University of Idaho
2015-2016 FACULTY SENATE AGENDA

Meeting #13

3:30 p.m. - Tuesday, December 1, 2015
Brink Hall Faculty-Staff Lounge & Scopia

Order of Business

I. Call to Order.

II. Minutes.
   - Minutes of the 2015-16 Faculty Senate Meeting #12, November 17, 2015 (vote)

III. Chair’s Report.

IV. Provost’s Report.

V. Other Announcements and Communications.

VI. Committee Reports.
   
   Benefits Advisory Board (Hrdlicka)
   Classification Task Force (Foisy)
   Information Technology Committee - Scopia (Brown)
   University Budget & Finance Committee (Brandt)

VII. Special Orders.

VIII. Unfinished Business and General Orders.
   
   - FS-16-016 rev: FSH 3320 – Faculty Evaluation (Crowley)(vote)

IX. New Business.

X. Adjournment.

Professor Randall Teal, Chair 2015-2016, Faculty Senate

Attachments: Minutes of 2015-2016 FS Meeting #12
FS-16-016
Present: Anderson, Boschetti, Brandt, Brewick, Brown, Caplan, Couture (Boise), Crowley (w/o vote), Flores, Foster, Hiromoto (Idaho Falls), Hrdlicka, Jeffery, LaPrath, Mahoney, Nicotra, Royer, St. Claire, Stoll, Teal, Stevenson for Wiencek (w/o vote), Wolf. Absent: Adams, Barbour, Chung, Folwell, Godfrey (Coeur d’Alene), Latrell, Murphy, Perret, Wiencek (w/o vote). Guests: 7

Chair Teal called meeting #12 to order at 3:31. A motion (Brewick/Royer) to approve the minutes for the meeting on November 10, 2015 passed unanimously.

Chair’s Report: Chair Teal announced that the University Faculty Meeting scheduled for December 3, 2015 had been canceled. There were not many actionable items to vote on and several important items that will be coming to the Senate will not arrive in time for a December UFM. There is a possibility that a UFM will be scheduled in February. He also reminded Senators that the Provost Office must have the nominations for the University Promotions Committee right away. We are still waiting on nominations from several colleges.

Provost’s Report: Vice Provost Jeanne Stevenson emphasized that nominations for the University Promotion Committee need to be in right away. She also noted that the Strategic Planning Task Force was beginning its work. She encouraged people to go to the website to look at developments regarding the strategic plan. She also briefly discussed the use of Yellow Dig and Sli-Do which are technologies being used to enhance participation. She also noted that there will soon be an Alumni Survey going out to gather feedback on the strategic plan.

FS-16-014a (UCC-16-019): This proposal changes the name of a minor from Conservation Social Sciences Minor to Natural Resource Conservation Minor. This is being done to match the degree in Natural Resource Conservation. The proposal passed unanimously.

FS-16-014b (UCC-16-019): This proposal is to discontinue the Certificate in Fire, Ecology, and Management. Professor Alistair Smith was invited to speak to this proposal. The Department of Forest, Rangeland, and Fire Sciences voted to remove the undergraduate certificate because there was a minor in Fire Ecology and also a graduate certificate with the same name. This proposal passed unanimously.

FS-16-015 (UCC-16-018) Martin School Reorganization: Chair Teal invited Brian Ellison the Director of the Martin School to discuss the proposed reorganization of the Martin School. Professor Ellison discussed the current structure of the Martin School which includes Political Science, Philosophy and the International Studies program. The Dean of CLASS asked him to Chair a task force to consider reorganization. The resultant proposal would bring the International Studies program together with the department of Modern Languages and Culture into a newly titled Martin School of Global Studies. The other part of the reorganization would bring Political Science and Philosophy together into a new department of Politics and Philosophy. Professor Ellison noted that the faculty of these various departments and programs were fully in support of these changes. A Senator asked about whether there was a common space for these programs. Professor Ellison responded that the departments and programs were scattered around the 2nd and 3rd floors of the Administration Building. Another Senator wondered about economies of scale and whether there were costs to this reorganization. Professor Ellison mentioned that there would be some cost savings. Following a suggestion that there would be curriculum changes coming forward shortly, a Senator asked about the nature of those changes. Professor Ellison noted that coming curriculum changes were a response to assessment not really the proposed reorganization. Both Philosophy and Political Science would continue to offer separate majors and minors. Future curriculum changes would involve more cross-listing of courses between the two programs. The proposal to reorganize passed unanimously.
Contingent Faculty Task Force Report: Former Senator and current Dean of Engineering, Larry Stauffer, was invited to discuss developments on this task force. He noted that due to pending changes to the Fair Labor Standards Act it was thought best to separate the discussions of contingent faculty and contingent staff. Dean Stauffer stated that the task force will be hosting four open sessions in the next week to provide input into issues related to contingent faculty. He suggested that he had been surprised at how many differences existed on campus regarding the status and benefits of contingent faculty. Dean Stauffer suggested that we might distinguish between those who taught courses as part of a career ambition and those who taught courses more as a recreational hobby. Some Senators suggested that this distinction didn’t really capture what we should be concerned about. The resultant discussion focused on when a contingent faculty member might be eligible for benefits and when they might be expected to have rights to participate in the decisions of a unit. There were also several comments suggesting that the contributions of contingent faculty frequently went unrecognized. Acknowledging that providing benefits to contingent faculty can be costly, a Senator suggested that the new consolidated fringe pool discussed last week might help in this regard. As the conversation came to a close Dean Stauffer promised to return with some specific proposals at a later date.

