University of Idaho
2012-2013 FACULTY SENATE AGENDA

Meeting #9

3:30 p.m. - Tuesday, October 23, 2012
Brink Hall Faculty Lounge
IWC Room 390 – Boise
213 – Coeur d’Alene
TAB 321B IF4 – Idaho Falls

Order of Business

I. Call to Order.

II. Minutes.
   - Minutes of the 2012-13 Faculty Senate Meeting #8, October 16, 2012

III. Chair’s Report.

IV. Provost’s Report.

V. Other Announcements and Communications.
   - Finance and Administration Updates – (Smith/Dorschel)
     o Parking Services – new administrative reporting
     o Process/continuous improvement
     o Public Safety & Security
   - Ombuds Annual Report (Schreiber)

VI. Committee Reports.

Faculty Affairs
   - FS-13-009:  FSH 3820 – Ombuds Office
President’s Athletic Advisory Council (Hasko)
Teaching and Advising Committee (Anderson)
University Curriculum Committee
   - FS-13-010 (UCC-13-018):  Law/Science Concurrent JD/PSM Degree (Boll)

VII. Special Orders.

VIII. Unfinished Business and General Orders.

IX. New Business.

X. Adjournment.

Professor Kenton Bird, Chair 2012-2013, Faculty Senate

Attachments:  Minutes of 2012-2013 FS Meeting #8
Safety Handouts
Ombuds Annual Report
FS-13-009; FS-13-010
Present: Baker (w/o vote), Bathurst, Bird (Chair), Budwig (Boise), Cobb, Eckwright (w/o vote), Flores, Frey, Goddard, Hartzell, Hasko, Hopper, Karsky, Kennelly, Kitchel, Manic (Idaho Falls), Miller, Morra, Pendegraft, Qualls, Safaii, Strawn, Stuntzner (Coeur d'Alene), Teal, Ytreberg Absent: Aiken, Baillargeon, Ostrom, Smith

Guests: 11

A quorum being present, Senate Chair Bird called the meeting to order at 3:30PM.

Minutes: Secretary Eckwright offered a correction to the last bulleted item on p.5 of the minutes which reads “financial incentives for playing at that level will increase as the BCS goes to a 14 game playoff after 2014” but should read “4-team playoff.” It was moved and seconded (Goddard, Kitchel) to approve the corrected minutes of meeting #7. Motion carried.

Chair’s Report. The Chair reported on the following items:

- Selena Grace, chief academic officer for the Idaho State Board of Education (SBOE), was originally scheduled for today’s meeting but we have rescheduled her visit for Tuesday, February 12, 2013. Today’s agenda is very full and the amount of material she will be presenting requires more time than we could provide today.
- The new Brink Hall lounge configuration will be tested at next week’s senate meeting. We plan to align tables and chairs on the east side of the room to match as closely as possible the design submitted by the advisory committee. We welcome anyone who could come at 3:15PM to please help set-up the room.
- Guest speakers at next week’s senate meeting include:
  - Miranda Anderson, chair, teaching & advising committee;
  - Ron Smith, vice president, finance and administration;
  - Matt Dorschel, director, public safety and security, a new unit created this fall;
  - Ellen Schreiber, ombuds, will present the ombud’s office annual report.

Provost’s Report. Provost Baker reported on the following items:

- Campus safety committee recently sent out a request for annual safety reports from units, but there has been a low response rate from units. In the past these reports were requested in the spring, but the committee made the decision to request the reports in fall beginning with this year, so that safety issues could then be worked on throughout the year. This shift has resulted in a low response rate. Reminders to provide safety reports will be sent to the units – please be sure to respond.
- Selena Grace had planned to talk about the Complete College Idaho (CCI) conference, October 30-31 in Boise. There is limited travel funding available for faculty to attend this conference. SBOE adopted CCI to encourage K-12 students to succeed in a higher education environment. For more information: http://www.regonline.com/builder/site/Default.aspx?EventID=1126535

Chair Bird then introduced Professor Larry Forney, professor of biological sciences and director of the initiative for bioinformatics and evolutionary studies (IBEST). Forney briefly described IBEST:

- one of 3 level-three institutes created last year, the others are the aquaculture research institute (ARI) and Idaho water resources research institute (IWRRI);
- has an interdisciplinary focus on real-time evolution, which is a strategic theme area identified by President Nellis early in his tenure;
• faculty participating in IBEST are from the following colleges: science, engineering, agricultural and life sciences, natural resources, and letters, arts, and social sciences;
• IBEST is involved in a number of strategic collaborations across the country, including an alliance with the National Science Foundation’s (NSF) BEACON center for the study of evolution in action, headquartered at Michigan State University, with partners at North Carolina A&T State University, University of Idaho, University of Texas at Austin, and University of Washington;
• maintains 4 core facilities available to researchers institution-wide in genomics, computation, optical imaging, and mass spectrometry, each with about $2 million in infrastructure and state-of-the-art facilities.
• oversees the bioinformatics and computational biology (BCB) graduate program and the undergraduate biology and math program sponsored by NSF.
• IBEST was built on the foundation of a national institutes of health (NIH) center of biomedical research excellence grant that has been in existence at U-Idaho for about 10 years and has brought in over $21 million in the past 10 years;
• IBEST has just been notified that the third phase has been renewed for another $5 million;
• individual investigators have received an additional $6 million in awards and $3 million in expenditures this past FY, with most grants receiving full overhead;
• IBEST is in the midst of an annual review from an external review committee comprised of 4 distinguished scientists from across the country who will be in Moscow this week;
• other IBEST events scheduled for Thursday, October 18, include an overview presentation, science presentations and a poster session.

Chair Bird noted that there are no committee reports on the agenda but that senators or members of other university-level committees are invited to work with senate leadership to schedule committee reports for future senate meetings.

Chair Bird next introduced Rob Anderson, director of university support services (USS), and Dan Lawson, aquatics director, to speak about USS and to provide an explanation for the proposed fees at the swim center.
• USS is a unit within the division of finance and administration (DFA) and is responsible for operations ranging from stewardship to active management of events at the ASUI Kibbie Dome, Memorial Gym, PEB, swim center.
• The swim center was built in 1970 and is open to community, students, faculty and staff for competing, educating and recreating.
• Upkeep and maintenance for the swim center has cost more than $2 million in renovations since 2003.
• The swim center is open for swimming 96 hours per week.
• Spring 2012 attendance figures show U-Idaho students comprising 38% of swim center use, faculty/staff 11% and community users totaling 50% of overall use.
• Funding currently comes from student fees, $5 per semester for full-time students, community members who purchase recreational swim passes and community group use fees. The athletic department pays a facility charge when they host swim meets, but U-Idaho students who compete do not pay an additional charge since they pay for use through their fees.
• The swim center experienced a $19,000 budget shortfall last year and additional fees are needed in order to close the funding gap.
• Faculty and staff have not paid for swim center use in the past but now are being asked to “pay their fair share.”
• Proposed fees for faculty and staff to go into effect in January 2013: $150 for an annual pass; $85 for a semester pass; $45 for a 10-visit pass.
Mr. Anderson and Mr. Lawson responded to senators’ questions and comments as follows:

*How did you arrive at the figure of approximately 140 faculty and staff swim center users?* We asked people who use the pool to sign-in when they arrive and indicate whether they are faculty or staff, community pass holder or student.

*Is it your intention to charge a fee only to those faculty and staff who use the pool and not charge all faculty and staff?* Correct, the fee would be assessed to only those who use the pool.

*The university has been promoting the idea of faculty and staff being healthy and using the gym and other facilities. Could this be detrimental to those who are using the facilities now? Perhaps this is why there is no fee at this time?* We hope the proposed fees do not send that message, as we are trying to keep the fees very reasonable. The fairest way to pay for the swim center is to have those who use it, pay for it. Also, some believe that WSU provides facility use for free to faculty and staff, but that is not the case. Those using the core facilities at WSU pay $200/year.

*Some institutions, such as the University of Oregon, charge for use of the gym and include the swim center as part of that fee. When we impose swim center fees in addition to gym use fees, U-Idaho faculty and staff may have a sense of being double-charged. The student recreation center (SRC) is student-funded and other users pay to use the facility. The students at one time talked about building a “water-feature” but it was not intended to replace the swim center.*

*Have you given this presentation to the staff affairs committee?* No, but we would be happy to do so. (Senator Miller will relay this offer to the chair of the staff affairs committee.)

*Current fee structure requires 10,000 (students) to pay for it, whether they use the swim center or not. It makes sense that faculty and staff who use it should pay for it, too.*

*Your information shows that $11,000 is the amount lost from the “wellness dollars” program. Do you anticipate that 74 faculty and staff (just over half of the current 140 using the swim center) will purchase the annual pass at $150 each for a total of approximately $11,000?* Our deficit in this one area was $19,000 so this is a good “start” and we also are looking to cut back on expenses in order to break even. We would love to sell 200 or more passes. We inherited a very different pool, it was not in good shape regarding safety and other concerns, and we have put a lot of money into it. One of the first things we did was go to the students who doubled the fees to help us stem the “hemorrhaging.” Faculty and staff were not asked to pay fees for using the pool for a number of reasons: the building is not set up for card readers, there are multiple points of egress, and there may have been a political element, as well. We did receive $11,000 to help us balance our budget and then it went away. We feel that in fairness we now need to seek individual payment for the use of the pool.

*Maybe we need to charge $100 rather than $150 for annual passes?* We did a market study and found what a fair market price would be for the community. The $150 price is viewed as a benefit by the IRS and represents about a 20% reduction from the community price. IRS rules require that the fees we charge faculty and staff may not exceed a 20% reduction of the price charged to the community. Running swim centers costs exponentially more than what could be charged for pool use.

*Have we considered adding pool use to our wellness benefits?* (Guest Nikki Jones, benefits administration manager, responded to this question.) We have not talked about it and none of the benefits people were aware that this was not included. We will need to research it, which will take some time, and it will not be part of this year’s benefits changes.
Mr. Anderson concluded his remarks by highlighting USS campus and athletic events management services. This group has the talent and skills to successfully bring conferences and other events to U-Idaho. For example, we worked with faculty to bring 1200 attendees to the Evolution Conference in Moscow in 2009. If you want to make a bid to bring a conference to campus, give us a call and we can help you put together a bid and the event. Please send comments and questions relating to USS to Rob Anderson andersonr@uidaho.edu

Chair Bird reminded senators that the implementation of the swim center fees do not require a vote by senators as this is not a policy that is within senate’s purview. A senator suggested that senate should have a voice in decisions made regarding the implementation of fees since swim center fees are addressed in the Administrative Procedures Manual (APM). He noted that the fees first were implemented some months ago but the administration rescinded the fees for this semester after receiving some complaints. The senator asked if this ought to come to senate for a vote since information about swim center fees resides in the APM and changes to the APM properly come to senate. Eckwright explained that all Faculty-Staff Handbook changes require a vote at senate but that APM changes come to senate as informational items only. The senator also alluded to an email which could shed more light on the matter; Chair Bird asked the senator to forward the message to the Chair.

Chair Bird next introduced Greg Walters, executive director of human resources. Chair Bird reminded senators that senate passed a resolution regarding a benefits survey in 2009 and resolutions remain “on the books” until there is a response from the agency. The survey was requested because of a perceived need for broader input into the structure of the benefits plan. Chair Bird directed senators’ attention to correspondence from Mr. Walters in which he indicates that his office does not plan to conduct a benefits’ survey at this time.

