

University of Idaho
2020 – 2021 Faculty Senate Agenda

Meeting # 9

Tuesday, October 13, 2020 at 3:30 pm
Zoom

- I. Call to Order
- II. Approval of Minutes (Vote)
 - Minutes of the 2019-2020 Faculty Senate Meeting #8 October 6, 2020 - **Attach. #1**
- III. Chair's Report
- IV. Provost's Report
- V. Other Announcements and Communications
 - Preferred Names (Lindsey Brown & Dan Ewart) - **Attach. #2**
 - Class Delivery Methods Roundtable (Rich Seamon)
- VI. New Business
- VII. Adjournment

Attachments:

- **Attach. #1** Minutes of the 2020-2021 Faculty Senate Meeting #8 October 6, 2020
- **Attach. #2** Preferred Names Handout

2020 – 2021 Faculty Senate – Approved

Meeting # 8

Tuesday, October 6, 2020, 3:30 pm – 5:00 pm

Zoom only

Present: Ahmadzadeh, Brantz, Bridges, Carney, Chapman, Dezzani, Fairley, Goebel, Hickman, Keim, Kirchmeier (Chair), Lee-Painter, McIntosh, McKellar, Meeuf (Vice-Chair), Paul, Raja, Rashed, Rinker, Rose, Sammarruca (w/o vote), Schwarzlaender, Smith, Stroebel, Torrey Lawrence (w/o vote)

Absent: Wargo (excused), Tibbals (excused), Quinnett

Guest Speakers: *Chandra Zenner Ford, Scott Green, Brad Ritts*

Call to Order: Chair Kirchmeier called the meeting to order at 3:30pm.

Approval of Minutes (vote):

- Minutes of the 2020-21 Meeting #7 – Attach. #1
There were no corrections to the minutes of the 2020-21 Meeting #7. The minutes were approved as distributed.

Chair's Report:

- While we are asking that you make every effort to get curriculum changes and program changes to the appropriate office as soon as possible, this year UCC has created some flexibility with its deadlines and is accepting materials through October 15. If you have questions, please reach out to UCC chair Jim Connors (jconnors@uidaho.edu).
- This is Homecoming Week! Tomorrow is the Homecoming Faculty Staff Alumni Luncheon from 11:00-2:00pm on Zoom, and other Homecoming events are happening throughout the week, mostly virtually. For more information, check the Homecoming schedule online.
- Thank you to the folks who worked to set up the Zoom lab and study space on the third floor of the Student Health Center. This is a space where students can attend their virtual classes while on campus, eliminating the necessity to be at home for Zoom classes and on-campus for Hyflex and in-person classes.
- Three upcoming deadlines to keep in mind:
 - Sabbatical applications are due on October 30, 2020.
 - Honorary degree nominations are due on November 16, 2020.
 - Deadline to request delay for promotion and/or tenure is March 14, 2021.Please help us spread the word about these upcoming deadlines by sharing with your colleagues.

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

Provost's Report:

- The Zoom Room mentioned in the Chair's report is the result of great work from the Dean of Students Office, particularly Director of Health and Wellness Rusty Vineyard. The original plan was to close between 12pm and 1pm, but they are reconsidering the closure to allow greater flexibility for the students.
- COVID-19 update: Updates can be found in the Friday and Monday memos from the President and the Provost. We continue to have some concerns about spread in the Greek system, and several Greek Houses are in quarantine. We will test all students starting this week. For the time being, the class delivery method is at the instructor's discretion. More information will come.

- Spring 2021 schedule: The survey sent to staff, faculty, and students closed yesterday at 5pm. We received 2,913 responses (about 28% of the university population) and approximately 7,000 comments. (The survey results are attached to these minutes.) Option C (semester starts a week later with no Spring Break) was the least popular, while Option A (no changes) and B (delayed spring break) were the most popular. A decision will have to be made after considering a variety of factors.
- Preferred names: There is strong support for the use of preferred names on Vandalweb and BbLearn. Various groups, such as ITS and the Registrar's Office, are involved and are working on this. More will be reported next week, when this item is on the agenda.