Dean of Students Office: Chair Teal introduced the new Dean of Students Blaine Eckles. Dean Eckles provided an overview of the wide-ranging services and activities of the Dean of Students Office. He emphasized that their primary function was to be advocates for students. His office handles a variety of student activities including Greek life, crisis prevention, and student discipline. They seek to facilitate getting help for students and to help them navigate the university bureaucracy. When asked about trends across universities in this area, Dean Eckles noted that crisis intervention receives a lot more attention now than in the past. He also mentioned changes in what was required by Title IX and student disciplinary procedures. In response to another question Dean Eckles emphasized that his office would like to talk to any students who were struggling, or needed help in dealing with issues on campus. He encouraged anyone with questions to email askjoe@uidaho.edu.

Fall 2015 Graduates: A motion (Brewick/Foster) to approve the list passed unanimously. (Note: There was a question raised about a student on the list and whether he had met all the requirements. Several Senators agreed to look into the question.)

FS-16-016: FSH 3320—Faculty Evaluation: Chair Teal asked Don Crowley to explain the proposed edits to 3320. He explained that last year a Dean had suggested that the process required when a tenured faculty member received a “below expectations” evaluation wasn’t as clear as it could be. In response, the faculty secretary’s office was proposing a slight edit to 3320 section B and 3320 section C to clarify the process. The changes to C try to highlight that the same steps outlined in B apply to a tenured faculty member. The proposed changes in B-1 seeks to clarify the role of the unit administrator in suggesting sources of help for the faculty member. Several Senators raised questions as to whether the proposed changes to B-1 might still be problematic. The concern raised was that perhaps we were asking unit administrators to be overly speculative about the causes of the poor performance. The discussion that followed centered on how the section might be worded so that a unit administrator might provide the necessary resources and help without being too speculative about the causes of a problem. With the hour getting late it was suggested that we might try to reword this section and take it up at the next meeting. A motion (Stoll/Hrdlicka) to postpone the discussion until the next meeting passed with no objections and two abstentions.

Adjournment: A motion (Wolf/Mahoney) to adjourn passed unanimously at 5:03.

Don Crowley, Faculty Secretary and Secretary to the Faculty Senate
Information Technology Committee

Background: The U of I switched to the new videoconferencing system and disbanded central technical support and scheduling because of lack of funds to cover the old system that was overseen by IT. Individual units are now responsible for providing their own equipment and technical personnel, and there are several rooms on campus that have been updated with modern hardware. A committee evaluated vendors who could provide a less expensive solution for videoconferencing software and internet services, and chose Scopia because it seemed more reliable, easier to use and less expensive than other choices. Currently, IT is waiting for the administration and faculty to decide the academic needs (e.g., distance education) for which videoconferencing will be used, because these decisions will impact IT's proposed solutions.

1) what are the specific issues/problems with Scopia

We have changed this question to read, "what are the specific issues/problems with videoconferencing" because problems with Scopia are only one part of the whole. Videoconferencing depends upon having quality hardware that can pick up and deliver audio and video. It depends on an internet bridging service that can efficiently move audio and video between multiple locations; Scopia provides that bridging service. Videoconferencing also depends upon the knowledge of those who are setting up and using the equipment and software.

Although units in Boise and at other locations have newer video equipment, units with videoconferencing capabilities on the Moscow campus are largely working with older equipment. Properly engineered rooms have fewer problems with video and audio quality because they were designed with the correct equipment for the space. Mobile videoconferencing equipment has restricted capabilities, because they are designed for smaller spaces than those in which they are often used. Boise's newer video equipment is also becoming outdated. It might help if it were easier to schedule the rooms that are set up for videoconferencing, but scheduling is by unit.