Mr. Walters introduced the members of the Benefits Advisory Group (BAG): Mark McGuire, Karrie May, Sue Clark and Niki Jones. Mr. Walters noted that he has been working with benefits advisory groups for 16 years and this particular group is the most knowledgeable and invested group that he has worked with, and that they represent U-Idaho very well. BAG offered the following information about the group:

- BAG has 16-18 members representing various demographics including: staff representatives, faculty representatives at assistant, associate and full professor ranks, married and unmarried representatives with and without families, the ombuds and so on.
- Faculty senate and the staff affairs committee nominate individuals to serve on BAG with final selections made by Ron Smith, vice president for finance and administration.
- A BAG member filling a faculty “slot” is retiring after this year and interested faculty are invited to request to serve on this committee.
- Members are non-partisan, with no term limits as there is a steep learning curve.
- BAG meetings are not open to the public.

BAG members provided the following information regarding benefits and benefits services:

- Benefits services receives between 5-40 emails per day from employees with questions about benefits.
- Benefit services now have a call center handling from 2-600 calls per month.
- A few years ago the new cafeteria-style benefits plan resulted in maximum confusion and many people let them know about the problems with the plan.
- In fall 2011 benefits services brought in U-Idaho employees selected at random to form a focus group in order to provide feedback.
- Benefits plan changes for 2013 include the addition of allergy injections, treatment for morbid obesity and expanded coverage for women’s health.
• Retiree plan covers about 900 retirees; changes to the retiree plan include rate increases of 5% and a group Medicare part D plan.
• New pharmacy benefit provider, CVS Caremart; after January 1, 2013, Walgreen’s will be included again.
• Dental and vision plans have no changes.
• There will be some rate changes for medical benefits.
• New eligibility group “Other eligible adult.”
• Benefits services staff review claims’ reports to see if plans are being utilized by employees.

BAG members responded to the following questions and comments from senators:

It is respectfully suggested that benefits services reconsider the way BAG is currently constituted as some faculty view it as very insular. Thank you.

The Explanation of Benefits (EOB) from Blue Cross is a particular source of irritation. There’s a lack of transparency in their explanations and it would save a great deal of time if Blue Cross would provide more information in their EOBs. I agree, Blue Cross needs to work on their EOBs, but there are a lot of rules and regulations regarding what must be included on EOBs. All health care providers and insurance companies currently are working on improving them.

Family coverage costs are increasing by about $12.50 per pay period and depending upon the plan, costs increases range from 8% to 22.5%. Are these increases due to more coverage or is this just an increase in health care costs? Both. We have additional plan benefits, additional people coming into the plan and health care costs are rising. A significant portion of the increase is the addition of the “other eligible adult” and that cost was spread out across all plan participants.

Could you explain the difference in the increases between the retirees plan and the active employees plan? Retirees’ plan costs are rising 5% and their rates tend to go up incrementally across the board. Retiree plans are somewhat different in what is covered and not covered; and there are not eligibility changes. For active employees the rates are determined by how the PPO plan performs versus the high deductible (HD) plan.

Are we fairly healthy as a community? Have you seen an increase or decrease in claims? Our per person claims are high but we have not seen a huge increase (because they were already high). We have seen some large claims this year, but the wellness benefit use is high, too, which is good.

Why is the increase in the HD plan greater than the increase in the standard PPO? Each year we work with an actuary. We look at the plans and estimate what the costs will be and then set rates accordingly. Last year we estimated the HD plan would cost less than it did and we estimated the standard PPO would cost more than it did, so this year we are realigning those costs.

If costs are overestimated do we take that into account next year? Absolutely, but we also need to consider other factors.

Bariatric surgery costs are projected to be $30-40,000. What are the costs to the plan? In the long-term we believe bariatric surgery will be cost neutral because people who have the surgery are able to discontinue medications and eliminate other health problems. Anyone interested in the surgery must use a Blue Cross Center of Excellence for Bariatric Surgery in order to be covered by the plan.
Are you able to provide a dollar breakdown for plan increases by categories, e.g., other eligible adult, additional services, and general health care cost increases? No, it is not something we produce at that level of detail.

Chair Bird thanked BAG members for their presentation and added that open enrollment is October 22-November 9, 2012. For more information: http://www.uidaho.edu/benefits/annual-enrollment-2013

**FS-13-008: APM 50.16 – Background Checks.** Chair Bird invited Mr. Walters to briefly discuss changes regarding mandatory background check procedures as amended in the APM. This item was discussed at senate on September 25 and at that time we were waiting for a few final changes from the General Counsel’s office, which have now been incorporated into these procedures. Changes to the APM do not require a vote by senate and this is presented as an informational item only. A senator pointed out that the language in 50.16 states that “UI will conduct criminal background checks on current employees as required for reclassifications and promotions.” The senator asked Mr. Walters if faculty promotions will require background checks, for example, when a faculty member is promoted in rank from assistant professor to associate professor or from associate professor to full professor? Mr. Walters replied “No” [i.e., background checks will not be required for faculty promotions]. Mr. Walters further explained that “reclassification” pertains to classified and non-faculty-exempt staff and that “promotion” is a term used for non-faculty-exempt staff because there is no “classification” system for this category of employee at this time. The senator then asked Mr. Walters for his assurance that this does not apply to faculty. Mr. Walters responded “Correct.” Another senator asked whether this applied to in-house searches and Mr. Walters replied “Yes” if the university conducts only an internal search this would apply to that search. This change to the APM has gone into effect.

**Adjournment:** It was moved and seconded (Morra, Strawn) to adjourn at 4:54PM. Motion carried.

Respectfully submitted,

Gail Z. Eckwright
Faculty Secretary and Secretary to Faculty Senate
Public Safety at the University of Idaho

Overview of emergency management
The university maintains a university-wide web-based emergency management plan
http://www.uidaho.edu/emergencymanagement

The purpose of emergency management is to mitigate, prepare, respond, and recover from the hazards that may adversely impact students, employees, and visitors. Our mission is to coordinate the activities of various departments responsible for continued operations during disasters, coordinate resources, communicate with local, state, and federal agencies, and provide education and training. (See emergency management handout/website.)

Overview of security management
http://www.uidaho.edu/security

The university’s security program is designed to protect people--students, parents, staff, faculty, and visitors--and assets of the university. The university security program works to create a sense that the campus is welcoming and safe.

<table>
<thead>
<tr>
<th>Elements of Public Safety</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td><strong>PERSONAL SECURITY</strong></td>
<td></td>
</tr>
<tr>
<td>Awareness Training</td>
<td>Programs conducted both by various university offices, including Dean of Students and Department of Public Safety &amp; Security, and by MPD campus officers. Topics include, but are not limited to, violence in the workplace, sexual assault, theft, and domestic violence.</td>
</tr>
<tr>
<td>Multi-modal Notification Systems</td>
<td>University is capable of delivering campus-wide notifications through a variety of modes including e-mail, text messages, smart classroom technology, and press releases.</td>
</tr>
<tr>
<td>Security Officers (AlliedBarton) Mobile Dispatch Number</td>
<td>Non-sworn officers who enforce University policy and promote safety. Responsibilities include, but are not limited to 24-hour foot patrols; checking and circulating throughout buildings; observing and reporting hazardous conditions or security violations; responding to safety alarms; providing safe walk services; reducing vandalism; and establishing and maintaining a 24-hour information and assistance presence. Security services staff are not armed.</td>
</tr>
<tr>
<td>Cell – Dial all 10 digits (208) 874-7550</td>
<td></td>
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<tr>
<td>Safe Walks and Jump Starts in evenings</td>
<td></td>
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<tr>
<td>Law Enforcement Officers (Moscow Police)</td>
<td>Sworn officers who enforce the law of the local municipality. Services include community policing; campus sub-station during specified hours; car patrols; responding to criminal activity reports and incidents; investigation and case preparation; and work in areas related to, but not necessarily managed by, the University, such as Greek houses. Police are authorized to be armed and are trained to provide tactical response to incidents.</td>
</tr>
<tr>
<td>Event Security</td>
<td>Kibbie Dome administers games and events in the Dome using a combination of security and law enforcement officers. Kibbie recently installed a text message system to give patrons an opportunity to report issues. Large events (200+) at which alcohol is served must complete a security plan.</td>
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## Elements of Public Safety continued

### PERSONAL SECURITY continued

| Lighting | Facilities maintains a lighting system plan and lighting is extended periodically. |
| Training and Hiring | Features include conducting background checks for sensitive positions; publishing and enforcing codes of conduct for faculty, staff and students; providing appropriate training for supervisors in recognizing and responding to behaviors of concern (see also Threat Assessment and Management); providing appropriate training for all employees regarding suspicious behavior; and providing appropriate referrals to counseling (EAP). |

### Threat Assessment and Management (TAM) Group

| Standing | Ad hoc |
| Student Affairs | Disability |
| HR | IPO |
| Counsel | Involved faculty/staff |
| Public Safety | Communications |
| Counseling | Situational experts |
| Ombuds | External experts |

Begun in 2009, TAM is one of the University's mechanisms for identifying, assessing and managing "behavior of concern" that is manifested by any student, staff or faculty. The TAM works with other university units and groups to assist the university community with behavior of concern. (Student issues are referred first to Student Affairs, who use TAM assistance when appropriate.) TAM members have trained as a group and follow the Deisinger/Randazzo model. TAM intervenes at any time as needed, generally at a "level 3" in the model's behavior continuum (1 to 5 scale).

### RESOURCES FOR BEHAVIOR OF CONCERN

| Vandal Care | Ombuds |
| Bias Incident Team (forming) | Disciplinary procedures, up to and including termination (HR) |
| Counseling Center | Risk (APM 95.33 Reporting Incidents of Violent or Threatening Behavior) |
| Accommodations (Disability Services) | Clery Reports and Timely Warnings |
| Student Code of Conduct and Judicial Actions | No Trespass Orders |
| Human Resources | Criminal Investigations and Law Enforcement (MPD) |
| Hotline | Threat Assessment and Management Group (TAM) |
| EAP and other Psychiatric Benefits (employees) | http://www.uidaho.edu/emergencymanagement/behavior |
| EAP Consultations for Senior Administrators | |

### Travel

Employee and student travelers are encouraged to review their personal medical benefits and any travel policies available to them. Review policies for extent of medical, political and natural hazard response from personal insurance company.

### ASSET SECURITY

| Property | University maintains policies for access control of keys, doors, windows, alarms, and cameras. |
| Monies | Focus is on effectiveness of controls and adequate separation of duties. DFA and the Budget Office provide oversight of their respective areas. |
| ITS | Focus is on adequate protection of university data and computing capacity through access controls, computer use policy, and sensitive personal information (SPI) controls. Processes are controlled both by ITS and by computer services residing in colleges and divisions. |
Unit Safety Program. Unit administrators are required to ensure that a unit safety program is developed and implemented using the template provided by EHS.

Unit Safety Program Elements. The Unit Safety Program is comprised of the following nine elements:

- Policy and Procedures
- Unit Safety Committee
- Job Hazard Assessment
- Safety Training
- Accident Reporting and Investigation
- Inspections
- Emergency Response Plans
- Vehicle Safety and Use
- Hazardous Materials Use

Further information, guidance, resources and tools to assist in the development of a unit safety program are available at the EHS website.

Unit Safety Program Assessment. Unit administrators shall ensure that their safety program is reviewed annually to determine the progress made in reaching the goals described in the unit safety program template. To accomplish this, a Unit Safety Program Assessment Checklist is available.

(Administrative Procedures Manual, Chapter 35.32.D)

Responsibilities:

Obligations. Administrators, managers and supervisors are responsible for developing and implementing safe work practices, promoting safety, and setting the example for others. All employees are expected to adhere to safe operating work practices and are encouraged to provide expertise and offer ideas to make safety a part of the job. All members of the University community are expected to continuously promote safety awareness, maintain property and equipment in safe operating condition, and comply with APM Chapter 35 (Environmental Health & Safety).

