degree may obtain a second doctoral degree subject to the approval of the Graduate Council. The Graduate Council will establish the requirements for the second degree.
1. Add the following language to the catalog at the end of the College of Graduate Studies – Overview section:

**Non-degree Enrollment in the College of Graduate Studies**

A non-degree student may register for graduate level courses if they have earned an undergraduate or graduate degree with a cumulative grade point average of 3.00 or higher. Students desiring to register in graduate level courses should send a copy of their transcript showing degree date and GPA to the College of Graduate Studies (cogs-forms@uidaho.edu) to have the block on 500-level courses removed. Students desiring to have graduate level courses taken as a non-degree student placed on a graduate transcript must follow the policies on reserving courses for the graduate transcript.

**Reserving Non-Degree Courses for the Graduate Transcript**

Students desiring to move courses from their non-degree transcript to a graduate transcript may do so by filing the Credit Reservation Form with the College of Graduate Studies. Courses from the non-degree record may be moved to a graduate transcript if they meet the following criteria: 1) the student has a cumulative GPA of 3.00 or greater; 2) the course is at the 400 level or higher; 3) the grade in the course is A, B or Pass. No more than 12 credits of non-degree work can be moved to the graduate transcript under this policy. The combined total of transfer credits, correspondence credits, non-degree credits, credits moved from an undergraduate transcript that were not used toward an undergraduate degree, and approved credits more than eight years old at the time the degree is awarded shall not exceed 12 credits for master's programs designated as requiring 36 or fewer credits, and shall not exceed one-third of the total credits in designated programs requiring more than 36 credits.

Students are responsible to initiate the course reservation process as soon as they enter a graduate program. Courses will not be reserved until final grades for the term have been posted. All courses placed on the graduate transcript, regardless of course level, will be assessed graduate fees.
March 9, 2020

To: Francesca Sammarruca, Faculty Secretary
Terrance Grieb, Faculty Senate Chair

From: C. Scott Green, President

Subject: Other Post Employment Benefits (OPEB) Proposal

The purpose of this communication is to outline retiree benefit changes recommended by the OPEB Advisory Group. The group was tasked with identifying ways to meet our State Board of Education reserve requirements while still taking into consideration the needs of our employees and retirees. To summarize the recommendations:

1. Tier I benefits remain unchanged.
2. Pre-Medicare benefits remain unchanged for Tiers II and III.
3. Post-Medicare benefits remain unchanged for Tiers II and III for those already retired or eligible to retire by Jan. 1, 2021.
4. Post-Medicare benefits will be phased out by the end of 2023 for those in Tier II and III not eligible to retire by Jan. 1, 2021.
5. Pre-Medicare benefits remain unchanged for all Tier IV.
8. Tier IV will be closed for employees hired after June 30, 2020.

We solicited feedback from across the university, including Faculty Senate, Staff Council, UIRA Board, Distinguished Professors, President’s Cabinet, Deans and Center Executive Officers. The feedback was largely supporting of the OPEB Advisory Group recommendations. It is worth noting the OPEB Advisory Group recommendations are in line with the benefits offered by nearly all of our 16 peer institutions, based on analysis by our health plan actuary.

Based on the most recent OPEB census data (12/31/2018), there were 520 Tier III current employees not eligible to retire before 1/1/2021. All Tier II employees will be eligible to retire by that point and thus will not be impacted.

We anticipate a reduction in the University’s OPEB liability of approximately $11 million from implementation of these changes. These changes will also, in coming years after implementation, reduce the University’s expenses associated with the benefits program.

Based on this, I am proposing policy revisions to align with the OPEB Advisory Group recommendations as described above. The proposed changes (which will be submitted to the Faculty Senate) are consistent with the changes outlined in my memo of January 24, 2020 to the Faculty Senate, Staff Council, UIRA Board and UI Distinguished Professors. I am asking the Faculty Senate to consider the specific policy changes which implement the OPEB Advisory Group recommendations. Implementation of these changes within the 19-20 fiscal year will be an immediate material benefit to the University’s financial position.
# POLICY COVER SHEET

(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy) [3/09]

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<th>Faculty/Staff Handbook [FSH]</th>
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All policies must be reviewed, approved and returned by a policy sponsor, with a cover sheet attached to apm@uidaho.edu or fsh@uidaho.edu respectively.

*Note: If revision/deletion request original document from apm@uidaho.edu or fsh@uidaho.edu, all changes must be made using "track changes."

**Originator(s):**

(Please see FSH 1460 C)

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Reviewed by General Counsel X Yes No Name & Date: Kent Nelson, March 10, 2020

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

Update policy to reflect changes to the retiree health benefits as recommended by the OPEB Advisory Group.

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

These changes reduce the unfunded OPEB liability by approximately $11 million.

III. **Related Policies/Procedures:** Describe other policies or procedures existing that are related or similar to this proposed change.

NA

IV. **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. ASAP

If not a minor amendment forward to:

- Policy Coordinator
- [Office Use Only]

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

- [Office Use Only]

- Track #: __________________________
- Date Rec.: ________________________
- Posted: t-sheet: h/c _________
- web: _________
- Register: ________________________
- (Office Use Only)
PREAMBLE. This section was an original part of the 1979 Handbook, was changed in July of 1994 to add the optional retirement plan, and most recently changes were made in 2007 to the eligibility criteria and benefits available through the University of Idaho. The January 2008 version updated and supersedes all prior versions. In July 2015 updates were made due to Health Care Reform and in July 2019 changes were again made to comply with the retiree settlement.

The benefits and programs described in this section are governed by applicable laws and plan documents and are subject to change at any time. In the event of a conflict between this policy and the applicable law or plan document, the law or plan document will control. Employees contemplating retirement should make an appointment with a Benefit Services Specialist to verify eligibility and discuss benefits and options for retirement.

Further information regarding retirement is available from Human Resources, Benefit Services [www.uidaho.edu/benefits (208-885-3697)]. [ed. 7-97, 7-02, 9-06, 12-06, 7-15, rev. 7-07]

CONTENTS:

A. Introduction
B. State and Federal Retirement Plans
C. University of Idaho Privileges and Programs
D. Disability Retirement
E. Surviving Spouse and Children

A-1. State and Federal Retirement Plans. These include state and federal retirement plans such as the Public Employees Retirement System of Idaho (PERSI), the Idaho Optional Retirement Plan (IORP), the Civil Service Retirement System and the Federal Employees Retirement System. Eligibility criteria and benefits are determined under each plan and can be found in the respective plan documents, which are subject to change. In the event of a conflict between this policy and the plan documents, the plan documents control in all respects.