There have been issues with getting Scopia to work properly. Scopia has been very responsive to fixing these issues, which often are caused by outdated video equipment. One important problem was with recordings that were often lost or terminated; Scopia believes that they have fixed the recording problems. Although the videoconferencing facilities in Boise have also had problems with recording sessions, they are not experiencing the other problems that Moscow is, probably due to their newer equipment.

The third part of the videoconferencing whole, is the technical expertise to run the video equipment. The units with videoconferencing equipment employ individuals with the expertise to run their equipment. IT no longer provides a central service supporting videoconferencing, although they will provide mobile services for a fee. Providing technical information on the IT website is difficult because equipment isn't standardized across units, and there are security concerns related to advertising specific details. However, it would help to have some type of easily accessible information about videoconferencing on the UI
website so that answers to questions about who to contact for assistance with scheduling or technical problems can be found quickly.

2) can Scopia solve the issues

As mentioned above, Scopia has been very responsive to fixing the issues that have arisen. Boise reports few problems once the system was setup.

3) are there other solutions

Several units (Engineering, Science, to name two) do not use Scopia for videoconferencing, relying upon other methods such as Skype, Google Hangouts, Zoom and Go-To-Meeting. These resources work well for collaboration, but do not work well for classroom or state-wide meetings. IT believes that other bridging services would have the same problems that Scopia is having, and therefore it is not worth changing vendors until U of I Moscow has a firm plan for distance education.
1) GIS/Scopia provides core functions previously provided by the U of I operated bridge

There are many U of I events every day that depend on the GIS/Scopia system.

   a) Bridging multiple sites

   Most videoconference units in the university are limited to a single connection. Many classes and events involve multiple sites.

   b) Avoiding firewall problems

   The bridge capability is often necessary when connecting to non-Ul sites because of firewall restrictions at many sites.

2) GIS/Scopia has provided some enhanced capability that we did not have with the old bridge system

There is a lot of functionality that we did not have before and users are starting to take advantage of them.

   a) High definition video

   The GIS/Scopia system runs at HD720 while the old system ran at SD480. This is a substantial improvement in video quality and lets us take better advantage of newer video equipment at many university locations.

   b) PC/Mac/mobile device support

   The GIS/Scopia system integrates videoconferencing on the high end systems in many university locations with a more distributed solution based on personal devices. This has already been used in ways that were not possible with the previous system. We have barely started to tap the potential here.

      (i) Connecting U of I classes or events to external locations that don't have VC capabilities (example Law classes connecting to external Law firms for guest speakers).

      (ii) Providing convenient access at home for students with special needs or who are ill or injured.

      (iii) Lower cost "VC lite" rooms that are much cheaper than conventional videoconference rooms

   c) Programmable connections

   The system can be programmed in advance to connect to sites at a designated time. This has been used in locations where there is not always a technician available to operate the video equipment.

   d) Easy recording of videoconferences

   This could be a very valuable new capability. To date, it has been problematic (but we did not have it at all with the old system).

3) There have been problems with some of the GIS/Scopia functions, and there are some improvements that we will need in the near future.

There have been some real problems with the system. Most of these are around capabilities that we didn't even have on the old system.

   a) Recordings

   There have been multiple problems with audio/video synchronization and with lost or aborted recordings. These are being worked on by GIS and Avaya but progress has been slow. For groups that have moved quickly to use these new capabilities, they are having serious problems. It might be best for us to take a more cautious approach to adopting new functionality.

   b) 1080HD

   We need to see further improvements in video quality to keep up with the newer hardware being installed at many university locations.
4) **Many of the problems users experience are not due to the GIS/Scopia system.**

When we switched to the new system, U of I also disbanded the central technical support and scheduling group. Much of the dissatisfaction from users comes not from technical problems with the GIS/Scopia system, but because of lack of U of I technical support or U of I business process problems.

   a) No central technical support

   All of the centers and several units have technical support for videoconferencing, but many units are not covered. This is especially a problem in Moscow. There are no good self-help facilities; and providing technical information on the IT website, for instance, is difficult because equipment isn't standardized across units.

   b) No central videoconference facilities/aging facilities

   There are no centralized videoconference facilities in Moscow. If units do not purchase and operate them, they do not have access to them other than on a "ask as a favor" basis from units that do own them. Several units (Engineering, Science, to name two) do not use Scopia for videoconferencing, relying upon other methods such as Skype, Google Hangouts, Zoom and Go-To-Meeting. Much of the hardware in use is outdated.

   c) No central scheduling support

   Again, all of the centers and the units with videoconference facilities have people who do scheduling for videoconferencing. If you are not in one of the centers or those units, it is very difficult to figure out how to arrange a videoconference.
MEMORANDUM

To: Provost Council, University of Idaho Community
From: University Budget & Finance Committee
Date: November 10, 2015
Re: Funding Requests

Under the guidance of President Staben’s directive to improve and incentivize our budget process, Provost Wiencek and Vice President for Finance Foisy have charged the University Budget and Finance Committee (UBFC) with soliciting and evaluating requests for both new continuing funding and for one-time funding exceeding $100,000 from all areas of the University of Idaho.