(Administrative Procedures Manual, Chapter 35.32.A-2)
Supervisor Responsibilities. Deans, directors, department heads, faculty members, staff and other supervisory personnel are responsible for providing safe environments and operations under their control (including, but not limited to, work, classroom, laboratory, and field-trip activities), and are required to ensure that all reasonable and necessary precautions are taken to prevent accidents and to preserve the life and health of the employees, instructors, students and others under their supervision. Supervisors are responsible for ensuring that employees under their supervision are adequately trained, equipped, monitored, evaluated, and guided as appropriate to ensure compliance with established safety policies, standards, and procedures. Annual performance evaluations of supervisors shall reflect performance in promoting safe work practices.

(Administrative Procedures Manual, Chapter 35.32.A-4)

Supervisor Responsibilities. Deans, directors, department heads, and other supervisory personnel are responsible to ensure that each person reporting to them has the training and experience necessary to conduct assigned work activities in a safe and prudent manner. Employees must be furnished with appropriate safety equipment, devices, and safeguards and are required to adopt and use the practices, methods, operations, and processes that are provided to render the workplace safe.

(Administrative Procedures Manual, Chapter 35.33.A-2.a)

Training
Providing employees with the knowledge and information on how to perform their jobs safely is a key component in any environmental health and safety program. Supervisors need to ensure their employees have received the appropriate training and that this training has been documented.

• NetLearning@uidaho - This is the University’s on-line learning management system. Through this system, supervisors and employees can access training, create job training profiles, and document training.
  o A User Guide for Supervisors (available on-line at the Professional Development and Learning website)
  o Job training profiles
  o On-line safety orientation course, “Safety Matters”

Providing Safety Equipment
In order to know what personal protective and safety equipment are needed, you must assess the hazards of the job. Are the hazards health related (chemical, biological, or radioactive) or physical related (mechanical, electrical, pressure, etc.)?

• Personal protective equipment
  o Head protection - hard hats, sun protection
  o Safety eyewear - glasses, goggles, face shields
  o Hearing protection
  o Respiratory protection
  o Gloves - general protection, chemical/biological resistance, cut/abrasion protection
  o Clothing - coveralls, lab coat, appropriate clothing in laboratories, cold protection
  o Feet - steel-toe shoes/boots, puncture protection, appropriate footwear in laboratories
• Safety equipment
  o Guards on tools
  o Fume hoods
  o Safety showers/eye wash stations
  o Fire extinguishers
  o Fall protection
  o Lockout/tagout
  o Appropriate tools

• Ergonomics
  o Computer use
  o Work practices

Once hazards have been identified and safeguards have been put in place, it is the responsibility of the supervisor to enforce the use of personal protective equipment, the use of safety equipment, and that safe work practices are being followed.

Injury/Accident Reporting
Of course, prevention of injury to our employees is our primary concern. If an accident does occur, supervisors will need to make sure employees seek medical attention if necessary, complete the appropriate paperwork, and review the circumstances of the accident to determine the cause and how to prevent the accident in the future.

• Workers compensation
  o Claims - follow instructions on the EHS website
  o Supervisor’s form
  o Annual report

• Accident investigation and reporting
  o Reporting of near misses by employees
  o Determining the root cause of the accident
  o “Lessons Learned” from the accident
  o Reporting - follow instructions on the EHS website and in the APM

• Job Hazard Analysis

Hazardous Materials
Hazardous material use, storage and disposal requires careful attention to safe work practices and compliance with federal, state and local rules and regulations

• Use of chemicals
  o Laboratory Safety Plan
  o Material Safety Data Sheet (MSDS)
  o Hazardous waste disposal and training

• Use of radioactive materials and x-ray equipment
  o Radiation Safety Committee
  o Radiation Safety Manual
• Use of biohazardous materials
  o Office of Research & Economic Development
  o Institutional Biosafety Committee (IBC)
  o Application forms and manuals

Committees

• Unit safety committees
• University Safety & Loss Control Committee
• Radiation Safety Committee
• Institutional Biosafety Committee

Resources

• “Safety Matters” safety orientation pamphlet
• List of EHS services
• EHS website: www.uidaho.edu/ehs
• Administrative Procedures Manual, Chapter 35
OVERVIEW OF COUNSELING and BEHAVIOR of CONCERN SERVICES

The university offers a wide variety of services for faculty, staff and students. Some of the major services are listed on the FRONT of this sheet. Websites and phones are included; check both as they may change over time. See BACK of this sheet for more ideas on other possible services.

<table>
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<tr>
<th>EMERGENCIES</th>
<th>Escalating, serious, life threatening—911—Summons police and fire Moscow campus security mobile phone—dial all 10 digits (208) 874-7550—Safe Walks, jump starts University on-call cell (208) 885-7054—engage university Response and Executive groups</th>
</tr>
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<tbody>
<tr>
<td>FACULTY &amp; STAFF</td>
<td>Employee Assistance Plan Website includes tip sheets for working with difficult people, promoting personal growth, engaging in rest and relaxation, and more. <a href="http://www.uidaho.edu/benefits/core-benefits/employeeassistanceplan">http://www.uidaho.edu/benefits/core-benefits/employeeassistanceplan</a> (800) 999-1077 Crisis line 24/7 (800) 833-3031</td>
</tr>
<tr>
<td>STUDENTS</td>
<td>Counseling Students may call or stop by the Counseling and Testing Center to schedule an appointment. Crisis appointments are available by walk-in or calling to arrange a time. <a href="http://www.uidaho.edu/ctc">http://www.uidaho.edu/ctc</a> (208) 885-6716 VandalCare The Dean of Students office can be a resource to help you with students exhibiting behavior of concern, whether it is disruptive, depressive, suicidal, or grief and loss. Access additional information here. <a href="http://www.uidaho.edu/studentaffairs/Faculty/vandalcare">http://www.uidaho.edu/studentaffairs/Faculty/vandalcare</a> (208) 885-6757</td>
</tr>
<tr>
<td>EVERYONE</td>
<td>University Department of Public Safety &amp; Security Discuss emerging situations or request training <a href="http://www.uidaho.edu/emergencymanagement/training">http://www.uidaho.edu/emergencymanagement/training</a> (208) 885-2254 Ombuds (208)-885-7668 The Ombuds Office provides a confidential, impartial, informal and independent place to discuss university-related concerns, access information, clarify policies and procedures, discuss response options and obtain problem-solving assistance. <a href="http://www.uidaho.edu/ombuds">http://www.uidaho.edu/ombuds</a> Hotline (Confidential) “Reportable activities of special concern are fraud, waste, and abuse, as well as harassment and bias incidents that impact the well-being of individuals within our community and our stewardship responsibilities.” <a href="http://www.uidaho.edu/internalaudit/confidential-hotline">http://www.uidaho.edu/internalaudit/confidential-hotline</a> 1-800-775-1056 (24/7)</td>
</tr>
</tbody>
</table>
### RESOURCES FOR BEHAVIOR OF CONCERN

<table>
<thead>
<tr>
<th><strong>Dean of Students Office</strong></th>
<th><a href="http://www.uidaho.edu/dos">http://www.uidaho.edu/dos</a></th>
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<tbody>
<tr>
<td></td>
<td>Vandal Care</td>
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<tr>
<td></td>
<td>Student code of conduct and judicial actions</td>
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<td></td>
<td>Violence Prevention (Sexual Assault)</td>
</tr>
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<td></td>
<td><a href="http://www.uidaho.edu/DOS/vpp">http://www.uidaho.edu/DOS/vpp</a></td>
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<tr>
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<td>Women’s Center</td>
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<tr>
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<td><a href="http://www.uidaho.edu/studentaffairs/womenscenter">http://www.uidaho.edu/studentaffairs/womenscenter</a></td>
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<tr>
<td></td>
<td>Accommodations (Disability Services)</td>
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<td><a href="http://www.uidaho.edu/studentaffairs/taap">http://www.uidaho.edu/studentaffairs/taap</a></td>
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</table>

<table>
<thead>
<tr>
<th><strong>Human Resources</strong></th>
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<tr>
<td></td>
<td>Disciplinary procedures, up to and including termination (HR)</td>
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<tr>
<td></td>
<td>Employee Assistance Program (EAP) and other psychiatric benefits (employees)</td>
</tr>
<tr>
<td></td>
<td>EAP consultations for senior administrators</td>
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</table>

| **Bias Incident Team** | [http://www.uidaho.edu/diversityandhumanrights](http://www.uidaho.edu/diversityandhumanrights) |

| **Counseling Center** | [http://www.uidaho.edu/ctc](http://www.uidaho.edu/ctc) |

| **Hotline (Internal Audit)** | [http://www.uidaho.edu/internalaudit/confidential-hotline](http://www.uidaho.edu/internalaudit/confidential-hotline) |

| **Ombuds** | [http://www.uidaho.edu/ombuds](http://www.uidaho.edu/ombuds) |
What can Risk Management do for You

November 2, 2012
By
Department of Public Safety and Security
Risk Management & Insurance Department
Keith A Goodenough, Risk Manager
www.uidaho.edu/risk
Identify exposures relevant to all U of I operations

- To protect the Students, Faculty, Staff, Board of Regents and the State Board of Education
- To protect the Balance Sheet, Endowments and Donations to U of I
- Statewide, Nationally and Globally
- Assessing Risk for all Departments, Vendors, 3rd party Users and Contractors when engaging on behalf of U of I, on and off premises
- Providing the proper Risk Transfer Programs as to Risk appetite and cost
- Developing new Insurance products and programs to meet the need of the ever changing market, exposures and rates
- Work with Stakeholders from all Departments to prevent, forecast and understand problem associated with Risk
- Work with the State of Idaho RM and Board of Education to bring unique and helpful approach to Risk Management at U of I
Daily Activities of the Risk Management Department

- Claims Processing except Workers Compensation Claims (available online under Risk Management section)

- Review and administer all Waivers and Volunteer agreements this my be done online at www.uidaho.edu/risk

- Administer all Certificates of Insurance and Agreements from 3rd Parties and Vendors

- Review all agreements and contracts for RM issues and Certificate requests

- Consult any and all Departments with RM and Insurance questions or needs regarding their operations or special events on or off campus

- Encourage “Shared Responsibility” with all Stakeholders
Our Mission and Vision

Risk Management's mission is to support a safe and welcoming environment for University staff, faculty, students, visitors and partners by promoting enterprise risk management.

Our vision is to develop and maintain an enterprise-wide system of risk management at the University of Idaho that maximizes opportunities and minimizes loss. Enterprise risk management would analyze opportunities and risks from people, assets, fiscal and strategic operations, and apply appropriate risk management strategies, compliance and monitoring in a cycle of continuous improvement.
Claims

Risk Management

Submit a Claim

There are several types of claims that Risk Management needs to be notified of in a timely manner.

Accident Claims - An accident report needs to be completed for all accidents. The report form designates where to send the report form.

Incident Notification - At the bottom of the form, an incident report specifies who to contact.

Property Claims - Must be reported immediately to risk management if over $2,000 and within 90 days if under $2,000.