A-2. University of Idaho Retirement Privileges and Programs. These include faculty emeritus and honored staff retiree privileges, eligibility to participate in retiree health programs of the University of Idaho (Retiree Health Program).
A-2-a. Emeritus Faculty and Honored Staff Retiree Privileges. This policy sets forth the eligibility criteria for, and benefits of, honored staff retiree privileges. For faculty emeritus privileges, see FSH 1565 E. Emeritus or honored staff retiree status does not automatically confer eligibility for the Retiree Health Program. [ed. 6-09]

A-2-b. Retiree Health Program. This policy sets forth eligibility criteria for the Retiree Health Program. Information regarding specific benefits is contained in the applicable plan documents and may change. In the event of a conflict between the information in the Plan documents and those presented in this policy, the plan documents will control.

B. STATE AND FEDERAL RETIREMENT PLANS. University of Idaho employees participate in the following plans, depending on eligibility. Employee contributions are made to PERSI, IORP, the Civil Service Retirement System and the Federal Employees Retirement System through payroll deduction. The University of Idaho contributes a portion of salary and the employee contributes a portion of salary. These amounts vary from year to year. Current contribution rates are available at http://www.uidaho.edu/benefits under the "Retirement Plans" menu option. Contributions are suspended while an employee is on leave without pay, except that IORP contributions may be continued by the plan during a qualified disability if a waiver is requested and approved. [ed.7-15]

B-1. Public Employees Retirement System of Idaho (PERSI). PERSI is a defined benefit retirement plan. Eligibility requirements and benefits are governed by the PERSI plan document, which is available at www.persi.idaho.gov. Employees also may contact the plan administrator listed below. The contact information can be found on the Benefits website: [ed. 7-15]

PERSI
Public Employee Retirement System of Idaho

B-2. Idaho Optional Retirement Plan (IORP). IORP is a defined contribution retirement plan. There are currently two plan administrator choices for employees: The contracts for plan administrators are managed through the Board of Regents. For information on the plan offerings visit the benefit webpage. Eligible employees must enroll and select a Plan administrator and self-directed investments when they become eligible. In the event that a Plan administrator and/or investment options are not elected by the employee before contributions begin, default elections and/or investments will be selected. Employee and employer contributions will be directed to the default Plan administrator and deposited within default investment choices, unless or until these have been changed by the employee. Eligibility requirements and benefits are governed by the IORP plan document. For more information, contact the plan administrator. The contact information for each can be found on the benefits website. [ed. 7-15, 7-19]

B-3. Federal Retirement Plans. Certain grandfathered University of Idaho employees are eligible for benefits governed by the Federal Employees Retirement System. For complete information, go to www.opm.gov/retire. For assistance, contact Benefit Services at the University of Idaho. [rev. 7-19]
C. UNIVERSITY OF IDAHO RETIREMENT PRIVILEGES AND PROGRAMS.

C-1. Definitions.

C-1-a. Retirement. An employee may bring about the termination of his or her employment by resigning [see 3930 A and 3940]. Resignation is considered to be “retirement” if the employee has qualified for certain benefits based on age and length of qualified service (defined below). The effective date of retirement shall coincide with the last work day in a calendar month or last work day of a fiscal year. The last day of employment is generally the last day worked [see FSH 3710 B-9]. A discussion with benefit services regarding the anticipated specific date of retirement will help facilitate the transition of appropriate benefits and privileges in a seamless manner. [rev. 7-19]

C-1-b. Retiree. A retiree is a former employee who has terminated his or her employment through retirement.

C-1-c. Qualified Service. For purposes of determining retiree health program eligibility, qualified service includes service while employed at the University of Idaho in a position eligible for University of Idaho health benefits, excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not eligible under the University’s criteria for University subsidized health benefits. Service to the University of Idaho will be counted if the employee has been on paid status at half time or greater.

Employees on regular academic year appointments receive credit for twelve (12) months of service, provided all other requirements of qualified service are met. Service while employed on a temporary hourly (TH) basis will not be recognized as qualified service. Qualified service performed prior to a break in service is permanently forfeited, except as provided in C-1-e. [rev. 7-15]

C-1-d. Active Health Plan Enrollment. For purposes of determining eligibility for the Retiree Health Program, years of active health Plan enrollment will be counted for each fiscal Plan year in which the employee has been enrolled as a primary subscriber for dental, life or disability benefits, or each year of employment in a position eligible for University of Idaho health benefits, excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not eligible under the University’s criteria for University subsidized health benefits. [rev. 7-15]

C-1-e. Break in Service. A break in service occurs when there is a separation from qualified service for one day or more. For purposes of this policy, after a break in service an employee forfeits all prior qualified service, unless the employee had at least five (5) years of continuous qualified service prior to the break in service. A break in service does not include the following: (1) periods of any category of approved paid or unpaid leave of absence; or (2) periods during which the employee is eligible for and has opted to remain on the lay-off roster. Information on the lay-off process is found on the HR webpage. [rev. 7-19]
C-1.f. Part-time Employees. Qualified part-time employees who are employed in a health benefits eligible position are eligible for the Retiree Health Program upon retirement excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not eligible under the University’s criteria for University subsidized health benefits. Service credit for part-time employees will be earned based on a prorated percentage of their full-time status. An employee who temporarily reduces his or her hours of work and remains employed in a health benefits eligible position may earn up to two (2) years of full-time service credit if hours have been temporarily reduced to accommodate transitioning into retirement or to accommodate a family or personal matter. In either case, the employee must obtain written approval in advance from his or her supervisor and Benefit Services. [rev. 7-15]

C-2. Honored Staff Retiree Privileges

C-2-a. Eligibility Requirements. Upon retirement, each member of the classified or exempt staff whose service to the University of Idaho meets one of the following criteria, and whose employment was not terminated for cause, is designated an honored staff retiree:

i. Completion of 30 years of qualified service; or
ii. Completion of 15 years of qualified service and attainment of age 64; or
iii. Attainment of age 55 and completion of a number of years of qualified service, such that the sum of the years of age and the years of service is 80.