By way of background, each year the State Board of Education (SBOE) announces its budget priorities in April. The University then quickly evaluates its needs and shapes its state budget request to fit the SBOE’s announced priorities. The UI state budget request items are presented to the SBOE’s budget committee in May and the budget request is approved by the SBOE at the June meeting. Once UI requests become part of the budget request approved by the SBOE, the entire budget request moves forward through the state legislative process. Individual requests eventually may become part of budget proposals by both the Governor and the Joint Finance and Appropriations Committee in the next legislative session.

The goal of the University is to develop a transparent process by which all areas may make requests for both new continuing funding and for significant one-time or short-term strategic investments. The goal is to evaluate and prioritize budget requests prior to the announcement of SBOE budget priorities in April. This process will create a pool of requests to inform not only the state budget request process but also to identify internal investment opportunities. The process will allow diverse proposals to percolate through the UI. It also will position the UI to make a more strategic and robust set of requests to the SBOE in the annual UI budget request to the SBOE.

In order to move forward expeditiously, the UBFC has developed the attached Funding Request form and optional Budget Detail form. Any area desiring new continuing funding for fiscal year 2018, or desiring one-time/short-term funding in excess of $250,000 for fiscal year 2017 should complete this form according to the guidelines below.

Guidelines

1. Funding Requests from academic units must be submitted to the Dean of the College. Other areas of the UI should submit Funding Requests to the Vice President in charge of the area. Funding Requests for those areas reporting directly to the President should be submitted to Brenda Helbling. Deadlines for the initial submission of requests to the Deans and Vice Presidents will be determined by each Dean and Vice President. Each Dean and Vice President will evaluate the requests, and will possibly group and combine overlapping requests. Funding Requests are due to the UBFC from the Deans and Vice Presidents by 5:00 pm on Friday, January 15, 2016. Funding Requests received after that deadline most likely will not be considered by the UBFC.

2. This Funding Request Form is for:
   • Requests for new continuous funding. Requests will be considered for internal funding or inclusion in the University’s state budget request to the SBOE for the fiscal 2018 budget.
• Requests for new one-time funds. Requests will be considered for inclusion in the SBOE’s request to the legislature for the fiscal 2018 budget or will be considered for funding through internal resources and/or re-allocations during fiscal year 2017.

3. This first cycle of requests will be evaluated by the UBFC based on their alignment with one or more of the goals for the UI announced by President Staben:
   • Transformative Education – Improving recruitment and/or retention
   • Ideas that Matter – Accelerating research success
   • Building our Team – Investing in our people

These goals were announced by President Staben in his address to the University Faculty on September 16, 2015 and in his State of the University address on October 5, 2015. Both speeches can be streamed from the president’s website at http://www.uidaho.edu/president/communications/presentations. A one page summary of the goals is included with this memo and the Funding Request form.

In future years, funding requests will be evaluated based on their alignment with the UI Strategic Plan and the President’s announced goals and plans for implementation of the strategic plan.

4. The Funding Request Form includes a request for basic budget information. In addition, the form contains a Budget Detail worksheet. The Budget Detail worksheet is not linked to the Funding Request. Completion of Budget Detail worksheet is not required in order for the UBFC to consider a Funding Request. However, if a Funding Request is prioritized to become part of the University’s budget request to the SBOE, the detailed budget information will be required.
**Funding Request Form**

**Request Title**

**Primary Requester/Unit:**

**Unit Administrator Approval**
(Dean/VP)

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**FUNDING REQUEST DESCRIPTION** - Describe the initiative and the goals behind this funding request. (1000 characters or less)

**TOTAL FUNDING REQUESTED:** $86,861

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**BUDGET RECAP**

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**SUPPLEMENTAL FUNDING:** Will you be reallocating Unit funding towards this initiative as well? If so please indicate the amounts by year:

**UNIT FUNDING:**

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**FUNDING REQUEST TYPE** - What is this request for?