Vehicle Claims - A Vehicle Accident Report Form should be carried in all university owned vehicle and in all vehicles rented on behalf of the University of Idaho. The Vehicle Accident Report Form is part of the Vehicle Accident Claims Kit. A Vehicle Accident Claims Kit can be requested by emailing risk@uidaho.edu.
## About Your Risk Staff

<table>
<thead>
<tr>
<th>Risk Manager</th>
<th>Risk and Real Estate Specialist</th>
<th>Administrative Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keith A. Goodenough</td>
<td>Carry Salonen</td>
<td>Glenda Bull</td>
</tr>
<tr>
<td>885-6177</td>
<td>885-1177</td>
<td>885-7177</td>
</tr>
<tr>
<td><a href="mailto:kgoodenough@uidaho.edu">kgoodenough@uidaho.edu</a></td>
<td><a href="mailto:csalonen@uidaho.edu">csalonen@uidaho.edu</a></td>
<td><a href="mailto:glenda@uidaho.edu">glenda@uidaho.edu</a></td>
</tr>
<tr>
<td>Contracts for Indemnity and</td>
<td>Unit Training – Risk Assessment, Risk Control,</td>
<td>Claims – Auto, Inland Marine, Property, and</td>
</tr>
<tr>
<td>Insurance, development of</td>
<td>Insurance, and Claims</td>
<td>Camp</td>
</tr>
<tr>
<td>Insurance Programs,</td>
<td></td>
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<td>Products or Policies</td>
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<td>Risk Management Planning</td>
<td>Claims – Torts, Major Property, and Bodily Injury</td>
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</tr>
<tr>
<td>Loss Management</td>
<td>Waivers of Liability</td>
<td>Driver’s Records</td>
</tr>
</tbody>
</table>

Administration Bld., Adm. 209

www.uidaho.edu/risk  risk@uidaho.edu  (208) 885-7177
The Ombuds Office 2011-2012 Annual Report

UNIVERSITY OF IDAHO

July 1, 2011 – June 30, 2012

PREPARED BY
R. ELLEN SCHREIBER, M.ED.
OMBUDS

September 27, 2012
The Ombuds Office 2011-2012 Annual Report

UNIVERSITY OF IDAHO

History of the University of Idaho Ombuds Office

This annual report marks two decades of the Ombuds Office at the University of Idaho. The first University of Idaho ombudsman office was created in 1992 by President Elizabeth Zinser. Under the title of Office of Faculty Ombudsman, the office was originally staffed by a half time faculty member whose sole charge was to serve the faculty. Two years later in 1994, in response to a growing need for staff ombudsman services, Carol Hahn was appointed “interim staff ombudsman” and served for one year. The following year, the faculty ombudsman’s services were formally expanded to include staff. As the case load increased, President Robert Hoover approved the addition of a half-time, non-faculty assistant ombudsman, and Roxanne “Ellen” Schreiber was appointed to the position in 1998.

The University of Idaho Ombudsman Office and the role of the ombudsman continued to evolve over the next decade. In 2000, to more accurately reflect the role and responsibilities of the position, the original title of “assistant” ombudsman was changed to “associate.” This title was further modified in 2009, once again to more accurately reflect the role and responsibilities of the position, when the designation of “associate” was eliminated from the job title. In 2005, in keeping with a growing national trend to emphasize the gender neutrality of the office and ombuds position, the Faculty Senate adopted to change the office name and position titles to Ombuds Office and ombuds. In spring 2009, and consistent with most university ombuds offices across the nation, the Ombuds Office expanded its services to include both undergraduate and graduate students. In January 2010, upon the retirement of then co-Ombuds James Fazio, Ombuds R. Ellen Schreiber was assigned to the Ombuds Office on a full time basis, thus becoming the university’s first full time ombuds.

University of Idaho Ombuds 1992-present:

- David J. Walker, Dept. of Agricultural Economics/Rural Sociology, 1992-1999
- Thomas V. Trotter, Dept. of Counseling and School Psychology, Special Education, and Educational Leadership, 1999-2003
- Charles Morrison, Counseling and Testing Center, 2003-2005
- Roxanne “Ellen” Schreiber, 1998-present

Mission, Purpose and Function

The University of Idaho Ombuds Office mission is to support a positive and productive working, learning and living environment for faculty, staff and students by promoting mutual respect, ensuring fairness and resolving problems that emerge within the university. The primary purpose of the Ombuds Office is to resolve issues or conflicts informally and at the lowest possible level. The office also serves as an agent of positive change by helping to prevent problems by identifying and surfacing issues of concern, and by providing timely feedback.
The Ombuds Office mission and purpose are accomplished by the following:

- listening to concerns
- analyzing problems and exploring options
- providing information about policies and services
- facilitating dialogue between individuals and groups
- mediating disputes
- applying conflict resolution and conciliation methods
- coordinating with other offices on campus
- providing training in human relations, communication and conflict resolution
- noting trends and impacts
- recommending changes in policy and/or work procedures

In fulfilling its purpose, the Ombuds Office adheres to the following Standards of Practice and the Code of Ethics established by the International Ombudsman Association:

**Independence.** To ensure objectivity, the office operates independent of all university entities and reports to the highest possible level of the organization.

**Confidentiality.** All contacts, conversations and information exchanged with the ombuds remain confidential and are not disclosed without the consent of the parties involved and the ombuds. Limits to confidentiality exist when disclosure is necessary to protect someone from harm and when otherwise required by law.

**Neutrality.** An ombuds does not take sides nor represent nor advocate on behalf of any party or the university. Rather, it is the role of the ombuds to consider the facts, rights, interests, and safety of all parties involved in a search for a fair resolution to a problem. An ombuds advocates only for fairness and justice.

**Informality.** Consultations are conducted “off the record” and do not constitute notice to the university in any way. No personal information is retained or used for subsequent formal proceedings. An ombuds will not serve as a witness nor offer testimony in any formal proceeding unless required by law. Although the process is informal, individuals using the services of the Ombuds Office retain their rights to all formal procedures ordinarily available to them.

**Year in Review**

There were no significant changes in services, staffing or physical facilities during FY 2011-12. The adjacent, small ombuds office was cleared, cleaned and rearranged to provide an improved waiting area. This affords privacy for those waiting to speak with the ombuds and private consultation space for visitors during mediations or other multi-party interventions.

**Staffing.** The Ombuds Office is staffed by a full time professional ombuds. Services were available to all university employees and students during regular business hours throughout the week and during extended hours and weekends, whenever necessary to accommodate work shifts and schedules. Ombuds services were also available throughout the summer. Anna Thompson, assistant to the Faculty Secretary and to the Ombuds Office, provided administrative assistance.

**Case Load.** For the purpose of reporting, a ‘case’ is a new or recurrent issue that is brought to the ombuds’ attention by one or more individuals seeking assistance. It can also be an issue of which an ombuds becomes aware and takes self-directed action. Cases vary from a single informational visit to highly complex and involved interventions that require multiple parties and meetings, direct intervention and considerable time. The Ombuds Office addressed 209 cases in 2011-12. This represents an increase of 34
cases or approximately 19% compared to the previous year (Figure 1). The total number of cases reported in any year is a conservative figure. Numerous contacts occur informally and spontaneously throughout the natural course of business across the greater campus. While some of these encounters may result in case entries, many others are treated as part of the ombuds’ natural function.

Similar to previous years, the number of new cases by month showed modest fluctuations across most months of the year. Surprisingly, October had the highest number of new cases for the year with 24 cases and was a significant increase (85%) over the previous year’s 13 cases; however, no clear patterns emerged to account for the rise. The second highest month with 23 new cases occurred in March and coincides with the completion of the annual performance evaluation period, subsequent employment actions and the beginning of nonrenewal decisions and timelines. The start of the academic year proved to be another particularly challenging time with the number of new cases in August increasing approximately 57% over the previous year to 22 in 2011-12. Not surprisingly, the lowest numbers of new cases occurred in July with 11 new cases and September with 12 new cases. July is naturally a ‘quieter’ time for the university and a time when fewer faculty, staff and students are on campus, and September is when many programs and classes are settling in after the bustling startup period (Figure 2).
Nature of Visitors and Contacts. Once again, a slight majority of visitors to the Ombuds Office in 2011-12 were females (53%). This represents a slight decrease (3%) from the previous year and a normal fluctuation for the office. Consistent with most previous years, nearly three quarters of all visitors (71%) sought ombuds’ assistance on their own initiative rather than by referral. The seven percent increase in direct referrals is attributed to administrators, supervisors and advisors becoming increasingly familiar with the ombuds’ role and resource as a result of enhanced efforts throughout the year to heighten awareness and understanding of the Ombuds Office.

Table 1 shows that use of ombuds services across all employee categories continued to represent proportions similar to their distribution within the university and remained largely consistent with previous years’ fluctuations. The largest change was a 7% increase in percentage of total cases that were initiated by tenure-track faculty with 47 cases in 2011-12. There was also a 3% increase in percentage of total cases brought forward by undergraduate students over the previous year (13 cases in 2011-12). Once again, the student increase was anticipated due to enhanced outreach efforts to students and student service providers; and no trends or patterns, other than increasing awareness of the Ombuds Office, were associated within these fluctuations.

As mentioned earlier and common practice in academic settings, case affiliation is tied to the party initiating an individual case. The affiliation of each party within a case is not currently gathered or reported.

Table 1: UI Affiliation by Percentage of Cases

<table>
<thead>
<tr>
<th>Affiliation</th>
<th>2007-08</th>
<th>2008-09</th>
<th>2009-10</th>
<th>2010-11</th>
<th>2011-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classified Staff</td>
<td>42</td>
<td>40</td>
<td>35</td>
<td>37</td>
<td>34</td>
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<tr>
<td>Faculty (tenure track)</td>
<td>23</td>
<td>20</td>
<td>18</td>
<td>15</td>
<td>22</td>
</tr>
<tr>
<td>Faculty (non-tenure track)</td>
<td>-</td>
<td>-</td>
<td>3</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Administration</td>
<td>12</td>
<td>10</td>
<td>15</td>
<td>18</td>
<td>17</td>
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<tr>
<td>Exempt</td>
<td>16</td>
<td>18</td>
<td>9</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Graduate Assistants</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Grad Students</td>
<td>1</td>
<td>1</td>
<td>4</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Undergraduates</td>
<td>3</td>
<td>3</td>
<td>6</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Retiree</td>
<td>-</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>6</td>
<td>8</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Consistent with the previous year and in keeping with the experience of most ombuds’ offices, the majority of cases (69%) directly involved one individual; however, in most cases there was at least one other person of concern. This figure indicates that for these cases no other party was directly involved in addressing the problem. The remaining cases involved multiple parties directly involved with the problem; and among these, two-party cases continued to be most common (21%). The actual number of parties served, including single party and multi-party cases (where the parties were directly and/or substantially involved), increased from 294 in the previous year to 393 in 2011-12 (Table 2). The increase in total number of parties is, in part, the result of the overall increase in the number of cases as well as several cases involving significant work with entire units or numerous individuals within a unit. In these cases (i.e., a group of academic majors, academic departments or work units), unit-wide civility concerns, changes in leadership,
unit reorganization and persistent unit-wide tension were the focus of intervention. When counting parties to a case it is always challenging to track where separate cases begin or end from the presenting issues of the unit; however, the practice of the office has been to consider most subsequent individual contacts as follow up to the unit issue.

[The number of “parties” counted in unit-wide cases was determined by the degree to which the ombuds was involved with the parties and does not always reflect the actual number of persons within the unit.]

<table>
<thead>
<tr>
<th>Individuals Involved</th>
<th>No. of Cases</th>
<th>Total Parties</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>144</td>
<td>144</td>
</tr>
<tr>
<td>2</td>
<td>43</td>
<td>86</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
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<td>10</td>
<td>4</td>
<td>40</td>
</tr>
<tr>
<td>16</td>
<td>2</td>
<td>32</td>
</tr>
<tr>
<td>22</td>
<td>1</td>
<td>22</td>
</tr>
</tbody>
</table>

**Total Parties/Individuals** 393

Face-to-face consultation continues to be the most common format for delivering ombuds’ services, and it is encouraged whenever possible. Visitors regularly express appreciation for the opportunity to discuss concerns and explore options with another person in a confidential and helpful manner. The types of contact shifted only modestly over the previous year with seventy-seven percent of cases involving office or some form of face-to-face visits (including video calls). The use of video call consultation for non-Moscow-based parties is growing increasingly more familiar, more readily available and more reliable; and visitors continue to express appreciation and satisfaction for having this option available. In some instances where video conferencing was unavailable and limited travel funds or time constraints were a factor, telephone consultation was used. Telephone only contacts accounted for 21% of consultations. Email or other written modes of communication (letters, notes, etc.), although actively discouraged due to confidentiality concerns, once again accounted for 2% of contacts. Understandably, some use of email was logistically unavoidable.