C-2-b. Privileges. Each member of the classified or exempt staff meeting the above eligibility requirements is awarded a presidential commendation for long and faithful service, and his or her name is entered on the list of honored staff retirees especially worthy of continued recognition as members of the University of Idaho community. Privileges available to honored staff retirees are as follows:

i. Membership in the University of Idaho Retirees Association (UIRA);
ii. Education privileges [see FSH 3760];
iii. One, free non-transferable gold parking permit each year;
iv. Listing in the campus directory;
v. Honored staff retirees who elect to maintain an active computing account will retain access to services provided by Information Technology Services (ITS) including electronic communications (e.g. e-mail, instant messaging, etc.), technical support, and offered software; [rev. 7-15]
vii. Eligibility to receive mailings (upon request), such as the University of Idaho Register and similar publications; and
viii. Inclusion in appropriate university, college, and departmental functions.

C-3. Privileges for Emeritus Faculty Retirees. Privileges for emeritus faculty retirees are enumerated in FSH 1565 E-4. [ed. 9-07, 6-09, 7-15]
C-4. Retiree Health Program Eligibility. The Retiree Health Program is divided into four tiers of eligibility requirements and includes varying levels of benefits. Benefits offered in each tier are subject to change. Enrollment in the UI medical plan is required at the time of retirement to transition to the retiree medical plan. As part of open enrollment Benefit Services shall inform employees they must be enrolled in a UI health plan at the time of retirement in order to be eligible for the retiree health plan. [rev. 7-19]

C-4-a. Tier I -- Eligibility Criteria. To qualify for Tier I, an employee must be retired and covered under the Retiree Health Program pursuant to a prior version of this policy, or meet the following criteria on or before September 30, 2007, but may retire later:

1. Hired on or before January 1, 2002; and
2. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (5) five years prior to retirement; and [rev. 7-15]
3. Meets one of the following three criteria:
   1. Has completed at least 30 years of qualified service, regardless of age; or
   2. The sum of the number of years of age and qualified service is equal to or greater than 80, to include a minimum age of 55 years; or
   3. Has completed at least 15 years of qualified service and attained a minimum age of at least 64 years.

C-4-b. Tier II -- Eligibility Criteria. To qualify for Tier II, an employee must meet the following criteria on or before June 30, 2011, but may retire later:

1. Hired on or before January 1, 2002; and
2. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (15) fifteen years prior to retirement; and [rev. 7-15]
3. Meets one of the following criteria:
   1. Has completed at least 30 years of qualified service, regardless of age; or
   2. The sum of the number of years of age, subject to a minimum age of 55 years; plus qualified service, subject to a minimum of 15 years, is equal to or greater than 80.

C-4-c. Tier III -- Eligibility Criteria. To qualify for Tier III, an employee must meet the following criteria on or after July 1, 2011, but may retire later:

1. Hired on or before January 1, 2002; and
2. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (20) twenty years prior to retirement; and [rev. 7-15]
3. Meets one of the following criteria:
   1. Has completed at least 30 years of qualified service, regardless of age; or
2. Has completed at least 20 years of qualified service, and the sum of the
number of years of age, subject to a minimum age of 55 years, plus years
of qualified service is equal to or greater than 90.

C-4-d. Tier IV -- Eligibility Criteria. To qualify for Tier IV, an employee must meet the
following criteria:

i. Has been enrolled, or eligible to enroll, as the primary subscriber in the
active health plan for at least (10) ten years prior to retirement; and [rev. 7-15]

ii. Has completed at least 10 years of qualified service; and

iii. Is at least 55 years of age; and

iv. The employee’s current hire date is prior to July 1, 2020. [rev. 7-15***]

C-4-e. Ineligible Employees. Employees with a current hire date on or after July
3, 2020 are outside of the eligibility tiers and are not eligible for retiree health
benefits.

C-5. Continued Eligibility for the Retiree Health Program. Once a Retiree has qualified for the
University of Idaho Retiree Health Program, the following conditions must be met for continued
eligibility.

C-5-a. Retirees and their dependents must enroll in the Retiree Health Program when
first eligible or they will lose eligibility. Upon eligibility for the Program, retirees will be
required to make a one-time, irrevocable election of available plan options. Current
retirees made this election no later than July 1, 2007. Retirees, who are enrolled in the
Program; but fail to make a election will be automatically and irrevocably enrolled in the
selected default Plan.

Plan options and default plans may vary from year to year. Information regarding plan
options and which plans will be used for default is available from Benefit Services. [ed.
7-15]

C-5-b. For eligible retirees, coverage is effective on the first of the month following the
effective date of retirement. In order to avoid a gap in coverage between the last day of
work and the first day of coverage under the Retiree Health Program, coverage for
eligible retirees under the active health benefit program will continue until coverage
under Retiree Health Program begins. [rev. 7-19]

C-5-c. Covered dependents are first eligible on the same date the retiree becomes
eligible or on the date they later become a dependent.

C-5-d. All participants who qualify for Post-Medicare coverage, including covered
dependents, in any tier of the Retiree Health Program must elect Medicare Parts A and
B as their primary payer of benefits when they first become eligible, except to the
extent that federal law requires the Retiree Health Program to be primary. All
participants must comply with rules set forth in the Plan document for each Plan and/or

Commented [NK(1)]: This language closes Tier IV for employees hired July 1, 2020 and after.

Commented [NK(2)]: This language clarifies the cutoff of retirement health benefits for employees hired on or after
July 1, 2020

Commented [NK(3)]: This language is necessary because there will be different Post-Medicare coverage terms for the
different tiers
tier of eligibility with respect to Medicare Prescription Drug Coverage (Part D). (See C-7 below for additional information on post-Medicare coverage.)

C-5-e. All participants, including covered dependents, in any tier are subject to coordination of benefits rules as set forth in the applicable plan documents.

C-5-f. If coverage under the Retiree Health Program is ended for any reason, there is no opportunity to rejoin the Program at a later date. The only exception is for a Retiree who returns to a benefit eligible position at the University of Idaho following his or her participation in the Retiree Health Program. In this instance, Retiree Health Program coverage will be temporarily suspended. After active employment ends, the Retiree will have the right of reinstatement in the same tier and Plan election(s) that applied on the original date of retirement.

C-6. Benefits. Programs offered vary from tier to tier and benefits vary within the Plans available within each tier, as set forth in the applicable plan document(s). These are subject to change without notice. See benefits webpage for governing plan documents. [rev. 7-19]

C-7. Contributions and Post-Medicare Coverage. Effective July 1, 2007, all Qualified retirees will share in the cost of coverage through a monthly contribution, unless a Plan option which requires no monthly contribution is elected (if applicable). Contribution Rates for retiree coverage are established annually by the University.

The University will offer at least one medical Plan option to Tier I retirees which does not require retiree cost sharing through monthly contributions. It is the intention of the University to offer at least one medical Plan option that is less costly, or that for Tiers II, III may have no retiree cost sharing. The Plan with no cost or less retiree monthly cost sharing will have less generous benefits such as higher deductibles and higher out of pocket expenses.