- Project: Are there any ongoing costs as a result of this project?
  - YES
  - NO

- New service or program - ongoing/permanent
  - Specify length:

- Increased support for existing service or program - ongoing/permanent
  - Specify length:

- Increased support for existing service or program - fixed length
  - Specify length:

- Other
  - Describe

**RATIONALE** - Why is this initiative being pursued? (1000 characters or less)

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**ALIGNMENT WITH ONE OR MORE OF THE PRESIDENT’S GOALS** (Transformative Education, Ideas that Matter and/or Building the Team) (500 characters or less)

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**RISK** - What are the risks associated with this initiative, if it receives funding from this request? (500 characters or less)

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**RISK** - What are the risks if this request is not funded? (250 characters or less)

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**SUSTAINABILITY/LONG TERM PLAN** - Address any long term funding plans for this initiative. Is this initiative expected to produce a return on investment? If so, how long will it take before a return is realized? How will this initiative be sustained if it continues to grow and improve? What is the plan if the initiative is unsuccessful? (1000 characters or less)

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**OUTCOMES ASSESSMENT** - Provide sample metric(s) or quality measurement(s) that will indicate that the funding received successfully accomplished the goals of the initiative. (500 characters or less)

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**Request Date**

5,000.00 $ 5,000.00 $ 5,000.00 $ 15,000.00 $
**BUDGET REQUEST DETAIL**

This form is not required for initial submittal but may be used as a tool for developing totals for the Budget Recap section of the required Funding Request Form - this is not linked to the required form/total must be carried over manually.

Fill in white areas below. Add as many additional lines as needed.

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| REQUEST TOTAL                             | $28,954        | $28,954       | $28,954       | $86,861     |

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<th>YEAR 3 AMOUNT</th>
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<td>$5,000</td>
<td>$5,000</td>
<td>$15,000</td>
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| TOTAL SUPPLEMENTAL FUNDS                       | $5,000         | $5,000        | $5,000        | $15,000     |
ANNUAL PERFORMANCE EVALUATIONS AND SALARY DETERMINATION OF FACULTY MEMBERS

AND

PERFORMANCE EVALUATION OF ACADEMIC ADMINISTRATORS

PREAMBLE: This section contains those policies and their attendant procedures for those periodic reviews of performance that affect faculty members and academic administrators. Policies concerning performance evaluation were part of the original 1979 Handbook, but were completely rewritten in July 2002 and further refined in 2003. In July 2007 Form 1 underwent substantial revisions to address enforcement and accountability issues in the UI promotion and tenure process as well as align the form with the Strategic Action Plan. In January 2008 Form 1 was again revised to include a Disclosure of Conflicts statement to comply with FSH 6240. In 2009 this section was again revised to reflect recent changes to the faculty position description and evaluation forms to better integrate faculty interdisciplinary activities. In July 2010 B was added and FSH 1420 E-6 was incorporated into D to consolidate the evaluation process into one policy. In July 2014 changes were incorporated to ensure all faculty go through a review by their peers. Further information may be obtained from the Provost’s Office (208-885-6448). [ed. 7-03, rev. 7-07, 1-08, 7-09, 7-10, 7-14]

CONTENTS:

A. Annual Performance Evaluation and Salary Determination for Faculty Members
B. Performance Below Expectations of Non-tenured Faculty Members
C. Performance Below Expectations of Tenured Faculty Members
D. Performance Evaluation of Academic Administrators
E. Sequence of Evaluation of Faculty Members and Administrators.

A. ANNUAL PERFORMANCE EVALUATION AND SALARY DETERMINATION FOR FACULTY MEMBERS.

A-1. PERFORMANCE EVALUATION. Annual evaluation of the performance of each member of the faculty is primarily the responsibility of the faculty member and her/his unit administrator. Each unit will develop criteria in its bylaws for third-year and periodic review of its faculty (FSH 1520 II Section 1). The committee for all reviews will be defined in unit bylaws and will include tenure-track faculty (see FSH 3560 E-2 c). The materials listed in FSH 3560 E-2 a and b are critical and used by review committees when considering progress towards promotion (FSH 3560) and/or tenure (FSH 3520). The provost is responsible for preparing supplementary instructions each year, including the schedule for completion of the successive steps. The form to be used, “Annual Performance Evaluation Form 1: Evaluation of Faculty,” is appended to this section. Personnel on international assignment see FSH 3380 C. [rev. 7-03, 7-09, 7-14, ed. 7-10]

a. Forms Distributed. Supplies of the form to be used in the evaluation process are procured by deans and unit administrators. The immediate administrative officer is responsible for ensuring that each faculty member receives the proper form together with a copy of the supplementary instructions. [rev. 7-01]

b. Performance levels for each criterion are described as follows: [ed. 7-10]

i. Exceptional Performance (5) is extraordinary performance well beyond that required relative to the position description.

ii. Above Expectations (4) represents performance that is better than expected relative to the position description. [ed. 7-09, 7-10]

iii. Meets Expectations (3) is the performance expected of a faculty member relative to the position description.