Discussion:

A Senator expressed surprise at the survey results. Is Option A (no changes) a wise decision? Sending the students home for Spring Break and then testing them all again will add substantial costs. Moreover, we will have to go online for a week after the break, which is disruptive. Provost Lawrence recognized that there are many aspects still to consider before determining the best option. Although the 7,000 comments have not yet been organized, some people mention mental health concerns if there is no break.

Another Senator wondered whether Option B (late Spring Break) might be a good compromise, because it avoids testing everyone again after the break.

We test all students, but not faculty and staff who are in contact with students. Why not? The Provost explained that there are different employment challenges with requiring employees to be tested. President Green added that the data for only employees is excellent – less than five positive cases in our testing. The numbers are also good for student-employees and for students living off campus. Based on data, there is no compelling reason to test everyone. However – Provost Lawrence added – surveillance testing for employees will continue next week through the university system.

Can employees who feel the need to be tested do so through the university? Provost Lawrence replied that, if an employee is symptomatic, they should consult their healthcare provider to obtain an order for the test and then can be tested through the university. If an employee wants to be tested for other reasons, such as contact, they should send requests to covid19questions@uidaho.edu.

The discussion moved back to the Spring schedule. It was noted again that Option C is the safest and most cost-effective, but it may be problematic to choose it given the survey results. Option A requires two full sets of testing, whereas only one set would be necessary with Option B. Provost Lawrence confirmed, aside for unforeseen circumstances that may require additional testing (as is the case this semester).

A clarification was asked on flu shots: To whom will they be available free of charge? Provost Lawrence said that the focus will be on students – they are paid for largely by student fees – but everyone covered by a U of I Health Plan can get them at no charge through their physician, pharmacies, etc.

A Senator was concerned about receiving information from multiple sources for the lists of students who are ineligible to attend classes. The Senator would appreciate more consistency. The Provost explained that there two categories listed on the "Ineligible Lists": students who were not tested, and students who tested positive. Students in quarantine are not included in the list of positive cases, because Public Health manages those cases and they do not know who is a U of I student. Thus, we have no way to cross-check all quarantine cases, aside from those which have been imposed by the university

or are self-disclosed. Furthermore, the situation changes every day, and quarantine and isolation periods can be different from case to case. We will look for ways to reduce these messages for the Spring semester. For the time being, the suggestion is to work with both the ineligible lists and absence notifications that come from the Dean of Students Office.

Committee Reports

- COVID-19 Committee Update – *David Lee-Painter*.
David Lee-Painter said that the committee is working to support the university and expressed appreciation for the hard work of Torrey Lawrence and everyone on the COVID-19 Team. There were no questions.

Other Announcements and Communications

- Review of the R1 White Paper – *Research Working Group*. Attach.#2
The Chair welcomed Scott Green, Chandra Zenner Ford, and Brad Ritts. Chandra Zenner Ford said they hope for reactions and feedback from the Senate, and so does the President, so we can best guide the next Vice President for Research and Economic development, Chris Nomura. She acknowledged Brad Ritts for his valuable contribution to the Working Group. Chandra Zenner Ford suggested starting an open forum. Brad Ritts recalled that the R1 White Paper draft was ready in late Spring 2020 and went through a review by the deans and other groups, who provided good advice. Brad Ritts pointed to the Executive Summary and the bullet points on p.7, and invited questions or comments.

Discussion

A Senator noted that Ph.D. degrees are needed in the Humanities, which do not have graduate programs. Brad Ritts said that this is not a critical component. What we need is a lot more Ph.D. graduates (overall). For a doctoral institution, 20 Ph.D. per year are required, whereas 150 per year are needed to become an R1 university. We are closer to a non-doctoral university than we are to an R1 university.