C-7-a(i). Tier I Retirees – Contribution Rate Increase and Post-Medicare Coverage:

• Contribution rates charged to Tier I retirees shall not increase in any one year over the previous year by more than 10%.

  Effective July 1, 2007, retiree cost sharing will begin for retirees in Tier I at a rate of $30.00 per month for non-Medicare eligible retirees and $20.00 per month for Medicare eligible retirees; or with no required retiree contribution if the Plan option with less generous benefits (i.e.; higher deductibles and other out of pocket expenses) is elected.

  Rates are subject to increase annually. Limits on the amount of increase apply only to Tier I retirees and shall not increase in any one year over the previous year by more than 10%.

• All future retirees will make contributions based on the rate in effect for their respective tier and Plan election at the time of retirement.
C-7-a(i). Tier II and III Retirees – Post-Medicare Coverage:
• Tier II and III employees who are eligible to retire prior to January 1, 2021 continue to be eligible for Post-Medicare coverage as long as they stay eligible for participation in the Plan.
• Tier II and III employees who are not eligible to retire prior to January 1, 2021 are eligible for Post-Medicare coverage only through December 31, 2023 and will pay contribution rates for post-Medicare coverage per the following schedule: 25% of the cost for Post-Medicare coverage in calendar year 2021, 50% of the cost for Post-Medicare coverage in calendar year 2022, and 75% of the cost for Post-Medicare coverage in calendar year 2023. Thereafter, Post Medicare coverage ceases.

C-7-b. Tier IV Retirees – Contributions and Post-Medicare Coverage:
• Except for retirees who qualify as a retiree with a disability and are not yet eligible for Medicare, Tier IV retirees will be responsible for 100 percent of the cost of retiree coverage.
• Tier IV employees who are retired or are eligible to retire prior to January 1, 2021 continue to be eligible for Post-Medicare coverage at full cost as long as they stay eligible for participation in the Plan.
• Tier IV employees who are not eligible to retire prior to January 1, 2021 are eligible for Post-Medicare coverage at full cost only through December 31, 2023.

C-7-c. Sick Leave Conversion for Tier IV: Tier IV is allowed sick leave conversion equal to one half of the unused sick leave hours available at the time of retirement accrued since July 1, 1976, not to exceed a benefit of 600 hours, which may be used to pay for the cost of Tier IV retiree health coverage. [rev. 7-19]

EXAMPLE #1: At the time of retirement, Retiree has accrued 1000 hours of sick leave. Retiree may convert 500 hours to pay for retiree medical health coverage.

EXAMPLE #2: At the time of retirement, Retiree has accrued 1400 hours of sick leave. Retiree may convert 600 hours to pay for retiree medical health coverage. Only Retirees in Tier IV who had a sick leave balance eligible for sick leave conversion as described above are eligible for sick leave conversion. Sick leave conversion is limited to use for the cost of UI retiree medical coverage for the retiree only. [rev. 7-19]

C-7-d. Dependents: Retirees in all tiers will be responsible for payment of one hundred percent of the cost of coverage for all covered dependents.

C-7-e. Payment: The cost (if applicable) of retiree and/or dependent coverage must be paid in a timely manner. All plans of coverage will be terminated if the required payment is not made.
payment for all plans of coverage is not received within 30 days of the date it is due.

[rev. 7-19]

D. Surviving Spouse and Children. [ren. 7-19]

D-1. Faculty Emeritus or Honored Staff Retiree Privileges. There is no transfer of Emeritus or Honored Staff privileges as described above or in FSH 1565 E-4. [ed. 6-09]

D-2. Retiree Health Program. A covered dependent spouse or child may continue under the Retiree Health Program under the following terms and conditions:

D-2-a. Following the death of the retiree, a covered dependent spouse or child may continue coverage under the Retiree Health Program, provided all other Program and plan eligibility requirements are met.

D-2-b. Effective July 1, 2007, a covered dependent spouse of a deceased retiree may remain enrolled in the Retiree Health Program even if he or she later remarries, provided all other Program and plan requirements are met.

D-2-c. A new spouse of a former covered dependent spouse, or any other newly acquired dependent, may not be added to the Retiree Health Program. However, a dependent child of the retiree who is born after the death of the retiree may be added within 30 days of birth.

D-2-d. The covered dependent spouse or eldest covered dependent child will become the new “primary subscriber” in the same Plan election and tier of coverage that applied prior to the retiree’s death, provided all other Program and plan eligibility requirements continue to be met. However, regardless of which tier applies, the new primary subscriber will be responsible for the entire cost of coverage based on the full subscriber rate for himself or herself and for all covered dependents, based on the subscriber and dependent rates in effect at that time.

D-2-e. If the covered dependent spouse or eldest child does not have the same Medicare eligibility as the retiree had at the time of death, the surviving covered dependent(s) will be transferred to the retiree plan that is consistent with the new primary subscriber’s own Medicare eligibility.

D-2-f. If a covered dependent spouse or child becomes eligible for coverage under another employer’s health plan as either the primary subscriber or as a dependent, eligibility for coverage under the Retiree Health Program will end. Waiving coverage under another employer’s plan also will result in a loss of eligibility for the Retiree Health Program.
RETIRED PRIVILEGES AND PROGRAMS

PREAMBLE. This section was an original part of the 1979 Handbook, was changed in July of 1994 to add the optional retirement plan, and most recently changes were made in 2007 to the eligibility criteria and benefits available through the University of Idaho. The January 2008 version updated and supersedes all prior versions. In July 2015 updates were made due to Health Care Reform and in July 2019 changes were again made to comply with the retiree settlement.

The benefits and programs described in this section are governed by applicable laws and plan documents and are subject to change at any time. In the event of a conflict between this policy and the applicable law or plan document, the law or plan document will control. Employees contemplating retirement should make an appointment with a Benefit Services Specialist to verify eligibility and discuss benefits and options for retirement.

Further information regarding retirement is available from Human Resources, Benefit Services www.uidaho.edu/benefits (208-885-3697).

CONTENTS:

A. Introduction
B. State and Federal Retirement Plans
C. University of Idaho Privileges and Programs
D. Disability Retirement
E. Surviving Spouse and Children

A. INTRODUCTION. This policy describes the retirement privileges and programs available to eligible University of Idaho employees upon retirement. The University of Idaho through its Board of Regents reserves the right to change, amend or discontinue any part of the programs described within or any one or all of these programs in part or entirely at any time, to the extent allowed by law. This policy should not in any way be construed as a guarantee of continued employment.