iv. Below Expectations (2) denotes performance that is less than expected of a faculty member relative to the position description and means improvement is necessary. A rating of below expectations in one or more criteria triggers procedures outlined in 3320 B or C. [rev. 7-09, 7-10]
v. Unacceptable Performance (1) is performance that is not acceptable relative to the position description and/or is inconsistent with the conditions for continued employment with the institution. Failure to meet these standards in any of the following ways will result in a rating of unacceptable performance: [rev. 7-09]
   a) received a “1” rating the previous period but did not make the improvements required;
   b) consistently violated one or more of the institution’s standards for meeting the expectations of the position; or
   c) violated one or more standards of conduct as specified in the Faculty-Staff Handbook.

c. Annual Report of Efforts and Accomplishments by Faculty Member. Each faculty member shall provide his or her unit administrator with the following materials for use in the annual performance evaluation:
   (1) Current Curriculum Vitae
   (2) UI Faculty Position Description for Annual Performance Review
   (3) Written detailed summary report of faculty activity for the period of the annual performance review that compares accomplishments to expectations in the Position Description for the period under review [rev. 7-09]
   (4) Other materials necessary to document efforts and accomplishments for the period under review. [add. 7-01, ed. 7-10]

d. Evaluation of Faculty by Unit Administrators. Unit administrators evaluate their faculty members. The performance of each faculty member during the review period is judged on the basis of the position description(s) in effect during that period. In the case of a faculty member holding joint appointments and/or involved in interdisciplinary activities, as described in the position description, in two or more academic or administrative units, it is the responsibility of the administrator in the faculty member’s primary academic discipline to solicit and consider relevant information on job performance from other administrators with responsibility for the faculty member’s work. [See also 3080 E-3.] [rev. 7-09, ed. 7-10]

Ratings are determined by comparing the faculty member’s performance to the position description. The results of the student evaluation of teaching are carefully weighed and used as a factor in this evaluation. For each area of responsibility, the unit administrator shall describe the basis for her/his evaluation in assessing the faculty member’s performance. The ratings and narrative are entered as indicated on the form. The annual evaluation score for a faculty member in Form 1 relates to the faculty member’s performance relative to his/her position description. The overall unit average is provided to the faculty member upon request so that each faculty member can gauge his/her performance relative to other faculty members within the unit. After the unit administrator has completed ratings and narratives for all faculty for the review period, he or she shall provide the following items to each reviewed individual as they become available: [rev. 7-03, 7-09]
   (1) a copy of the individual’s annual evaluation form and narrative [rev. 7-09]
   (2) if requested, comparative information to help assess performance evaluation and numerical ratings, including, but not limited to: [rev. 7-09]
      (a) Frequency distribution for overall ratings for the unit
      (b) Frequency distribution for overall ratings for the college [rev. 7-97, ren. and rev. 7-01]

e. Self-Evaluation and Conference. Each faculty member is given an opportunity to use the evaluation form (FSH 3320 Form 1) to make an evaluation of his or her own performance. The unit administrator shall provide each faculty member with the opportunity to meet to discuss the unit administrator’s evaluation. (Suitable alternate arrangements are made for off-campus personnel.) The purpose of this meeting is to review and discuss the administrator’s evaluation and the self-evaluation, if any. The unit administrator explains his or her ratings and narrative providing a formative assessment on progress towards tenure, promotion, and/or continued satisfactory performance related to the faculty member’s performance during the year and any revisions in professional goals and objectives for the coming year. The faculty member and the unit administrator work to identify strategies to help the faculty member improve performance. The ratings may be modified as a result of the discussion. At the conclusion of the review process, each faculty member shall sign
the evaluation form indicating that she/he has had the opportunity to read the evaluation report and to discuss it with the unit administrator. If the faculty member disagrees with the contents of the review, he/she shall be permitted to append a report to the unit administrator’s evaluation, detailing the nature of the dissent. A copy of the administrator’s final evaluation is given to the faculty member. [ren. and rev. 7-01, rev. 7-09, ed. 7-10]

**f. College-Level Action.** Copies of the performance evaluation materials forwarded by the unit administrator to the appropriate dean(s), for evaluation at the college(s) level, shall include: [rev. 7-09]

- a narrative evaluation on progress towards tenure, promotion, and/or continued satisfactory performance, [rev. 7-09]
- any evaluative comments provided by interdisciplinary/center administrators or from those administrators of faculty holding joint appointments, and [rev. 7-09]
- the evaluation form, [rev. 7-09]

If the unit fails to attach the narrative evaluation and evaluative comments, the college will return the materials to the unit. [add. 7-09, rev. 7-10]