A Senator raised the point of additional faculty needed to mentor more graduate students. The Vice Chair agreed that this is also a workload issue. Why invest in RAs but only reallocate TAs? Would it not be more strategic to invest in more TAs for those programs with heavy teaching load? Brad Ritts acknowledged that the appropriate strategies depend on specific needs. This is just one strategy. Because R1 is the goal, new money is called “research support,” but RAs can teach as well. This is not an investment one can do uniformly across campus. Reallocation of TAs is based on historical practices of strategic prioritization. We want to take a holistic approach to graduate support, and TA support can, in turn, support R1 goals by contributing to good undergraduate education in departments with no graduate programs. Ultimately, it’s about what is best for the university overall, which is to support teaching and continue to invest in research.

The discussion moved to terminal degrees such as MFA and how they factor into the R1 goals. MFA uses TAs and generate many credits. The TAs graduate and typically go on to teach. Did the Working Group think of the interconnection between many factors, such as competitive salaries and waivers? Brad Ritts agreed that that there is a unique relation among graduate student research, education, undergraduate teaching, and research. The Working Group focused on R1, but we want to accomplish other goals as well. Back to the question: a terminal M.S. degree does not count towards doctoral degrees for the R1 status.

A Senator argued that producing Ph.Ds. takes a lot of time and effort for mentors. On the other end, the Academic Program Prioritization (APP) emphasized undergraduate education. Thus faculty, who have limited time, are not incentivized. Brad Ritts agreed, but noted that many aspects are still in transition, but if they line up, we can work together on different goals, rather than taking them as mutually exclusive. The Senator added that, as compared with the last APP, colleges are now judged on a new model and a different set of priorities and standards. President Green took the question and said that the details of the Financial Model and its implementation are still being worked on. Different working groups realized that alignment of their respective goals is important and can be achieved. Typically, \$1M per year is needed to subsidize TAs. Last year budget cuts were passed on to the deans who had to cut TA support. As research was a priority, the potential loss of TAs was covered. Thus, there is commitment to the teaching mission. The R1 status is attainable. Approval of the P3 project from the State Board will come to a vote in November. New money together with the new Financial Model will provide incentives. CAFE is an example. With the R1 status, we will attract more talent and thus do better research. If we get money from the P3 project, we will continue on this path. Achieving R1 status should be doable, not likely in the next cycle since we are approaching that review, perhaps at the next cycle which would be 3 years after that.

To the observation that cutting TAs in a department where all graduate students are TAs amounts to cutting Ph.D. degrees, President Green answered that we need to take a holistic approach.

What is the position of the State Board and the legislators on this point? Do they consider graduate or undergraduate education to be more important? President Green replied that both can be important. They are not mutually exclusive – for instance, he will invest \$1M in undergraduate scholarships.

A Senator reported that he had lost his own teaching assistantship to TA reallocation and had to find other means of support. But that is not easy for everyone.

The Chair and another Senator also shared that their departments had lost a number of TAs.

A Senator commented that postdoctoral associates are a priority – they are the best way to get graduate students involved in research. Whether we have TAs or RAs is not necessarily relevant, as both help bring in extramural funding. Furthermore, graduate students need the teaching experience while, at the same time, faculty get some teaching relief. So, the two positions go hand in hand. This Senator noted that, because advising graduate students no longer appears in the position description, there is no incentive for faculty to invest time in graduate student mentoring. Furthermore, it is easier to obtain funding for two years – enough to see M.S. students to completion – as compared to four years, which is why this Senator has had numerous M.S. students. A final comment was about the importance to improve department/college webpages to attract more graduate students. Brad Ritts said that extensive discussion went on in the Working Group about accountability and the different priorities perceived by faculty. As we deploy new resources, we will be able to take more risks.

Another kind of support for graduate students are library resources. There is no mention of it in the R1 White Paper. Were those conversations part of the Working Group's discussion? Brad Ritts reported that there were such conversations and challenges were identified with COGS, the library, OSP, Research and Faculty Development. Having acknowledged that, it is important

to prioritize those areas that can give immediate results. There are a number of different directions one can take, but we need to take the right first step to move forward successfully, not one that may stall our progress.

A Senator observed that typical grants are for a three-year period but seeing a Ph.D. student to completion requires more than that. Faculty hope for the best but they cannot be sure that support will continue past the three years. Some back-up support would be important to improve flexibility. Brad Ritts recognized that there is some uncertainty and the intention is to provide some “cushion” so that faculty may have more confidence when hiring graduate students.