A-1. State and Federal Retirement Plans. These include state and federal retirement plans such as the Public Employees Retirement System of Idaho (PERSI), the Idaho Optional Retirement Plan (IORP), the Civil Service Retirement System and the Federal Employees Retirement System. Eligibility criteria and benefits are determined under each plan and can be found in the respective plan documents, which are subject to change. In the event of a conflict between this policy and the plan documents, the plan documents control in all respects.

A-2. University of Idaho Retirement Privileges and Programs. These include faculty emeritus and honored staff retiree privileges, eligibility to participate in retiree health programs of the University of Idaho (Retiree Health Program).

A-2-a. Emeritus Faculty and Honored Staff Retiree Privileges. This policy sets forth the eligibility criteria for, and benefits of, honored staff retiree privileges. For faculty emeritus privileges, see FSH 1565 HE. Emeritus or honored staff retiree status does not automatically confer eligibility for the Retiree Health Program.

A-2-b. Retiree Health Program. This policy sets forth eligibility criteria for the Retiree Health Program. Information regarding specific benefits is contained in the applicable plan documents and may change. In the event of a conflict between the information in the Plan documents and those presented in this policy, the plan documents will control.

B. STATE AND FEDERAL RETIREMENT PLANS. University of Idaho employees participate in the following plans, depending on eligibility. Employee contributions are made to PERSI, IORP, the Civil Service Retirement System and the Federal Employees Retirement System through payroll deduction. The University of Idaho contributes a portion of salary and the employee contributes a portion of salary. These amounts vary from...
B-1. Public Employees Retirement System of Idaho (PERSI). PERSI is a defined benefit retirement plan. Eligibility requirements and benefits are governed by the PERSI plan document, which is available at www.persi.idaho.gov. Employees also may contact the plan administrator listed below. The contact information can be found on the benefits website. [ed. 7-15]

PERSI  
Public Employee Retirement System of Idaho

B-2. Idaho Optional Retirement Plan (IORP). IORP is a defined contribution retirement plan. There are currently two plan administrator choices for employees: The contracts for plan administrators are managed through the Board of Regents. For information on the plan offerings visit the benefit webpage. Eligible employees must enroll and select a Plan administrator and self-directed investments when they become eligible. In the event that a Plan administrator and/or investment options are not elected by the employee before contributions begin, default elections and/or investments will be selected. Employee and employer contributions will be directed to the default Plan administrator and deposited within default investment choices, unless or until these have been changed by the employee. Eligibility requirements and benefits are governed by the IORP plan document. For more information, contact the plan administrator. The contact information for each can be found on the benefits website. [ed. 7-15, 7-19]


C. UNIVERSITY OF IDAHO RETIREMENT PRIVILEGES AND PROGRAMS.

C-1. Definitions.

C-1.a. Retirement. An employee may bring about the termination of his or her employment by resigning [see 3930 A and 3940]. Resignation is considered to be "retirement" if the employee has qualified for certain benefits based on age and length of qualified service (defined below). The effective date of retirement shall coincide with the last work day in a calendar month or last work day of a fiscal year. The last day of employment is generally the last day worked [see FSH 3710 B-9]. [ed. 7-15] A discussion with benefit services regarding the anticipated specific date of retirement will help facilitate the transition of appropriate benefits and privileges in a seamless manner. [rev. 7-19]

C-1.b. Retiree. A retiree is a former employee who has terminated his or her employment through retirement.

C-1.c. Qualified Service. For purposes of determining retiree health program eligibility, qualified service includes service while employed at the University of Idaho in a position eligible for University of Idaho health benefits excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not eligible under the University’s criteria for University subsidized health benefits. Service to the University of Idaho will be counted if the employee has been on paid status at half time or greater. Employees on regular academic year appointments receive credit for twelve (12) months of service, provided all other requirements of qualified service are met. Service while employed on a temporary hourly (TH) basis will not be recognized as qualified service. Qualified service performed prior to a break in service is permanently forfeited, except as provided in C-1.-c. [rev. 7-15]

C-1.d. Active Health Plan Enrollment. For purposes of determining eligibility for the Retiree Health Program, years of active health Plan enrollment will be counted for each fiscal Plan year in which the employee has been enrolled as the primary subscriber for dental, life and disability benefits or each year of employment in a position eligible for University of Idaho health benefits excluding those who are only

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eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not eligible under the University’s criteria for University subsidized health benefits. [rev. 7-15]

C-1-e. Break in Service. A break in service occurs when there is a separation from qualified service for one day or more. For purposes of this policy, a break in service for qualified service, unless the employee had at least five (5) years of continuous qualified service prior to the break in service. A break in service does not include the following: (1) periods of any category of approved paid or unpaid leave of absence; or (2) periods during which the employee is eligible for and has opted to remain on the lay-off roster. Information on the lay-off process is found on the HR webpage. [rev. 7-19]

C-1-f. Part-time Employees. Qualified part-time employees who are employed in a health benefits eligible position are eligible for the Retiree Health Program upon retirement excluding those who are only eligible under the Patient Protection and Affordable Care Act (PPACA). This PPACA group is not eligible under the University’s criteria for University subsidized health benefits. Service credit for part-time employees will be earned based on a prorated percentage of their full-time status. An employee who temporarily reduces his or her hours of work and remains employed in a health benefits eligible position may earn up to two (2) years of full-time service credit if hours have been temporarily reduced to accommodate transitioning into retirement or to accommodate a family or personal matter. In either case, the employee must obtain written approval in advance from his or her supervisor and Benefit Services. [rev. 7-15]

C-2. Honored Staff Retiree Privileges

C-2-a. Eligibility Requirements. Upon retirement, each member of the classified or exempt staff whose service to the University of Idaho meets one of the following criteria, and whose employment was not terminated for cause, is designated an honored staff retiree:

1. Completion of 30 years of qualified service; or
2. Completion of 15 years of qualified service and attainment of age 64; or
3. Attainment of age 55 and completion of a number of years of qualified service, such that the sum of the years of age and the years of service is 80.

C-2-b. Privileges. Each member of the classified or exempt staff meeting the above eligibility requirements is awarded a presidential commendation for long and faithful service, and his or her name is entered on the list of honored staff retirees especially worthy of continued recognition as members of the University of Idaho community. Privileges available to honored staff retirees are as follows:

1. Membership in the University of Idaho Retirees Association (UIRA);
2. Education privileges [see FSH 3760];
3. One, free non-transferable gold parking permit each year;
4. Listing in the campus directory;
5. Honored staff retirees 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; [rev. 7-15]
6. Eligibility to receive mailings (upon request), such as the University of Idaho Register and similar publications; and
7. Inclusion in appropriate university, college, and departmental functions.