If the faculty member files a dissent, the unit shall provide a copy to the dean. The dean shall arrange a meeting with the unit administrator and the faculty member to attempt to resolve the relevant issues. The dean enters an evaluation in the space provided on the evaluation form. A copy of that form is given to the faculty member and the original is forwarded to the Provost's Office for permanent filing [see FSH 1470 and APM 65.02]. A copy of the evaluation form is retained in the college office. If the dean concurs with the overall evaluation and rating of the faculty member by the unit administrator, no additional signature is required from the faculty member. [rev. 7-09, 7-10]

If there are any differences in any rating between the unit administrator and college dean, the dean shall attach a narrative stating the reasons for these differences, and a second and subsequent signature by the faculty member, acknowledging receipt of the dean’s evaluation and rating, is required. The college shall forward the original evaluation form and narrative to the Provost's Office for permanent filing. If the college fails to attach the narrative, the provost will return the form to the college. A copy of the evaluation form is retained in the college office. If the faculty member disagrees with the Dean’s evaluation and the disagreement cannot be resolved at the college level, either party may choose to refer the matter to the University Ombuds (FSH 3820). If the matter remains unresolved at the college level, the Provost shall be notified of the disagreement. [ren. and rev. 7-01, rev. 12-06, 7-09, 7-10]

**A-2. SALARY DETERMINATION.** This process is carried out at the departmental and higher levels of academic administration. [see FSH 3420.] [rev. 7-09]

**B. PERFORMANCE BELOW EXPECTATIONS OF NON-TENURED FACULTY MEMBERS.** [add. 7-10]

**B-1.** If the unit administrator determines that a non-tenured faculty member is performing below expectations, the unit administrator should consider the variety of possible causes, other than inadequate effort on the faculty member’s part, that might be responsible for the performance. (see FSH 3190) [ed. 7-09, rev. 7-10]

*It is not The unit administrator, in consultation with the faculty member, should address identifying the possible is role in diagnosing the causes of the problem, but should suggest sources of appropriate resources professional help and encourage the employee to seek such such help[http://www.uidaho.edu/benefits/]. Faculty members and unit administrators may obtain referral information and advice from the University Ombuds and Human Resources. [ed. 12-06, 7-09, 7-14]*

**B-2. FIRST ANNUAL OCCURRENCE.**

**a.** In the event that a non-tenured faculty member receives an annual evaluation concluding that he or she has performed below expectations (2 or lower) within one or more areas of responsibility, the unit administrator will, at the same time he or she delivers the performance evaluation, offer to meet with the faculty member to
identify the reasons for the performance below expectations. At this meeting, the faculty member and the unit administrator will review the current Position Description and examine strategies that would permit the faculty member to improve his or her performance. [rev. 7-09, 7-10]

b. In the event that a non-tenured faculty member receives an annual evaluation concluding that he or she has performed below expectations (2 or below) in the overall score, the unit administrator will, at the same time he or she delivers the performance evaluation, offer to meet with the faculty member to identify the reasons for evaluating the performance as below expectations. At this meeting, the unit administrator will appoint a mentoring committee by selecting three individuals from a list of five faculty members nominated by the faculty member, or if the faculty member makes no nominations, will appoint three faculty members of her/his choosing. The mentoring committee’s purpose is to help the faculty member improve performance. The members of the committee need not be drawn from the same unit as the faculty member. The faculty member or unit administrator may request that the University Ombuds attend meetings of the mentoring committee and faculty member. [ed. 12-06, rev. 7-09, 7-10]

B-3. TWO CONSECUTIVE ANNUAL ASSESSMENTS OF BELOW EXPECTATIONS. In the event of two consecutive annual evaluations concluding that the non-tenured faculty member has performed below expectations overall or within one or more areas of responsibility (2 or lower) the unit administrator will, at the same time he or she delivers the performance evaluation, arrange a meeting of the faculty member, the unit administrator and, in the unit administrator’s discretion, the Dean of the College. The faculty member or the unit administrator may request that the University Ombuds attend the meeting. [ed. 12-06, rev. 7-10]

The intent of the meeting is to review:

a. the current position description and revise it if necessary to address the issues identified during the discussion. [ed. 7-09]

b. the strategies implemented in the previous year and to identify why the strategies did not result in the faculty member meeting expectations. The parties should re-examine strategies that would permit the faculty member to improve his or her performance. [ed. 7-09]

C. PERFORMANCE BELOW EXPECTATIONS OF TENURED FACULTY MEMBERS. Tenured faculty will follow the same process as described in B-1 through B-3 above. In addition, to identify and address specific problems early on, a tenured faculty member may be subject to a review as described in C-1 and C-2 below. The purpose of C-1 and C-2 is to assist the faculty member with getting back on track.