The existence of matching funds was brought up as a big issue for some sponsors. Brad Ritts agreed with that, especially for postdoc allocations. The group is looking into this aspect.

Success in graduate student recruiting depends on the reputation of our faculty. Postdoctoral Fellows can help spread word of our reputation when they leave. Has the Working Group talked about how we can invest in areas of excellence? Indeed – Brad Ritts replied – investments need to be strategic. We need to identify our strongest programs. Investments will be guided by a thorough discussion about accountability.

A Senator asked whether the group has looked at R1 institutions and what makes them function. These universities have talented and well-known faculty and larger structures in place. Are we also thinking long-term? Brad Ritts noted that our faculty are very resourceful even without great infrastructures. But we do need to address cultural issues to best understand what is going to move us towards the boundary. Clearly, \$3M per year cannot achieve everything. There are plans from Advancement to free F&A dollars. So, there are plans to increase resources over time (see the Appendix in the White Paper). Some of those points can be acted on right now at some department level. The boundary between R1 and R2 is diffuse. On any particular metric, there can be R2 institutions which are better than the weakest R1 university.

Do we have the support of the State Board (SB)? How is this playing with the legislators? President Green answered this question. We do have SB support. As for the legislators, it varies. Some appreciate projects in agriculture or natural resources, but not necessarily research with long-term impact. They ask specific questions on areas of interest to them, such as the potato storage facility in Kimberly or CAFE. We have the potential to create a “virtuous circle.” For instance, there are possibilities of joint appointments and postdocs with INL, which will have the greatest impact on the Engineering program. They have investments in cyber security, computing, environmental impact, water issues, and more. There are also opportunities in partnerships with the industry. We need to think “outside the box” and look at the opportunities, not the obstacles.

The Chair pointed to p.2 of the White Paper and noted that most of our art programs do not award Ph.D. degrees, so TA reallocation will strongly impact the Humanities and the Arts. In closing, the Chair said that Chandra will be happy to answer more questions by email, such as those in the Zoom chat which could not be addressed for lack of time.

The Chair called for a motion to adjourn.

Adjournment: There was a motion to adjourn (Ahmadzadeh /Carney). The meeting was adjourned at 5:04pm.

Respectfully Submitted,

Francesca Sammaruca
Secretary of the University Faculty & Secretary to Faculty Senate

2020 – 2021 Faculty Senate – Pending Approval

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The Chair pointed to p.2 of the White Paper and noted that most of our art programs do not award Ph.D. degrees, so TA reallocation will strongly impact the Humanities and the Arts. In closing, the Chair said that Chandra will be happy to answer more questions by email, such as those in the Zoom chat which could not be addressed for lack of time.

The Chair called for a motion to adjourn.

Adjournment: There was a motion to adjourn (Ahmadzadeh /Carney). The meeting was adjourned at 5:04pm.

Respectfully Submitted,

Francesca Sammarruca
Secretary of the University Faculty & Secretary to Faculty Senate

University of Idaho Survey: Spring 2021 Calendar Options

October 1-5, 2020

Color Key

> 40%
30-39%
20-29%
0-19%

Option A As scheduled without changes

Option B Delay spring break until April then go online/remote

Option C Eliminate spring break and start one week later

			1st Choice	1st %	2nd Choice	2nd %	3rd Choice	3rd %
Faculty								
	357	Option A (no change)	100	28%	104	29%	131	37%
		Option B (April SB)	145	41%	139	39%	52	15%
		Option C (no SB)	109	31%	106	30%	111	31%
		No pref	3	1%	8	2%	63	18%
	40%	Total	357		357		357	
Staff								
	381	Option A (no change)	70	18%	98	26%	175	46%
		Option B (April SB)	156	41%	170	45%	46	12%
		Option C (no SB)	149	39%	97	25%	114	30%
		No pref	6	2%	16	4%	46	12%
	21%	Total	381		381		381	
Students								
	2175	Option A (no change)	985	45%	828	38%	408	19%
		Option B (April SB)	925	43%	928	43%	318	15%
		Option C (no SB)	247	11%	368	17%	1184	54%
		No pref	18	1%	51	2%	265	12%
	24%	Total	2175		2175		2175	
ALL								
	2913	Option A (no change)	1155	40%	1030	35%	714	25%
		Option B (April SB)	1226	42%	1237	42%	416	14%
		Option C (no SB)	505	17%	571	20%	1409	48%
		No pref	27	1%	75	3%	374	13%
	28%	Total	2913		2913		2913	