Cases varied significantly in the amount of ombuds involvement needed; this involvement is reported as “contacts.” Twenty percent of cases involved only one visit or contact with no further ombuds/visitor/other direct involvement. The remaining cases involved multiple consultations or contacts, either with the visitor alone (the person bringing the case) and/or with others involved or with those who were a resource for addressing the concern (e.g., administrators, supervisors, General Counsel, Human Resources, Human Rights, Access and Inclusion, etc.). Contacts for 2011-12 totaled 769 for the year, and represent a decrease from the previous year’s 886 contacts. Differences in presenting issues and the amount of contacts needed account for normal year-to-year fluctuation. Table 3 shows the distribution of contacts per case.
### Table 3: Number of Contacts per Case

<table>
<thead>
<tr>
<th>No. of Ombuds Contacts</th>
<th>No. of Cases</th>
<th>Total No. Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>1</td>
<td>42</td>
<td>42</td>
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<tr>
<td>2</td>
<td>54</td>
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<td>18</td>
<td>1</td>
<td>18</td>
</tr>
<tr>
<td>23</td>
<td>1</td>
<td>23</td>
</tr>
<tr>
<td><strong>Total Contacts</strong></td>
<td></td>
<td><strong>769</strong></td>
</tr>
</tbody>
</table>

*An ombuds initiated case may or may not actively involve other individuals (e.g., bringing an observation to attention or reporting a concern); additionally, repeated efforts to follow-up on an inquiry without visitor follow through may result in a case with no contacts.

**Nature of Problems.** Recognizing that every organization will have concerns or problems that emerge within the normal process of conducting business, the University of Idaho provides multiple resources in addition to the Ombuds Office to help members of the community address their issues and problems constructively. However, it is the confidential, informal and impartial features of the Ombuds Office that most often prompt visitors to seek ombuds’ services, especially as an initial resource. While contact with the Ombuds Office is confidential, issues are tracked. The nature of problems presented to the Ombuds Office can inform the university of areas requiring attention. Given the overall increase in cases for the year, increases in problems that spread across the categories were not surprising and did not generally reflect a new pattern or trend. Figure 3 shows the distribution of problem categories received by the Ombuds Office in 2011-12. Each category is then discussed in detail.

![Figure 3: Problem type by year brought to the Ombuds Office](image-url)
Discrimination: There are no cases of discrimination brought directly to the Ombuds Office during the 2011-12 year. As in previous years, in several cases individuals who originally had discrimination concerns or complaints contacted the Ombuds Office after their issues were brought and/or assessed elsewhere and they were appropriately referred to the Ombuds Office for assistance with non-discrimination issues. Members of university community continue to be well-informed about the formal channels for addressing discrimination issues; however they are somewhat less clear about the limitations of those channels (at times applying the complaint of discrimination to a broader range of problems).

Harassment: Incidents of harassment perceived as due to age, disability, race/ethnicity/origin, religion and sex continue to be making their way to the appropriate formal office. However, whenever visitors do come to the ombuds office with these complaints, they are promptly referred to the appropriate formal office. During 2011-12 there were eight cases of perceived harassment. One case of perceived sexual harassment was brought directly to the ombuds and two cases of perceived religious harassment were received. There were no cases of harassment related to age, disability or race/ethnicity/origin.

There were five cases of general harassment or ‘bullying’ brought to the office. In these cases visitors came from across affiliation categories. In cases where the perception of ‘bullying’ was present, it was accompanied by very strong emotional intensity and often produced intractable conflicts. The presence of perceived bullying often led to a series of subsequent complaints—some of which became significant formal complaints.

Benefits: There were once again five cases attributed primarily to issues of benefits during the year. Three cases related to family and medical leave issues and two cases involving sick and annual leave were the only two areas that were sources of problems in this category.

Advancement: There was a notable increase in problems related to advancement over the previous year, increasing from six cases in 2010-11 to 11 cases in 2011-12. Salary and promotion and tenure/non-reappointment issues were the exclusive issues that arose during the year. Although the total numbers increased, no patterns or trends emerged from these cases.

Employment: Employment is the largest problem category with 25 “specifiers” or specific areas of concern; and as such, it continues to be the largest category of problems brought to the Ombuds Office. There were 57 cases that fell into this category, which is a slight increase of two cases over the previous year. Once again, given the overall increase in cases for the year, an increase in this category is not surprising. Of the specifiers, evaluations were again the most frequent source of conflict with 14 cases. This number remains stable. It suggests, and not surprisingly, that the evaluation process continues to be an area of recurring tension. The number of cases in each specifier or subcategory is shown in Table 4 along with the change from last year.
Table 4: Breakdown of 57 Cases in ‘Employment’ Category

<table>
<thead>
<tr>
<th>Change from last year</th>
<th>Cases</th>
<th>Change from last year</th>
<th>Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluations</td>
<td>14</td>
<td>Accommodations for Disability</td>
<td>0</td>
</tr>
<tr>
<td>Management</td>
<td>4</td>
<td>Assistantship Appointment</td>
<td>0</td>
</tr>
<tr>
<td>Job Description</td>
<td>6</td>
<td>Demotion</td>
<td>0</td>
</tr>
<tr>
<td>Reassignment</td>
<td>1</td>
<td>Hiring Interview</td>
<td>1</td>
</tr>
<tr>
<td>Probation (performance)</td>
<td>3</td>
<td>Marital Issues</td>
<td>1</td>
</tr>
<tr>
<td>Working Conditions</td>
<td>2</td>
<td>Office Space/Conditions</td>
<td>0</td>
</tr>
<tr>
<td>Workload</td>
<td>5</td>
<td>Program Termination</td>
<td>0</td>
</tr>
<tr>
<td>Flex time/Location</td>
<td>0</td>
<td>Scheduling</td>
<td>1</td>
</tr>
<tr>
<td>Resignation</td>
<td>2</td>
<td>Teaching Load/Course Assign.</td>
<td>2</td>
</tr>
<tr>
<td>Salary Agreement</td>
<td>2</td>
<td>Termination – Layoff</td>
<td>0</td>
</tr>
<tr>
<td>Hiring Process</td>
<td>4</td>
<td>Termination – Performance</td>
<td>0</td>
</tr>
<tr>
<td>Reclassification</td>
<td>0</td>
<td>Termination – Cause</td>
<td>6</td>
</tr>
<tr>
<td>Reorganization</td>
<td>3</td>
<td>-1</td>
<td></td>
</tr>
</tbody>
</table>

Interpersonal: Interpersonal conflicts are predictable within any organization, and in 2011-12 they were once again the third highest category of cases received by the office with 40 cases arising—the same number as those recorded in the previous year. Interpersonal disputes between supervisors and supervisees both increased by two cases. Tensions and disputes between individuals in the workplace and in the learning environment ranged from persistent annoyances between individuals to intensely disruptive, distracting and distressful impacts on multiple parties and non-parties (co-workers, supervisors, etc.). Similar to the previous year, many cases involved perceptions of incivility, disrespectful behavior and/or unfair treatment. Interpersonal disputes frequently overlapped with other categories, especially those of harassment (general bullying/harassment), ethical concerns (safety, fairness, etc.) and the ‘Other’ category (department head, department/unit function). Since cases can only be counted in one category, they are counted as interpersonal when it is the primary focus of the visitor’s attention and the ombuds’ resolution efforts. Interpersonal conflict cases initiated by faculty (in their faculty role) decreased by one case to 11 cases this year after a significant increase from the previous year. While these numbers are small overall, many of these disputes were intense, highly disruptive and persistent; and they often grew to involve or impact multiple parties. Of the 40 interpersonal dispute cases presented, the visitor’s dispute involved one or more of the following:

- Administrator: 2 cases
- Advisor: 1
- Co-worker: 4
- Supervisor: 10
- Supervisee: 8
- Faculty: 11
- Peers (student): 4
- Others: 0
Ethical Concerns: There were 23 cases involving ethical concerns during the reporting year. This is an increase of 7 cases over last year’s significant increase. While there are eight specifiers in the ethical concerns category, actual cases were distributed only in the following areas:

- Intellectual property: 1 case
- Health/safety: 10 cases
- Records management: 1 case
- Others: 11 cases

Visits to the Ombuds Office frequently involve multiple issues. Although some of the categories listed above show zero, it does not mean that the topic was not part of any visitor’s reason for using the Ombuds Office. For data management purposes, only the predominant or precipitating reason for contact is used. On the other hand, some cases defy placement in any of the established categories. These are listed as “Other” and are shown below.

Other: Sixty-five cases did not fit into the defined major categories and was an increase of 15 cases from the previous year. Nineteen of these cases involved department or campus unit function. These cases were most often brought to the Ombuds Office by a unit administrator and often involved multiple responses or interventions, on fewer occasions they were brought by one or more members of a department or unit. Unit-wide cases are often complex and involve many different issues, involve multiple parties, require considerable time, and have a significant impact on the individuals or groups involved. While it was not possible to remedy all issues within these groups, most efforts resulted in substantial functional improvement and prevented further deterioration. General descriptions within the ‘other’ category, including requests for meeting or unit facilitation and training, along with the number of cases, are shown below.

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of Cases</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department/unit function</td>
<td>19</td>
<td>+1</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>13</td>
<td>-2</td>
</tr>
<tr>
<td>Committee function</td>
<td>1</td>
<td>-2</td>
</tr>
<tr>
<td>Academic issues</td>
<td>14</td>
<td>+3</td>
</tr>
<tr>
<td>Department head (misc. problems)</td>
<td>6</td>
<td>+3</td>
</tr>
<tr>
<td>Disciplinary action</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Financial aid</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Facilitation</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

Resolution of Problems. Ombuds use a variety of processes to assist visitors with addressing concerns and resolving problems. Most cases involve multiple actions, so categories are not mutually exclusive. The types of ombuds’ actions taken once again remained fairly consistent with previous years, with the exception of information (providing information on policy, university resources, procedures, etc.), which decreased from the previous year. Four basic categories of ombuds’ actions are summarized in Table 5.
### Table 5: Actions Used by Ombuds

<table>
<thead>
<tr>
<th>Action</th>
<th>Cases</th>
<th>Percentage of Cases*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem exploration</td>
<td>182</td>
<td>87</td>
</tr>
<tr>
<td>Information</td>
<td>51</td>
<td>24</td>
</tr>
<tr>
<td>Intercession</td>
<td>67</td>
<td>32</td>
</tr>
<tr>
<td>(e.g., mediation, shuttle diplomacy, facilitation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referrals</td>
<td>70</td>
<td>33</td>
</tr>
<tr>
<td>(e.g., EAP, HR, Human Rights, Access and Inclusion, deans, supervisors, advisors)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Most cases involve multiple actions, so categories are not mutually exclusive and therefore exceed 100%.

**Outreach and Other Services.** The Ombuds Office contributes to the university’s Strategic Plan 2011-2015 by contributing most directly to the objectives of Goal Four: Community and Culture. At monthly New Employee Orientation, all new employees were introduced to the Ombuds Office role and resources. In response, some new employees sought out the office to let the ombuds know that their transition into the university was going well. The ombuds was frequently called upon to provide employee in-service trainings, presentations to academic classes and student organizations, on a variety of human relations topics and skills including campus civility, conflict management, communication and other topics within the ombuds’ expertise. Examples include: Building and Sustaining a Positive Workplace, Creating Campus Culture: Making the Positive Choice, Moving Forward: Appreciation & Change, Working Together in Teams, Managing Difficult Conversations, Managing Change in the Workplace, Building a Community of Professionals and Managing Differences and Conflict. Throughout the year, the ombuds provided 16 training sessions and participated in two supervisor retreat panels, four student sessions or class lectures and facilitated three department retreats. The ombuds was also regularly called upon to serve as a designated neutral and process monitor at official meetings to support respectful and constructive dialogue.