C-3. Privileges for Emeritus Faculty Retirees. Privileges for emeritus faculty retirees are enumerated in FSH 1565 E-4. [ed. 9-07, 6-09, ed. 7-15]

C-4. Retiree Health Program Eligibility. The Retiree Health Program is divided into four tiers of eligibility requirements and includes varying levels of benefits. Benefits offered in each tier are subject to change. Enrollment in the UI medical plan is required at the time of retirement to transition to the retiree medical plan. As part of open enrollment Benefit Services shall inform employees they must be enrolled in a UI health plan at the time of retirement in order to be eligible for the retiree health plan. [rev. 7-19]
**C-4-a. Tier I -- Eligibility Criteria.** To qualify for Tier I, an employee must be retired and covered under the Retiree Health Program pursuant to a prior version of this policy, or meet the following criteria on or before September 30, 2007, but may retire later:

1. Hired on or before January 1, 2002; and
2. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (5) five years prior to retirement; and [rev. 7-15]
3. Meets one of the following three criteria:
   a. Has completed at least 30 years of qualified service, regardless of age; pr
   b. The sum of the number of years of age and qualified service is equal to or greater than 80, to include a minimum age of 55 years; pr
   c. Has completed at least 15 years of qualified service and attained a minimum age of at least 64 years.

**C-4-b. Tier II -- Eligibility Criteria.** To qualify for Tier II, an employee must meet the following criteria on or before June 30, 2011, but may retire later:

1. Hired on or before January 1, 2002; and
2. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (15) fifteen years prior to retirement; and [rev. 7-15]
3. Meets one of the following criteria:
   1. Has completed at least 30 years of qualified service, regardless of age; pr
   2. The sum of the number of years of age, subject to a minimum age of 55 years, plus years of qualified service, subject to a minimum of 15 years, is equal to or greater than 80.

**C-4-c. Tier III -- Eligibility Criteria.** To qualify for Tier III, an employee must meet the following criteria on or after July 1, 2011, but may retire later:

1. Hired on or before January 1, 2002; and
2. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (20) twenty years prior to retirement; and [rev. 7-15]
3. Meets one of the following criteria:
   1. Has completed at least 30 years of qualified service, regardless of age; pr
   2. Has completed at least 20 years of qualified service, and the sum of the number of years of age, subject to a minimum age of 55 years, plus years of qualified service is equal to or greater than 90.

**C-4-d. Tier IV -- Eligibility Criteria.** To qualify for Tier IV, an employee must meet the following criteria:

1. Has been enrolled, or eligible to enroll, as the primary subscriber in the active health plan for at least (10) ten years prior to retirement; and [rev. 7-15]
2. Has completed at least 10 years of qualified service; and
3. Is at least 55 years of age; and [rev. 7-15]
4. The employee’s current hire date is prior to July 1, 2020, [rev. 7-15, 3-20]

**c. Ineligible Employees.** Employees with a current hire date on or after July 2, 2020, are outside of the eligibility tiers and are not eligible for retiree health benefits. [add. 3-20]

**C-5. Continued Eligibility for the Retiree Health Program.** Once a Retiree has qualified for the University of Idaho Retiree Health Program, the following conditions must be met for continued eligibility.

**C-5-a.** Retirees and their dependents must enroll in the Retiree Health Program when first eligible or they will lose eligibility. Upon eligibility for the Program, retirees will be required to make a one-time,
irrevocable election of available plan options. Current retirees made this election no later than July 1, 2007. Retirees, who are enrolled in the Program; but fail to make an election will be automatically and irrevocably enrolled in the selected default Plan. Plan options and default plans may vary from year to year. Information regarding plan options and which plans will be used for default is available from Benefit Services. [ed. 7-15]

C-5-b. For eligible retirees, coverage is effective on the first of the month following the effective date of retirement. In order to avoid a gap in coverage between the last day of work and the first day of coverage under the Retiree Health Program, coverage for eligible retirees under the active health benefit program will continue until coverage under Retiree Health Program begins. [rev. 7-19]

C-5-c. Covered dependents are first eligible on the same date the retiree becomes eligible or on the date they later become a dependent.

C-5-d. All participants who qualify for post-Medicare coverage, including covered dependents, in any tier of the Retiree Health Program must elect Medicare Parts A and B as their primary payer of benefits when they first become eligible, except to the extent that federal law requires the Retiree Health Program to be primary. All participants must comply with rules set forth in the Plan document for each Plan and/or tier of eligibility with respect to Medicare Prescription Drug Coverage (Part D). See C-7 for additional information on post-Medicare coverage. [rev. 3-20]

C-5-e. All participants, including covered dependents, in any tier are subject to coordination of benefits rules as set forth in the applicable plan documents.

C-5-f. If coverage under the Retiree Health Program is ended for any reason, there is no opportunity to rejoin the Program at a later date. The only exception is for a Retiree who returns to a benefit eligible position at the University of Idaho following his or her participation in the Retiree Health Program. In this instance, Retiree Health Program coverage will be temporarily suspended. After active employment ends, the Retiree will have the right of reinstatement in the same tier and Plan election(s) that applied on the original date of retirement.

C-6. Benefits. Programs offered vary from tier to tier and benefits vary within the Plans available within each tier, as set forth in the applicable plan document(s). These are subject to change without notice. See benefits webpage for governing plan documents. [rev. 7-19]

C-7. Contributions and Post-Medicare Coverage. Effective July 1, 2007, all Qualified retirees will share in the cost of coverage through a monthly contribution, unless a Plan option which requires no monthly contribution is elected (if applicable). Contribution rates for retiree coverage are established annually by the University. [rev. 3-20]

The University will offer at least one medical Plan option to Tier I retirees which does not require retiree cost sharing through monthly contributions. It is the intention of the University to offer at least one medical Plan option that is less costly, or that for tiers two and three may have no retiree cost sharing. The Plan with no cost or less retiree monthly cost sharing will have less generous benefits such as higher deductibles and higher out of pocket expenses.

C-7-a. Tier I Retirees—Contribution Rate Increase and Post-Medicare Coverage. [rev. 3-20]: Effective July 1, 2007, retiree cost sharing will begin for retirees in Tier I at a rate of $30.00 per month for non-Medicare eligible retirees and $20.00 per month for Medicare eligible retirees; or with no required retiree contribution if the Plan option with less generous benefits (i.e., higher deductibles and other out of pocket expenses) is elected.