Preferred First Name Utilization: Analysis & Recommendation

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Introduction:

The University of Idaho recognizes that faculty, staff and students may desire to use and identify with a first and/or middle name that is different from their legal name. While we strive to support everyone in our Vandal family, there are legal and procedural considerations associated with the ability to use a preferred name. However, we are prepared to begin planning our next steps.

Technology enhancements at U of I now allow us to use preferred names. As our technology systems are highly integrated, a coordinated effort across various offices on campus is needed to ensure a consistent experience. To guide these efforts, a Preferred Name Workgroup has been tasked to guide decision-making and implementation of the use of preferred name.

Groups involved in analysis

- Admissions – Bobbi Gerry, Melissa Goodwin
- Faculty – Kristin Haltinner
- Finance – Delora Shoop
- Financial Aid – Randi Croyle
- Human Resources – Mindi Wood
- ITS – Mike Beery
- LGBTQA Office – Julia Keleher
- Registrar – Lindsey Brown
- Students – Athene Peterson, Jacob Lockhart, Hannah Spear, and Amber*
- Title IX – Erin Agidius
- UCM – Jodi Walker

* Student last name not shown to respect their privacy.

The analysis team is aware that this change will affect other areas of the University of Idaho, however we determined that the above groups were the most pertinent to forming a recommendation. Department-specific impacts, benefits, and risks are broken down in the sections below.

The purpose of this document is to outline the identified impacts, risks, and benefits of the proposed change. Recommendations were written with all of this information in mind. The level of effort required to implement the recommendations will vary by unit and will need to be prioritized with other institutional efforts. Estimates of the work required for each unit can be developed upon the acceptance of the recommendations and an understanding of the priority of this initiative.

Recommendations:

1. Implement a process for students, alumni, faculty, and staff that allows them to indicate their preferred name.

- a. The process for those adding a preferred name should be as simple as possible, and ideally would be accessible online (e.g. via VandalWeb).
 - b. The process should distribute the updated preferred name across business units and as many systems as possible shortly after the individual's preferred name is recorded.
 - c. The process should include a method to prevent offensive or obscene terms being set as preferred name.
 - d. The process should require the individual to acknowledge that they understand the potential implications of requesting a preferred name; should list locations where legal name will be used and where preferred name is currently being used.
 - i. Consider retaining acknowledgement in the individual's record.
2. Update systems and processes to use preferred name in all areas of the University that do not require use of legal name due to a relevant law, policy, regulation, or mandate.
 - a. Provide a feedback mechanism that allows additional university members to identify spaces that may have been missed and could use preferred name; include a follow up by faculty or staff to analyze if a change needs to be made.
 3. Configure systems and processes so that legal/birth name is accessible only to University employees that have a legitimate business need for such access.
 - a. Continue use of Banner as an official record that must contain legal name, and configure Banner to intake preferred name and display preferred name as appropriate.
 4. Begin implementation in earnest and prioritize systems that have the most direct and significant impact on students (i.e. BbLearn and Active Directory).
 5. Update University of Idaho's policies, guidelines, and data handling procedures to support use of preferred name wherever possible. This should include updates to the non-discrimination policy.
 6. If changes allowing preferred name are implemented, avoid reverting those changes to prevent further harm and frustration to students, faculty, staff, alumni, and affiliates.

Impacts:

This section describes the known potential impacts of allowing preferred name utilization across the University of Idaho. Impacts are explicitly related to processes, systems, or other business functions.