The Ombuds Office provided additional service to the broader university through continuing participation on the Benefits Advisory Group, Campus Emergency Preparedness and Response Team, Threat Assessment Team, Professional Development Coordinating Committee (core competence and conflict management planning groups), and a new LEAN/Continuous Improvement Advisory Board. Additionally, the ombuds contributed at the national and international level to the continuous development of the organizational ombudsman profession by serving as chair of the International Ombudsman Association (IOA) Membership Committee, a member of the Professional Development Committee and as a presenter and facilitator at the IOA annual conference.

**Professional Development.** To stay abreast of relevant professional issues, the ombuds attended the International Ombudsman Association Annual Conference, participated actively through the ombudsman association list serve, and consulted with (and provided consultation to other) organizational and academic ombuds. Since the ombuds holds licensure and national certification as a professional counselor, she also engaged in continuing professional education that, although crosses professional disciplines, contributes to increasing skills and effectiveness as an ombuds.

**Effectiveness of the Ombuds Office.** Being heard and understood is a powerful intervention. Visitors to the Ombuds Office frequently report how important it is to them—even when no resolution options or remedies are available—to have a ‘safe’ place and an impartial person in which to share their concerns. Being able to ‘do their thinking out loud’ without judgment or fear and being assisted with sorting out issues and response options is the most common and highly appreciated benefit reported directly to the ombuds and in written feedback. When solutions or resolutions are available or achieved, many of those...
directly and indirectly involved report that they are better able to resume their focus on work or studies and are relieved to experience improvements in their workplace and learning environments and repaired relationships. It continues to be generally much easier and more satisfying for all parties to resolve issues informally before issues escalate, whenever possible.

Visitor feedback form comments...

- I’m glad that the program exists on campus and I think it is a great resource.
- Great chance to improve a potentially volatile situation.
- This office really helps our institution maintain high standards of respect and fairness.
- Was very helpful in helping me as well as others in future, resolve an ambiguous policy issue.
- Gave me great insights and helped me formulate an excellent resolution to my issue.
- It was refreshing to have a truly unbiased opinion.
- Has been a great help before and thus returned for a new issue.
- An excellent and essential service of the university.

Assessing benefits and overall effectiveness, impacts and outcomes of ombuds services poses a challenge for ombuds offices. Results are difficult to measure or report since confidentiality precludes the use of many of the usual forms of evaluation, and visitor perceptions of outcomes are often tied to factors outside of an ombuds role (an ombuds cannot reverse decisions, change a grade, or adjudicate complaints, etc.). Helping visitors and all parties to be effective, constructive, fair and respectful in seeking solutions to their concerns, reducing harmful tensions or hostility, and thereby contributing to the overall well-being of the university community, is considered a successful outcome in the perspective of the Ombuds Office.

The Ombuds Office currently uses two evaluation methods to assess the outcomes and impacts of services. The first is based on the ombuds’ self-analysis of completed cases using a scale ranging between ‘satisfactory’ and ‘unsatisfactory’ resolution of cases; it is not a measure of visitor satisfaction. The scale attempts to evaluate the outcome and impact of each case as objectively as possible. Table 6 describes the outcome identifiers that fall within each range and that are used to guide the ombuds’ appraisal.

For 2011-12, the ombuds self-appraisal of case outcomes placed 85% of case outcomes within a range considered ‘resolved satisfactorily.’ Twelve per cent fell within the ‘neutral’ outcome range, and approximately three per cent were considered ‘unsatisfactory’ outcomes. Thinking through an issue or problem with an impartial skilled listener generally contributes to more positive and less destructive outcomes in most issues, even when a visitor or the university’s actions have already occurred or been decided. This may account for the sizeable number of cases gauged by the ombuds to be positive outcomes. The ombuds self-appraisal of cases for 2011-12 is summarized (using rounded numbers, totals will not equal 100%) in Table 6.
Table 6: Self-Appraisal of Outcomes/Impacts Ombuds Cases, 2011-12

<table>
<thead>
<tr>
<th>Outcome Category</th>
<th>Percentage of Cases (N=209)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resolved satisfactorily with Ombuds Office assistance</strong></td>
<td>85%</td>
</tr>
<tr>
<td>• Agreement/compromise reached through mediation; formal action avoided; visitor</td>
<td>8%</td>
</tr>
<tr>
<td>given another chance or situation otherwise satisfactorily resolved.</td>
<td></td>
</tr>
<tr>
<td>• Conflict resolved short of mediation; may involve ‘shuttle diplomacy’ or similar</td>
<td>11%</td>
</tr>
<tr>
<td>intervention, workshops with entire unit, or other techniques; formal action not</td>
<td></td>
</tr>
<tr>
<td>taken.</td>
<td></td>
</tr>
<tr>
<td>• Ombuds served, by invitation or suggestion, as neutral observer; may involve</td>
<td>4%</td>
</tr>
<tr>
<td>role as moderator, but not mediator; party(ies) satisfied with outcome; formal</td>
<td></td>
</tr>
<tr>
<td>action not taken.</td>
<td></td>
</tr>
<tr>
<td>• Information only was provided by Ombuds; and/or helps party to self-advocate;</td>
<td>57%</td>
</tr>
<tr>
<td>visitor satisfied.</td>
<td></td>
</tr>
<tr>
<td>• Action resulted in policy or system modification/improvement</td>
<td>1%</td>
</tr>
<tr>
<td>• Other</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Neutral Outcome (Ombuds Office had no direct impact)</strong></td>
<td>12%</td>
</tr>
<tr>
<td>• Ombud’s role was primarily as a neutral listener; little or no ‘coaching’ or</td>
<td>11%</td>
</tr>
<tr>
<td>additional information was provided. Visitor already had or did not need</td>
<td></td>
</tr>
<tr>
<td>information, but needed ‘someone to listen;’ may have received confirmation of</td>
<td></td>
</tr>
<tr>
<td>ideas/plans, but nothing new added by Ombuds.</td>
<td></td>
</tr>
<tr>
<td>• Visitor initiated and then canceled or ‘vanished’ after setting appointment or</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>before follow-up action was completed.</td>
<td></td>
</tr>
<tr>
<td>• Situation ‘unrepairable’ upon arrival (e.g. temporary help, already terminated,</td>
<td>1%</td>
</tr>
<tr>
<td>tenure was denied for appropriate reason, or visitor resigned).</td>
<td></td>
</tr>
<tr>
<td>• Other</td>
<td>&lt;1%</td>
</tr>
<tr>
<td><strong>Results Unsatisfactory</strong></td>
<td>3%</td>
</tr>
<tr>
<td>• Visitor disgruntled with Ombuds efforts and discontinued visits or contacts.</td>
<td>0%</td>
</tr>
<tr>
<td>• Visitor disregarded advice/solution and suffered consequences.</td>
<td>2%</td>
</tr>
<tr>
<td>• Unfair practice or situation not resolved nor corrected due to lack of</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>cooperation.</td>
<td></td>
</tr>
<tr>
<td>• Other</td>
<td>&lt;1%</td>
</tr>
</tbody>
</table>

The Ombuds Office Visitor Feedback Form (Figure 4) provides an opportunity for visitors to provide anonymous feedback on services and outcomes. While the feedback form provides general information on the ombuds effectiveness and visitor satisfaction, the instrument was designed primarily to support the ombuds’ continuous improvement and is not intended as a formal statistical measure. Use of ombuds visitor satisfaction and outcome assessments is known to pose a number of challenges. Among the more common issues are how a party’s role in the case, as well as their desired or expected outcomes, influence perceptions of satisfaction and success and not uncommon, lower than desired evaluation return rates. Despite these and other potential limitations, such feedback is welcome and useful; especially when paired with the ombuds’ self-appraisal of outcomes and impacts, the information contributes to strengthening the delivery of services.

Every effort is made to ensure the anonymity of the responding party, and no identifying information is requested on the feedback form. Completed forms are sent by visitors directly to the Provost’s Office for processing by a staff member assigned to manage administrative evaluations. A feedback summary report
is reviewed with the ombuds as a part of the annual performance evaluation process. As such, feedback summaries (calendar years) are not synchronized with the periods covered by the annual report period (fiscal year).

**Figure 4: Ombuds Office Visitor Feedback Form**

Thank you for taking a moment to provide feedback on your visit to the Ombuds Office; your responses will help us improve services. Please rate your experience by marking the appropriate boxes below and mail the completed form to Campus Zip 3152.

**Please do not include any identifying information (name, position or concern).**

<table>
<thead>
<tr>
<th></th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>I was able to talk with an ombuds in a timely manner.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ombuds explained his/her role and the confidential, neutral, informal (“off the record”), and independent standards of the office.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ombuds explained the limitations of confidentiality.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ombuds functioned neutrally and did not take sides.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I was treated respectfully.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ombuds helped me to clarify my issue(s) and identify options.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ombuds provided helpful information (policies/procedures, communication/conflict resolution skills, and referral).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ombuds helped me to address or better manage my concern.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ombuds helped me resolve my concern or helped prevent it from deteriorating or escalating unnecessarily.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would use the Ombuds Office again, if needed.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments:**

Please mark (X) your university affiliation: Faculty, Staff, Administrator, Student, Other.
While the intent is to receive feedback from all initiating case visitors, it can be a challenge to identify when a particular case closes (as in the case of protracted conflicts, ongoing departmental tensions and multiple overlapping issues, etc.), when a new one with the same parties begins or when a conflict involves immediate absence/leave or separations from the university. Additionally, not all individuals choose to provide contact information or to participate in giving feedback. Despite some of these known challenges, for the period March 2011 thru February 2012, 57 forms were returned. Overall, the responses were strongly positive and consistent with the ombuds outcome self-appraisals and support the conclusion that ombuds’ services continue to be perceived as helpful to individuals who sought assistance.

Issues and Recommendations

In the spirit of continuous improvement and in accordance with the provisions of the Faculty-Staff Handbook FSH 3820 B-6 (FSH), the Ombuds Office identifies those issues that may warrant further attention and offers general recommendations, when appropriate.

The ombuds are encouraged to comment on policies, procedures and processes with an eye to positive future change. These observations should be shared with the administrators and bodies with jurisdiction over those policies, procedures, and processes. (FSH 3820 B-6)

As in previous years, most concerns or problems brought to the Ombuds Office in 2011-12 were situational, or specific to a set of circumstances or individuals, rather than emerging from systemic problems. Whenever issues were specific to a particular responsibility area, they were brought directly to the attention of the respective administrator and are not included below. As with all organizations, there are always some areas where additional attention may offer opportunities for improvement and some of these are highlighted below. Issues and recommendations that were addressed in the previous year that continue to pose significant and/or increasing concern are noted by asterisk (*).

*Supervisor effectiveness/workplace climate. Supervisor effectiveness in setting and maintaining a respectful workplace climate, and in particular, modeling and ensuring respectful interpersonal conduct, is an area that necessitates heightened attention and re-mention due to the continuing frequency of problems arising and their significant impact. Individual employee well-being and productivity, as well as the overall function of the workplace, are deeply affected. Multiple complaints of disrespectful communication were received. These included: supervisors and coworkers using raised voices and ‘yelling’ when addressing problems, the use of profanity and offensive personality or character references, and supervisors communicating performance concerns in the presence of others. Such behaviors are inconsistent with the university’s expressed values, have had the impact of intimidation, and set an improper standard for the workplace. Recommendation: Provide supervisors at all organizational levels with clear expectations regarding the quality of interpersonal communication and conduct, and incorporate civility and respectful workplace training within the new supervisor training series.