1. Contribution rates charged to Tier I retirees shall not increase in any one year over the previous year by more than 10%.
Chapter III: EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF
Section 3730: Retirement Benefits

2. Tier I retirees continue to be eligible for post-Medicare coverage as long as they stay eligible for participation in the Plan.

b. Tier II and Tier III Retirees—Post-Medicare Coverage. [add. 3-20]
   1. Tier II and Tier III employees who are eligible to retire prior to January 1, 2021, continue to be eligible for post-Medicare coverage as long as they stay eligible for participation in the Plan.
   2. Tier II and Tier III employees who are not eligible to retire prior to January 1, 2021, are eligible for post-Medicare coverage only through December 31, 2023, and will pay contribution rates for post-Medicare coverage per the following schedule: 25% of the cost for post-Medicare coverage in calendar year 2021, 50% of the cost for post-Medicare coverage in calendar year 2022, and 75% of the cost for post-Medicare coverage in calendar year 2023. Thereafter, post-Medicare coverage ceases.

Rates are subject to increase annually. Limits on the amount of increase apply only to Tier I retirees and shall not increase in any one year over the previous year by more than 10%.

All future retirees will make contributions based on the rate in effect for their respective tier and Plan election at the time of retirement.

C-7-b. Tier IV Retirees—Contributions and Post-Medicare Coverage. [rev. 7-19, 3-20]
   1. Except for retirees who qualify as a retiree with a disability and are not yet eligible for Medicare, Tier IV retirees will bear 100 percent of the cost of retiree coverage.
   2. Tier IV employees who are retired or eligible to retire prior to January 1, 2021, continue to be eligible for post-Medicare coverage at full cost as long as they stay eligible for participation in the Plan.
   3. Tier IV employees who are not eligible to retire prior to January 1, 2021, are eligible for post-Medicare coverage at full cost only through December 31, 2023.

C-7-c. Sick Leave Conversion for Tier IV. Tier IV is allowed sick leave conversion equal to one half of the unused sick leave hours available at the time of retirement accrued since July 1, 1976, not to exceed a benefit of 600 hours, which may be used to pay for the cost of Tier IV retiree health coverage. [rev. 3-20].

EXAMPLE #1: At the time of retirement, Retiree has accrued 1000 hours of sick leave. Retiree may convert 500 hours to pay for retiree medical health coverage. [ed. 3-20]

EXAMPLE #2: At the time of retirement, Retiree has accrued 1400 hours of sick leave. Retiree may convert 600 hours to pay for retiree health coverage.

Only Retirees in Tier IV who had a sick leave balance eligible for sick leave conversion as described above are eligible for sick leave conversion. Sick leave conversion is limited to use for the cost of UI retiree medical coverage for the retiree only.

C-7-d. Dependents: Retirees in all tiers will be responsible for payment of one hundred percent of the cost of coverage for all covered dependents.

C-7-e. Payment: The cost (if applicable) of retiree and/or dependent coverage must be paid in a timely manner. All plans of coverage will be terminated if the required payment for all plans of coverage is not received within 30 days of the date it is due.

D. Surviving Spouse and Children. [rem. 7-19]
D-1. Faculty Emeritus or Honored Staff Retiree Privileges. There is no transfer of Emeritus or Honored Staff privileges as described above or in FSH 1565 E-4. [ed. 6-09]

D-2. Retiree Health Program. A covered dependent spouse or child may continue under the Retiree Health Program under the following terms and conditions:

D-2-a. Following the death of the retiree, a covered dependent spouse or child may continue coverage under the Retiree Health Program, provided all other Program and plan eligibility requirements are met.

D-2-b. Effective July 1, 2007, a covered dependent spouse of a deceased retiree may remain enrolled in the Retiree Health Program even if he or she later remarries, provided all other Program and plan requirements are met.

D-2-c. A new spouse of a former covered dependent spouse, or any other newly acquired dependent, may not be added to the Retiree Health Program. However, a dependent child of the retiree who is born after the death of the retiree may be added within 30 days of birth.

D-2-d. The covered dependent spouse or eldest covered dependent child will become the new “primary subscriber” in the same Plan election and tier of coverage that applied prior to the retiree’s death, provided all other Program and plan eligibility requirements continue to be met. However, regardless of which tier applies, the new primary subscriber will be responsible for the entire cost of coverage based on the full subscriber rate for himself or herself and for all covered dependents, based on the subscriber and dependent rates in effect at that time.

D-2-e. If the covered dependent spouse or eldest child does not have the same Medicare eligibility as the retiree had at the time of death, the surviving covered dependent(s) will be transferred to the retiree plan that is consistent with the new primary subscriber’s own Medicare eligibility.

D-2-f. If a covered dependent spouse or child becomes eligible for coverage under another employer’s health plan as either the primary subscriber or as a dependent, eligibility for coverage under the Retiree Health Program will end. Waiving coverage under another employer’s plan also will result in a loss of eligibility for the Retiree Health Program.
FY 2021 BUDGET REDUCTION PROCESS UPDATE
FACULTY SENATE
MARCH 10, 2020

BUDGET REDUCTION TARGETS BY EXECUTIVE LEVEL:

<table>
<thead>
<tr>
<th>Year</th>
<th>Division</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>President’s Areas</td>
<td>$838,000</td>
</tr>
<tr>
<td>2020</td>
<td>Provost / Academic Affairs</td>
<td>$15,740,000</td>
</tr>
<tr>
<td>2030</td>
<td>Division of Finance &amp; Administration</td>
<td>$3,191,000</td>
</tr>
<tr>
<td>2040</td>
<td>Information Technology Services</td>
<td>$1,246,000</td>
</tr>
<tr>
<td>2060</td>
<td>University Research</td>
<td>$985,000</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>$22,000,000</td>
</tr>
</tbody>
</table>

BUDGET REDUCTION PLANS – SUMMARY BY CATEGORY AS OF 03/06/20:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary and Benefits (includes Temp Help) *</td>
<td>$17,787,812</td>
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<tr>
<td>Non-Personnel</td>
<td>$4,212,188</td>
</tr>
<tr>
<td>Total</td>
<td>$22,000,000</td>
</tr>
</tbody>
</table>

*Net of $304,228 being held within Academic Affairs for ORIP/VSIP incentive payments
STATUS UPDATES AND SUMMARIES BY EXECUTIVE LEVEL:

2010 – PRESIDENT’S AREAS: In process

The plans for units reporting directly to the President have been approved by President Green and tentative detailed reduction templates have been submitted to University Budget and Planning for review and processing.