Systems & Processes Already Using Preferred Name

Some departments within the University of Idaho previously updated their processes to use preferred names when interacting and communicating with students, alumni, faculty, and/or staff.

- Admissions:
 - General Admissions and Graduate Admissions applications capture preferred name
 - Graduate Admissions uses preferred name in Slate for direct & bulk emails to students
- Faculty:
 - Most faculty handle class interactions using preferred names for all students
- Human Resources:
 - HR staff capture preferred first and last names for employees via PPAIDEN in Banner. According to Mindi Wood, these names are displayed in Campus Directory, BbLearn/BlackBoard, and Outlook.
- Information Technology Services:
 - VandalCard Office (VCO)
 - Email (name displayed, not the email address itself)
- LGBTQA Office:

- Forms in Qualtrics (collect “legal name” and “name”)
- Most documentation, systems, and interactions with students, employees, etc.
- Title IX:
 - Simplicity Advocate GME (Grievance Management Edition) – names are populated from a Banner pull. Title IX staff correct it to preferred name in Simplicity Advocate.
 - All communications, letters, emails, and case files within Title IX do not require use of a legal name. This is partially in an effort to avoid more discrimination claims.
- University Communications & Marketing:
 - UCM uses CRM systems from Advancement (Advance CRM), International Programs Office, and College of Law to pull names; some may already use preferred name.

Systems & Processes to Update if Preferred Name is Implemented

- Admissions:
 - Stellant – document imaging; currently has Vandal Number, legal first & legal last names
 - Note – official personnel documents for staff and faculty should continue using legal name, including if they are in Stellant.
 - General Admission office communications, including data feeds and mail merge
 - Graduate Admissions reports currently include both legal and preferred name; could switch to only use preferred.
 - General Admission offer letter.
- Faculty:
 - BbLearn, VandalStar, grade submission system, email, class lists, library accounts, ID cards, and lists/reports created by Melissa Goodwin
 - Specific to College of Law – seating charts (created by faculty assistants using VandalWeb data), ACES2 in admissions, and National Merit Scholars lists
- Finance:
 - Interactions with students, including in person, via email, and via phone
 - Nightly “CRON” reports should use the name that Finance sees on screen when interacting with students – consider altering reports to reference preferred name
- Information Technology Services:
 - All data feeds from the Banner Student Information System that provide name information to other systems
 - Campus Directory, Library system, BbLearn, Chrome River, StarRez (Housing), POLYA (math lab system)
 - Reports in Argos, Form Fusion, and Banner (canned and custom). Most concerned with Student Accounts and Financial aid, due to number of reports they use.
- Registrar:
 - All data feeds from the Banner Student Information System that provide name information to other systems
 - Certified diplomas (aka “apostille diplomas”)
 - Reports in Argos, Form Fusion, and Banner (canned and custom). This could be in the hundreds, if not thousands
- Title IX:
 - Case Management System, Advocate Simplicity – Grievance Management Edition, which currently receives legal name from Banner; update to provide preferred name instead
- University Communications & Marketing:

- Some web forms that UCM manages can likely be updated to use preferred name; each would need to be reviewed for a determination to be made.