*Reorganization and change. As the university continues to refine its organizational structures and processes, units undergoing significant restructuring, changes in leadership and revised employee responsibilities have experienced heightened workplace stress and conflict. The time involved to process some reorganizations, and the duration of uncertainty and turmoil, have been particularly distressful. Recommendation: To the extent possible, be attentive to the length of time reorganization processes are taking and the impacts of protracted processes on employees. Once again, include employee support strategies as a part of the change management process, and provide resources for the natural and predictable period of adjustment.
Social media: There is considerable confusion and increasing conflict related to the use of online social media. Faculty and staff at all organizational levels and students independently and as groups, brought forward complaints regarding social posts. The use of social media to vent upset at the university, supervisors, supervisees and peers is an increasing source of rapidly escalating conflict. **Recommendation:** Provide education and clarification to all employees on the use, potential impacts and cautions when referencing the university workplace or learning environment in social media. Provide students with opportunities to become more informed on the use and cautions associated with social media.

Graduate course grade expectations: Many courses at the graduate level are, by nature, more loosely structured than typical undergraduate courses; and performance expectations are not always clearly defined or stipulated. This can and has led to intense misunderstandings and grading conflicts. **Recommendation:** Develop and consistently communicate written expectations and the grading bases/rubric for all credits offered (including pass/fail credits).

Exit interviews: Separating employees, especially those with serious concerns about their work experience, frequently request to see the established procedure for ensuring that feedback from exit interviews is routed to the appropriate level administrator. **Recommendation:** Ensure that a clear and consistent process for transmitting exit feedback is in place and available to exiting employees.

Safety and security information: There is increasing interest in and concern for personal safety and security among faculty and staff; and the faculty and staff have expressed concern about their level of preparedness. **Recommendation:** Continue to enhance current online communication with periodic direct departmental training.

The Year Ahead

Undergraduate and graduate students are making their way to the Ombuds Office with increasing numbers and outreach to students will be a continuing priority in the year ahead. The office will continue to reach out to student leadership, residence life staff, student groups and student services while also relying upon the faculty, student advisors and staff to help inform the student community about the availability of ombuds services. Facilitation and group process consultation also increased over the past year and will continue to be available on request. Partnering with Professional Development and Learning (PDL) and other offices on campus to provide conflict management and other related human relations training was well-received, and the Ombuds Office will continue to contribute employee development workshops through PDL as well as at the request of individual departments and groups.

Acknowledgements

As the Ombuds Office celebrates the conclusion of two decades of service to the university community, I want to extend my sincere appreciation to President M. Duane Nellis and to Provost and Executive Vice President Doug Baker for their continued commitment to supporting the independence, neutrality, informality and confidentiality of the ombuds process. Further, I want to acknowledge that the work of the Ombuds Office could not succeed without the continuing commitment and support of university administration at all levels and across all colleges and divisions. These fundamental commitments, together with the trust, cooperation and constructive efforts of the many the faculty, staff, students and administrators who were served through the office, led to the successful resolution of numerous issues throughout the year.
POLICY COVER SHEET
(See Faculty Staff Handbook 1460 for instructions at UI policy website: www.webs.uidaho.edu/uipolicy)

[3/09]

Faculty/Staff Handbook [FSH] □ Addition X Revision* □ Deletion* □ Emergency
Minor Amendment □

Chapter & Title: Chapter 3: 3820 Ombuds Office

Minor Amendment □

Chapter & Title: ________________________________

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)

Ellen Schreiber
Name Date
____________________________________________________________________

Telephone & Email: 208-885-7668 schreibr@uidaho.edu

Policy Sponsor: (If different than originator.)

Doug Baker July 17, 2012
Name Date
____________________________________________________________________

Telephone & Email: 208-885-7919 dougbaker@uidaho.edu

Reviewed by General Counsel _X_ Yes ___ No Name & Date: ___ C.H. Graham ____________________

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.

The Ombuds serve at the pleasure of the President and are evaluated and reviewed by the President; however, the delegation to the Provost was inserted into policy (2005) creating a double reporting line. In addition, changes have been introduced that are consistent with practice standards in the field.

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

None – clarification of reporting line only.

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

None

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.

If not a minor amendment forward to: __________________________________________

Track # _______________
Date Rec.: _____________
Posted: t-sheet _________ h/e _________
web _________
Register: ______________
(Office Use Only)

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

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

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

[Office Use Only]
PREAMBLE: This section describes the office and duties of the Ombuds Office. Under its original title, “Faculty Ombudsman,” it was added to the Handbook in July of 1992 and, as its title suggested, was restricted to faculty. In July 1999 the section was rewritten, and retitled, so as to include the entire university community. In July 2005 the section was revised to reflect national standards of practice and current terminology. In 2009 the section was again revised to include students. Unless otherwise noted, the text is as of July 1999. More information may be obtained from the Office of the Faculty Secretary (208-885-6151). [ed. 7-00, rev. 7-05, 1-09]

CONTENTS:
A. Introduction
B. Duties of the Ombuds Office
C. Qualification and Nature of the Appointment
D. Nomination and Selection Process
E. Evaluation and Renewal

A. INTRODUCTION.

A-1. The establishment of an ombuds office is predicated on the following premises: (1) disagreements are inevitable in human organizations; (2) unresolved conflict inhibits productive enterprise and disrupts interpersonal relationships; and (3) an impartial third party may afford insights and informal processes for conflict resolution. [rev. and ren. 7-99, rev. 7-05]

A-2. The office is staffed by two ombuds, one ombuds that is an exempt position, and may also include one part-time position appointed from the tenured faculty ranks, and one part-time exempt position. Both ombuds report to the provost/president. [add. 7-99, rev. 7-05, 1-09]

A-3. The office provides a voluntary, informal mechanism to facilitate communications between individuals in dispute, to help clarify issues involved, and to suggest avenues for dispute resolution. Alternative avenues for resolving conflicts are available through other university offices and resources (e.g., Human Resources, Office of the Dean of Students, University Residences, Counseling and Testing Center and the Employee Assistance Program). The office’s role complements existing formal procedures. The processes initiated by the office do not substitute for or become part of other institutional processes. Individuals retain their right to use any formal procedures ordinarily available to them [see FSH section 3.8]. Ombuds are not authorized to accept notice on behalf of the university, and contact with the office does not constitute nor is it regarded as notice to the university. [rev. and ren. 7-99, rev. 7-05]

A-4. The ultimate success of the office is highly dependent on the assurance of impartiality, independence, informal processes and procedures, confidentiality, accessibility, expertise in mediation, and integrity. The environment in which an ombuds can be effective is one where administrators, faculty, staff and students recognize and respect the appropriateness and usefulness of the ombuds’ role in enhancing the goals of the individual members of the university community. [rev. 7-05, 1-09]

A-5. The university prohibits any employee from discouraging or limiting another employee or student from accessing the office, or intimidating, threatening, coercing, retaliating, or discriminating against any individual because that individual raised an issue or participated in dispute resolution through the office. [see 3810]. Employees will be allowed reasonable time away from work to access the office. The university also prohibits any employee or student from intimidating, threatening, coercing, retaliating, or discriminating against the ombuds, or their staff for performing the duties of the office. [rev. and ren. 7-99, rev. 7-05, 1-09]
B. DUTIES OF THE OMBUDS OFFICE.

B-1. The ombuds listens to concerns of any employee or student at the UI and use informal means to facilitate resolution of disputes. The ombuds do not act as advocates for a single party. Rather, they seek to find a reasonable and equitable solution for all parties to a problem or conflict situation in pre-mediation. Any employee or student in the UI community can bring a concern to the office, so long as it relates to the role and experiences of the workplace or university life. [rev. 7-99, 7-05, 1-09, ed. 7-01]

B-2. The office conducts discussions, makes inquiries and keeps confidential information about caseloads in a confidential manner, and is discreet in dealing with comments or inquiries from those not involved in the dispute or its resolution. With respect to confidentiality, all contacts, conversations, and information exchanged with the office are confidential to the fullest extent allowed by law, unless release is authorized by all parties involved as well as the involved ombuds person. There are limits to confidentiality, such as when necessary to protect someone from harm, or as otherwise required by law. No case records, documents, or copies of documents are kept, unless doing so is legally mandated. Working notes, which are regarded as confidential and ephemeral, are shredded along with documents at approximately two week intervals or at the conclusion of a case, whichever comes first, unless retaining these documents is legally mandated. In order to preserve the confidentiality and impartiality so essential to the successful conduct of the ombuds function, the standards and practices of the profession preclude participation by ombuds staff as witnesses in formal proceedings on or off campus, unless subject to a subpoena or other order from a court of competent jurisdiction. [rev. 7-99, 7-05, 1-09]

B-3. The office is impartial and its primary purpose is to help employees and students find resolutions to problems affecting or involving them. The office is well versed in the policies, procedures, and processes that exist at the university for handling complaints or concerns. The office will listen to the concern, make appropriate inquiries, involve appropriate other parties, make suggestions to the employee(s), student(s) and other parties involved (including but not limited to formal and informal procedures that could be used), and conduct mediation as needed. The office has the authority to make reasonable arrangements for meetings of appropriate people involved in a dispute to try to achieve a resolution. Ombuds may attend these informal meetings to help facilitate communication among the parties through mediation. Ombuds may serve as designated neutral observers at formal meetings and may provide recommendations regarding processes and procedures. [rev. 7-99, 7-05, 1-09]

B-4. The role of the office is not to make judgments on the merits of a particular situation or complaint, but rather to create an environment in which the individual concerned and the others directly involved come to a clearer understanding of the situation and reach reasonable and mutually satisfying agreements. The office is neither an advocate for any party nor a final judge of a situation, rather it facilitates a resolution determined by the parties. In specific instances, the ombuds may offer opinions and recommendations and may comment on a process or procedure when they believe it is not functioning well. [rev. 7-99, 7-05, 1-09]

B-5. The ombuds staff will have access to the Office of General Counsel for legal counsel and representation. Upon request by the ombuds staff to the Office of General Counsel, the university may provide access to independent counsel for their consultation and representation. [add. 7-05, ed. 1-09]

B-6. The ombuds are encouraged to comment on policies, procedures, and processes with an eye to positive future change. These observations should be shared with the administrators and bodies with jurisdiction over those policies, procedures, and processes. The ombuds author an annual report including aggregate data on the types of matters handled and narrative reflecting the character of the year’s activities. The report is submitted to the president, provost, faculty senate, and staff affairs committee on or before September 30 of each year. The annual report and other educational programs are means for proffering advice and comment on policies and procedures. [rev. 7-99, 7-10, rev. and ren. 7-05]

C. QUALIFICATIONS AND NATURE OF THE APPOINTMENT.

C-1. The ombuds will be an exempt position appointed by the president. A second ombuds may be selected
from among the tenured faculty at the UI (a faculty member in a non-tenure track position, or who has not achieved tenure, may be considered for the position under exceptional circumstances). Another ombuds will be an exempt staff position. Both serve at the pleasure of the president, but considerable independence and autonomy, confidentiality, impartiality, and informality are afforded to ensure the ombuds’ effectiveness in keeping with national standards for the office. The ombuds positions are part time. The term of service is for 2 years and is renewable upon evaluation and review by the president. The terms of the ombuds will be staggered so as to ensure there is always an experienced incumbent in the office. [rev. 7-99, 7-05, 1-09]

C-2. The qualifications of the successful candidate for ombuds should include:

a. excellent communication and interpersonal skills,

b. characteristics which lend themselves to facilitating problem solving,

c. demonstrated ability to handle confidential information and use discretion in sensitive matters,

d. demonstrated experience in mediation and conflict resolution processes,

e. respect of his or her colleagues for professionalism and integrity,

f. familiarity with university policies and procedures, especially those pertaining to grievances and records. [rev. 7-99, 1-09, ed. 7-05]

D. NOMINATION AND SELECTION PROCESS.

D-1. Ombuds selection.

a. The chair and vice chair of the Faculty Senate propose to the council for appointment two Faculty Senate members to serve on a nine-member ombuds committee. The chair and vice chair of the Staff Affairs Committee (Staff Affairs) propose two Staff Affairs members to the Staff Affairs for appointment. The president and vice president of ASUI select two students, one graduate and one undergraduate. The committee is composed of the provost, the director of Human Resources, the six aforementioned members and the outgoing ombuds (without vote), and has the responsibility for nominating people for the ombuds position. [rev. and ren. 7-99, ed. 7-05, rev. 1-10]

b. The advertisement is drafted by the committee and reviewed and approved by the president. The committee advertises the position, accepts and solicits applications and nominations, and interviews candidates. The committee functions in a confidential manner. [rev. and ren. 7-99]

c. The committee provides a list of at least two nominees to the Faculty Senate, Staff Affairs and ASUI, forwards the list to the president along with a portfolio and statement of rationale for each nominee. The president reviews the files and interviews the nominees. The president selects the ombuds from that list. [rev. and ren. 7-99, rev. 7-05, 1-10]

E. EVALUATION AND RENEWAL.

E-1. Ombuds review. The president conducts an annual review of the ombuds. During the latter half of the second year of each two-year term, an in-depth evaluation is conducted by the president. Included in the evaluations are assessments by the provost, the Faculty Senate, Staff Affairs, ASUI and a self-evaluation by the ombuds. These confidential evaluations are submitted to the president for review and discussion with the incumbent by February 15 in the second year of service. Renewal of the appointment of the exempt ombuds and renewal of the ombuds will be based on these evaluations and requires mutual consent of the Faculty Senate, Staff Affairs and the president. [rev. and ren. 7-99, ed. 7-06, rev. 7-05, 1-10]
1. 2012 Teaching and Advising Excellence Awards Update (A-6 above)
   a. Changing to an on-line process for greater consistency across university-level awards processes. Additional information on this process will be provided later this month.
   b. Please encourage your college/department colleagues to nominate excellent teachers and advisors (at all UI campuses) for these awards.