Summary of Reductions by Category:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary and Benefits</td>
<td>$729,322</td>
</tr>
<tr>
<td>Non-Personnel *</td>
<td>108,678</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$838,000</strong></td>
</tr>
</tbody>
</table>

Summary of Reductions by Unit:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intercollegiate Athletics</td>
<td>$510,000</td>
</tr>
<tr>
<td>McClure Center</td>
<td>32,000</td>
</tr>
<tr>
<td>Civil Rights &amp; Investigations</td>
<td>49,000</td>
</tr>
<tr>
<td>General Counsel *</td>
<td>110,000</td>
</tr>
<tr>
<td>Equity &amp; Diversity *</td>
<td>137,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$838,000</strong></td>
</tr>
</tbody>
</table>

*Negative base reserve budgets will be entered into the system for portions of permanent holdback targets not specifically identified for FY 20201 – total of $72,567. These amounts have been included in “Non-Personnel” for the purpose of this update.*
2020 – PROVOST/ACADEMIC AFFAIRS: In process

The plan for Provost/Academic Affairs has been approved by President Green and Academic Budget and Planning is in the process of reviewing detailed reduction templates prior to submittal to University Budget and Planning for processing.

Summary of Reductions by Category – Subject to change upon final review:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary and Benefits</td>
<td>$12,604,340</td>
</tr>
<tr>
<td>Non-Personnel</td>
<td>3,439,888</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$16,044,228</strong></td>
</tr>
</tbody>
</table>

* Note: Additional reductions above the $15.74M target will be held within Academic Affairs to be used toward ORIP and VSIP incentive payments and then returned to units after the three-year payout.

Summary of Reductions by Unit:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Affairs</td>
<td>370,868</td>
</tr>
<tr>
<td>Strategic Enrollment Management</td>
<td>58,183</td>
</tr>
<tr>
<td>Vice Provost for Faculty</td>
<td>43,509</td>
</tr>
<tr>
<td>Vice Provost for Academic Initiatives</td>
<td>247,539</td>
</tr>
<tr>
<td>University Outreach – Boise</td>
<td>0</td>
</tr>
<tr>
<td>University Outreach – Idaho Falls</td>
<td>344,845</td>
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<tr>
<td>University Outreach – Northern Idaho</td>
<td>221,428</td>
</tr>
<tr>
<td>Provost/Executive Vice President</td>
<td>362,542</td>
</tr>
<tr>
<td>General Library</td>
<td>1,208,955</td>
</tr>
<tr>
<td>College of Graduate Studies</td>
<td>1,230,776</td>
</tr>
<tr>
<td>College of Art &amp; Architecture</td>
<td>708,330</td>
</tr>
<tr>
<td>College of Science</td>
<td>2,239,870</td>
</tr>
<tr>
<td>College of Law</td>
<td>438,019</td>
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<tr>
<td>College of Natural Resources</td>
<td>1,141,600</td>
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<tr>
<td>College of Engineering</td>
<td>2,687,279</td>
</tr>
<tr>
<td>College of Education, Health &amp; Human Sciences</td>
<td>860,565</td>
</tr>
<tr>
<td>College of Business &amp; Economics</td>
<td>919,152</td>
</tr>
<tr>
<td>College of Agricultural &amp; Life Sciences</td>
<td>676,199</td>
</tr>
<tr>
<td>College of Letters, Arts &amp; Social Sciences</td>
<td>2,284,570</td>
</tr>
<tr>
<td>Retained for ORIP / VSIP</td>
<td>(304,228)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$15,740,000</strong></td>
</tr>
</tbody>
</table>
2030 – DIVISION OF FINANCE & ADMINISTRATION: In process

The plan for DFA has been approved by President Green. A portion of the detailed reduction templates have been submitted to University Budget and Planning with the remainder due by March 15.

Summary of Reductions by Category:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Salary and Benefits</td>
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<tr>
<td>Non-Personnel</td>
<td>509,732</td>
</tr>
<tr>
<td>Total</td>
<td>$3,191,000</td>
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</table>

Summary of Reductions by Unit:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Budget &amp; Planning</td>
<td>$154,000</td>
</tr>
<tr>
<td>Security</td>
<td>44,000</td>
</tr>
<tr>
<td>Administrative Operations</td>
<td>379,000</td>
</tr>
<tr>
<td>Controller</td>
<td>470,000</td>
</tr>
<tr>
<td>Human Resources</td>
<td>273,000</td>
</tr>
<tr>
<td>Facilities Management</td>
<td>1,770,000</td>
</tr>
<tr>
<td>Finance</td>
<td>101,000</td>
</tr>
<tr>
<td>Total</td>
<td>$3,191,000</td>
</tr>
</tbody>
</table>

2040 – INFORMATION TECHNOLOGY SERVICES: Complete

The plan for ITS has been approved by President Green. The detailed reduction template has been submitted to University Budget and Planning and has been entered into the system.

Summary of Reductions by Category:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary and Benefits (includes Temp Help)</td>
<td>$1,246,000</td>
</tr>
<tr>
<td>Total</td>
<td>$1,246,000</td>
</tr>
</tbody>
</table>

Summary of Reductions by Unit:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology Innovation</td>
<td>$434,295</td>
</tr>
<tr>
<td>Customer Engagement</td>
<td>372,971</td>
</tr>
<tr>
<td>Project &amp; Portfolio Management</td>
<td>202,230</td>
</tr>
<tr>
<td>Enterprise Applications</td>
<td>196,385</td>
</tr>
<tr>
<td>ITS Administration</td>
<td>40,119</td>
</tr>
<tr>
<td>Total</td>
<td>$1,246,000</td>
</tr>
</tbody>
</table>
2060 – UNIVERSITY RESEARCH: In process

The plan for University Research has been approved by President Green. The detailed reduction template has been submitted to University Budget and Planning for review and processing.

Summary of Reductions by Category:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary and Benefits</td>
<td>$ 831,110</td>
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<tr>
<td>Non-Personnel</td>
<td>153,890</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 985,000</strong></td>
</tr>
</tbody>
</table>

Summary of Reductions by Unit:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Centers &amp; Institutes</td>
<td>$ 241,410</td>
</tr>
<tr>
<td>University Research</td>
<td>743,590</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$ 985,000</strong></td>
</tr>
</tbody>
</table>