Systems & Processes that Require Continued Use of Legal Name

- Admissions:
 - Banner-related items, like student records
 - Visa system has an optional preferred name field; legal name field will still be required
 - Immigration documents require legal name
- Faculty:
 - Teaching Assistant contracts and official TA communications from U of I
 - Faculty need legal name for grants (and possibly IRBs), which can be tied to the individual's Social Security Number
 - Grants and other legal documents (for all relevant faculty)
- Finance:
 - Chrome River
 - Tax Navigator and/or Sprintax
 - Heartland ECSI (aka Salnet) – used to process Perkins award, institutional loans/awards
 - Tax documents (1098-T, 1042-S), loan documentation, Promissory notes, 3rd party billing
 - Direct deposit and physical checks (e.g. student refunds)
 - Collections process (Finance reports SSN and legal name)
- Financial Aid:
 - Common Origination Disbursement (COD) – legal name needed to send and receive data
 - National Student Loan Database System (NSLDS) + National Student Clearinghouse (NSC)
 - Elm, the 3rd party system for private loans (Financial Aid receives info from Elm)
 - State Scholarship portal
 - FASFA and FSA (the system used for FASFA)
 - Financial Award offer letters (in Banner)
 - Applicant lists sent to colleges within U of I (should remain based on FASFA name)
- Human Resources:
 - EPAF, "Termination" report, and "All Employee" report
 - Note – the reports can be setup to use preferred name as an additional field when appropriate
 - Employment forms, including W-2, W-4, I-9s, employment offers/letters
 - Purchasing Card issuance and updates
 - Communications related to unemployment
 - In Banner, the PEAEMPL field – used for W-2s, paychecks, and benefits
- Information Technology Services:
 - Synapsis – international student database
 - Banner forms and reports for Accounts Payable and Payroll
 - Data feeds from Banner to job listing system
 - State of Idaho New Hires file – managed by HR, outbound
- LGBTQA Office:
 - Employment and scholarship items (e.g. work study documentation, EPAF)
- Registrar:
 - Official Transcript
 - Diploma for international students and certified copies
- University Communications & Marketing:

- Some web forms that UCM manages will likely need to use legal name; each would need to be reviewed for a determination to be made.

Benefits:

Benefits to Students, Faculty, and Staff

- Faculty – this change would reduce obstacles to getting to know students, thereby improving engagement and making it easier to support students and treat them with equality. This change also recognizes the humanity and personhood of more students.
- Students – according to various studies and supported by student interviews, this change would increase retention for transgender students and have a positive effect on the mental health for students. Students stated that this change would, “acknowledge the humanness of trans students”, and would benefit all students. Students’ campus experience would be better, classes would be easier, trans students wouldn’t frequently be outed as trans, more students would likely come out as trans and use preferred name. College has the capacity to support and empower these students (who already show signs of resilience, in that they have completed high school and enrolled in college), thus enhancing academic and personal success. For students who were not out as trans in high school, college can play an important role in facilitating gender identity exploration—such as by providing the supports and resources needed to allow students to navigate this process while staying in college.
- Financial Aid – improved customer service, due to enhanced ability to use preferred name for interactions with financial aid recipients.
- Human Resources – this would be an improvement, since they could better accommodate the requests they already receive for preferred name use.
- Registrar - improved customer service, due to enhanced ability to use preferred name for interactions with financial aid recipients.
- Title IX – change would improve engagement with Title IX office and improve their customer service.
- University Communications & Marketing – this change would have a positive impact for recipients of communications that include their name, and for individuals that fill out forms online (controlled by UCM, but used by most departments/colleges). Using preferred names would be helpful because customers will feel more welcome and respected.

Benefits to University of Idaho

- Admissions – this would set U of I Admissions apart from other institutions and would help their interactions with prospective students, since they focus a lot on relationship building.
- Faculty – retention and recruitment would be improved by using peoples’ preferred names, due to increased participation in class and engagement in the learning process.
- LGBTQA Office – recruitment and retention of trans students would improve.

Risks:

Risks of implementing preferred name utilization

- University-wide (general):
 - Potential for sending communications that use preferred name to family members or guardians against a student’s wishes.

- Communicate to faculty and staff which things are mandated vs. optional; clarify what is expected of employees and how this change might impact their workload.
- Communications must be handled appropriately – should include input from trans students and the Chief Diversity Officer to ensure communications aren't offensive.