2. Development of teaching events targeted for 2012 (A-2 above)
   a. The spring 2012 inaugural season of the Teaching Excellence Brown Bag series (aka “TEBB Talks”) was deemed one successful method for promoting excellence in teaching on campus. The theme was “Action-Based Pedagogy” and guest speakers included 2011 Teaching Excellence Award winners Michael Kyte, John Lawrence and Wendy McClure.
   b. Events and dates associated with the 2nd Annual TEBB Talks will be announced later this semester. Events will be scheduled for spring 2013 on select Thursdays, from noon-1 PM.
   c. The TEAC is soliciting suggestions for additional event topics and format ideas. Feedback may be submitted to: mirandaa@uidaho.edu

3. Review of FSH 2700 Student Evaluation of Teaching (A-3 and A-4 above)
   a. Review and revisions to FSH 2700 were last approved on April 28, 2008. Item B-8 states that: “The Office of Academic Affairs, in conjunction with the Teaching and Advising Committee, will review the student evaluation of teaching forms and processes periodically, at least every five years.”
b. The Teaching and Advising Committee has identified this review as a primary agenda item for this AY. The Committee is currently discussing the process that it will undergo for this review. Following are some initial guiding principles that will provide a framework for this discussion/brainstorming session scheduled for the Nov. 1st committee meeting:

i. Context:
   • Changes since the 2008 review including the implementation of the 2011-2015 University of Idaho Strategic Plan and its Teaching and Learning Goals.
   • Current research/perspectives on approaches to, effectiveness of, and best practices for evaluations of teaching in higher education.
   • Other

ii. Purpose:
   • “To promote a faculty and administrative culture dedicated to the enhancement of teaching and advising.” (from TEAC Function A-1)
   • Reflection on the teaching and learning at the University of Idaho
   • Identify methods for defining and measuring success as well as opportunities for improvement/growth in teaching and learning
   • Other

iii. Perspectives:
   • Identify key groups and individuals for involvement in review process (including administrative, faculty, staff, and student perspectives)
   • Identify mechanism for gathering feedback from these various constituents
   • Other

iv. Issues/Opportunities:
   • Policy level review topics
   • Procedural review topics
   • Format and use of evaluation data (i.e. role of teaching in the promotion and tenure process)
   • Other

v. Timeline
   • Prioritization of review topics/focus areas
   • Target dates for completion of review topics/focus areas

c. The TEAC is soliciting suggestions for additional topics, perspectives and format ideas related to the review of FSH 2700. Feedback may be submitted to: mirandaa@uidaho.edu

Submitted by Miranda S. Anderson, Teaching and Advising Committee Chair
AGREEMENT

BETWEEN THE UNIVERSITY OF IDAHO COLLEGE OF LAW
AND
THE UNIVERSITY OF IDAHO PROFESSIONAL SCIENCE MASTERS GRADUATE PROGRAM

TO ESTABLISH A CONCURRENT JD/PSM DEGREE

Effective Spring 2013

Introduction:

With this agreement, the University of Idaho College of Law (henceforth the “College of Law”) and the University of Idaho Professional Science Masters Program within the University Wide Programs reporting structure (henceforth the “PSM Program”) form a concurrent degree agreement wherein students can be concurrently admitted to the College of Law and the PSM Program. Students concurrently enrolled may take courses in the College of Law and the PSM Program, enabling them to earn both the Juris Doctor (“J.D.”) and Professional Science Masters (“PSM”) degrees.

Except as otherwise provided in this agreement, each degree program continues to operate separately, maintaining its own academic standards. A student must satisfy the requirements of each college, as well as the requirements of the Concurrent J.D./PSM program as outlined in this agreement, to receive both degrees. Students are subject to all policies and procedures outlined in the College of Law’s Student Handbook, the College of Law Honor Code, the PSM Graduate Student Handbook, the University of Idaho Student Code of Conduct, and the University of Idaho’s Catalog, except as noted herein.

1. Administration:

The Associate Dean for Students and Administration (or designee) in the College of Law (the “Law Associate Dean”) and the PSM Program Director serve as “Program Advisors” and administer the concurrent program. The Program Advisors are responsible for overall coordination of the concurrent program and for providing advice and recommendations to the deans and faculty of both colleges and programs concerning curricular issues and operations. Each Program Advisor administers her/his respective separate degree requirements and serves as a liaison to her/his respective college or program for notices and updates to this agreement.
2. Admission:

A student must apply separately and be admitted to both the College of Law and the PSM Program in order to be eligible for this Concurrent Program. In addition, the student must be accepted by the College of Law and College of Graduate Studies for admission to the Concurrent Program. A student may apply for admission to the Concurrent Program at any time prior to receipt of either degree. However, we recommend students either (1) obtain admission to both the J.D. and the PSM Programs prior to beginning either program, or (2) apply to the PSM Program and the Concurrent Program during their first year of law school.

3. Tuition and Fee Policies:

Students pay normal tuition and fees to the University of Idaho.

During the first three years of study in the Concurrent Degree Program, students pay the additional law student professional fee but do not pay the PSM student professional fee.

During all subsequent years of study in the Concurrent Degree Program, students pay the additional PSM student professional fee, if any, but do not pay the law student professional fee.

The Law Associate Dean will coordinate with the Registrar to ensure that the law student professional fee is not assessed after the third year of the program.

4. Course of Study:

A student enrolled in the Concurrent Program may commence studies in either the College of Law or the PSM Program, but no credits earned in the PSM Program prior to the completion of the first year of study in the College of Law will apply towards the J.D. degree. This limitation is required by American Bar Association accreditation standards and cannot be waived.

Up to twelve (12) PSM graduate school credits are allowed towards the J.D. degree. To receive this credit, a student must receive a grade of B or higher in a course approved by the Law Associate Dean of Students or the College of Law faculty for law credit. For all such courses, a grade of P, rather than the actual grade, will appear on the student’s law school transcript. A student will be required to complete the Concurrent Program, as well as the requirements for receipt of both degrees, for the College of Law to count twelve credits towards satisfaction of the graduation requirements for the J.D. If a student fails to receive the PSM, a maximum of six semester credits earned in the PSM Program can count towards satisfaction of the graduation requirements for the J.D. with the approval of the Law Associate Dean. Upon approval by the Law Associate Dean or law faculty, the student must complete and submit a “Course Level Adjustment Form” indicating which non-law courses will be used toward the J.D. degree. This form should be submitted during the semester in which the course is taken.

Up to six (6) law school credits are allowed toward the PSM degree for all concurrent degree students (see paragraph 5 for the list of courses approved as part of this agreement).
It is recommended that students begin the Concurrent Program by first completing the first year of study at the College of Law. The first year of study at the College of Law must be taken as designed by the College of Law for all entering law students. Subsequent years of the Concurrent degree program can be designed by the individual student and the student’s faculty advisor, subject to any restrictions or required classes noted herein.

By the end of the first year in the program, students must complete a study plan with the advice and approval of both the PSM and Law faculty advisors.

5. Opportunity for Credit Toward the PSM Degree for Courses Taken in the J.D. Program:

As indicated in paragraph 4, up to six (6) law school credits are allowed toward the PSM degree for all concurrent degree students. JD/PSM students can use Law classes to satisfy any two of the subgroups as part of the Professional Skills Courses Requirement.

Law School courses approved for credit toward the PSM degree:

- Law 906 Natural Resources Law Seminar
- Law 907 Administrative Law
- Law 934 Land Use Law and Planning
- Law 939 Law and Science
- Law 937 Wildlife Law and Policy
- Law 938 International Environmental and Water Law
- Law 939 Natural Resource and Environmental Law and Science Seminar
- Law 942 Water Law I
- Law 946 Water and Energy Policy Seminar
- Law 947 Environmental Law
- Law 948 Introduction to Natural Resources Law
- Law 949 Native American Law
- Law 951 Environmental Policy
- Law 969 Water Law II
- Law 979 Native American Natural Resources Law

Additional courses in the law school may be used toward the PSM degree with the approval of the student’s PSM advisor and the PSM Program Director.
6. **Academic or Other Discipline; Termination of Concurrent Degree Enrollment:**

Students enrolled in the Concurrent Program will be subject to the UI College of Law Honor Code, the University of Idaho Student Code of Conduct, and all other applicable codes of conduct at the University of Idaho. Each College and Program agrees to notify the other if a student enrolled in the Concurrent Program is disciplined, suspended, expelled or put on probation for academic or other reasons. If a student is officially disciplined by either College or Program for any reason, the Program Advisors will review these actions and make a decision whether the student will be dropped from the Concurrent Program. Students enrolled in the Concurrent Program must agree to waive their right to confidentiality to the extent necessary to effectuate this provision.

7. **Effective Date**

This Agreement will be effective Spring 2013.

8. **Notices.**

   In the event either the UI College of Law or the PSM Program effects any change to its curriculum which affects the Concurrent Program, or in the event that any action by the University of Idaho affects any aspect of the Concurrent Program, notice of such event shall be given to the other party in writing by the following means:

   To the College of Law:

   By email to the email address of the Law Associate Dean, with a paper copy mailed by U.S. Post to:

   University of Idaho College of Law  
   875 Perimeter Drive MS 2321  
   Moscow, Idaho 83844-2321  
   Attention: Associate Dean for Administration and Students.

   To the PSM Program:

   By email to the email address of the PSM Program Director, with a paper copy mailed by U.S. Post to:

   University of Idaho  
   Professional Science Masters Program  
   875 Perimeter Drive MS 3006  
   Moscow, ID 83844-3006  
   Attention: Program Director
The University of Idaho College of Law, Professional Science Masters Program, and the College of Graduate Studies approve this Agreement to create a concurrent J.D./PSM degree in Law and Profession Science Masters.

For the University of Idaho, Office of the Provost

Douglas D. Baker    Date
Provost and Executive Vice President

For the University of Idaho, College of Graduate Studies

Jie Chen    Date
Dean, College of Graduate Studies

For the University of Idaho College of Law

Donald D. Burnett    Date
Dean, College of Law

For the University of Idaho Professional Science Masters Program

Jan Boll    Date
Program Director, Professional Science Masters