Risks of not implementing preferred name utilization

- Admissions and Graduate Admissions:
 - Likely to offend or alienate potential students, since they can't refer to the student how the student refers to themselves.
 - Has potential to form bad relationships and is detrimental to ability to recruit a diverse student body. Faculty also experience this when first contacting prospective students.
- Faculty:
 - This is a life or death issue for some individuals – not implementing preferred names will continue to negatively impact the health of students, faculty, and staff.
 - Continued use of workarounds by faculty to use preferred names for courses. Due to a variety of systems being used, this implies significant FERPA concerns. These workarounds result in significant worktime lost for both employees and students.
 - Examples: collecting coursework outside BbLearn, creation of class rosters in Google, Qualtrics, etc.; sites other than BbLearn for class discussion boards.
 - Reduced education quality for students due to workarounds
 - Work hours lost because of time dedicated to creating aforementioned workarounds
 - Difficulty recording attendance and entering grades in BbLearn or VandalWeb
 - Not allowing preferred names violates the mission, values, and principles of the University of Idaho, which promises “respect”, “integrity”, and “diversity” – calling people by the correct name is central to all of these goals.
- Human Resources:
 - Not allowing preferred names in HR would cause significant issues – if someone insists their name must be displayed a certain way, they wouldn't be able to meet that need. For example, some staff names have been entered in PPAIDEN as a preferred name, not as a legal name. Preventing this moving forward could result in discrimination claims, since HR has accommodated preferred names previously.
- Students:
 - Risk of decreased safety and stability for students due to gender identity.
 - Responsibility is put on students to contact their faculty at the start of every semester and notify them of preferred name – potential to out trans and non-binary students.
 - Perception that the University of Idaho does not care about trans students, their wellbeing, their mental health, their physical safety, or the negative treatment trans students receive due to lack of supportive policies and processes.
 - Perception that University of Idaho is “behind the times”, since both Idaho State University and North Idaho College (along with many others throughout the country) already allow students to set their preferred name.
- LGBTQA Office:
 - Often, faculty do not take seriously students' requests to use their affirmed (as opposed to birth or legal) name, creating anxiety and discomfort for trans students.
 - Higher rates of drop-out and stop-out from trans students. National data on first-year college or university students suggests that, compared to national norms, trans first year students rate themselves lower in the areas of physical health, social self-confidence,

leadership ability, and academic self-concept, a composite that integrates respondents' self-rated academic ability, mathematical ability, intellectual self-confidence, and drive to achieve.

- The U.S. Transgender Survey (USTS), a survey of over 27,000 trans adults, found that 24% of respondents who were out as or perceived as trans in college reported being verbally, physically, or sexually harassed at that time—with 16% of those who experienced harassment having left college because of the harassment.
- The National Transgender Discrimination Survey (NTDS), which surveyed nearly 6,500 trans respondents, found that individuals attending college, graduate school, professional school, or technical school reported high rates of negative treatment by students, teachers and staff, including harassment and bullying (35%).
- Campuses are often seen as hostile environments for trans students. In a study of 152 trans college students, Woodford, Joslin, Pitcher, and Renn (2017) found that the frequency of experiencing select trans environmental microaggressions (e.g., not having access to comfortable bathrooms as a trans person) was associated with increased risk of negative academic outcomes.
- Systems are in place inherently on our campus that create unwelcoming and hostile environments for our transgender students. (e.g. physical structures like sex-segregated bathrooms, official University records, policies, curricula, classroom practices, etc.)
- A study by Dugan et al. (2012), which compared trans-identified students, cisgender LGB students, and cisgender heterosexual students, found that the trans students viewed the climate on their campuses as more hostile (i.e., less tolerant and inclusive of them as trans people), and also reported a lower sense of belonging (i.e., acceptance and integration) within their campus community.
- Trans students are arriving to our campus with trauma and victimization from their high school experiences – higher education has the capacity to reinforce the gendered and transphobic treatment that many students have already experienced in school and society, leading to poor academic and psychosocial outcomes.
- Title IX:
 - Due to current practice of allowing individuals to use a name other than their legal first name for some University processes (e.g. nickname, middle name), it's possible that not allowing trans or non-binary students to use their "preferred name" is discriminatory.
 - Impact to foreign students of University employees giving them a nickname when it isn't requested – may be discriminatory towards race or country of origin. This could be avoided if students provide their own nickname or phonetic name via preferred name.
 - Currently, some Title IX notifications are automatically sent using legal name, harming the relationship with that individual and reducing engagement with Title IX office.
- University Communications & Marketing:
 - Lack of a consistent, university-wide use of preferred names is detrimental to UCM's work. Example: calling undergraduate students by their preferred name but failing to continue using preferred name once they become alumni or go to Grad/Law schools.