C-1. ANNUAL ASSESSMENT OF BELOW EXPECTATIONS. In the event a tenured faculty member receives an annual evaluation of below expectations, the procedures described in B-1 through B-3 above will apply. In the event of an overall score of 1, the provost may determine that further review of the faculty member’s performance is required. This review will be conducted in accordance with the procedures prescribed in 3320 C-2. [ren. and ed. 7-09]

C-2. THREE CONSECUTIVE ANNUAL ASSESSMENTS OF BELOW EXPECTATIONS. In the event of three consecutive annual evaluations below expectations overall or within one or more areas of responsibility, or a pattern of below expectations evaluations over five years (a summary score of 2 or lower), the Dean shall initiate a formal peer review. [rev. 7-09, ren. 7-10]

a. Composition of the Review Committee. The Review Committee will consist of six (6) members, appointed as follows:

(1) The Faculty member will submit to the unit administrator a list of the names of three faculty members from within the unit and three tenured faculty members from outside of the unit. The unit administrator will submit a similar list to the faculty member. From the list given to the faculty member, he/she will select one person from inside of the unit and one from outside the unit. From the list given to the unit administrator, he/she will select one person from inside of the unit and one from outside the unit.
(2) The committee members will select as chair another faculty member from within the unit.
(3) The Ombuds or his/her designee shall be an ex-officio member of the committee. [ed. 12-06]

b. Timing of the Review. The review and recommendation(s) will be completed within sixty days of the annual evaluation.

c. The Review. The purpose of the review is to assess the level of performance of the faculty member and the unit administrator’s evaluation of that performance. To that end, the committee shall assess the reasonableness of the previous evaluations and the appropriateness of the development plans, as well as any material submitted by the faculty member and the unit.

The faculty member and chair will provide the following materials to the committee:
- Updated Curriculum Vitae of the faculty member
- Position Descriptions for the past four years
- Annual evaluation materials submitted by the faculty member for the past three years
- Annual Evaluations of the faculty member by the unit head and the Dean for the past three years
- Student and peer evaluations (if any) of teaching for the past four years
- A self-evaluation of teaching
- A self-assessment summary of what the faculty member has learned and achieved during the past four (4) years, including contributions to the department, university, state, nation, and field (about 2 pages).

The faculty member may submit any additional information he or she desires, and the committee may request additional materials as it deems necessary.

d. Responses to Committee Report. The faculty member, chair, and dean will receive the report and will have fifteen days from the report’s date to submit written responses to the review committee. The review committee will send the report and all responses to the provost.

e. Provost. The Provost will be responsible for determining the appropriate resolution, which may include: [rev. 7-09]
   1) continuing the status quo;
   2) mentoring to address area(s) of concern;
   3) termination for cause;
   4) consideration of other recommended resolution(s). [1-4 add. 7-09]

D. PERFORMANCE EVALUATION OF ACADEMIC ADMINISTRATORS. [ed. 7-09, ren. 7-10]

D-1. EVALUATION BY FACULTY MEMBERS. Opportunity is provided for an annual performance evaluation of college deans, assistant and associate deans, and administrators of academic departments and other intracollege units by the faculty members of the respective units. The provost sends each faculty member an appropriate number of copies of the form, “Annual Faculty Evaluation of Academic Administrators” [form 2 appended to this section] to be used for evaluation of the unit or center administrator, one to be used for evaluation of the dean, and one to be used for evaluation of each assistant or associate dean in the college. [ren. & ed. 7-10, 10-10]

D-2. EVALUATION OF UNIT AND CENTER ADMINISTRATORS AND ASSISTANT AND ASSOCIATE DEANS. The review and evaluation of unit and center administrators, and assistant and associate deans, require consideration of their responsibilities as faculty members and as administrators as defined by percentage allocations in the Annual Position Description. All administrators are entitled to a review and evaluation of their performance as faculty members. Further, all administrators are entitled to a review of their performance as administrators. (Forms to be used in the evaluation of administrators are found in Form 1 and 2. [rev. 7-99, ed. 3-07, rev. & ren. 7-10 (incorporated 1420 E-6 into this entire section D-2 through D-4)]
1. Evaluation as a Faculty Member.

   a. **Annual Evaluation.** The annual evaluation of an administrator’s performance as a faculty member shall be conducted by the dean of the college in accordance with the provisions of *FSH 3320* A above.

   b. **Third Year Review.** If the administrator is untenured, there shall be a third-year review in accordance with the procedures outlined in *FSH 3520* G-4.

2. Evaluation as an Administrator.

   a. **Annual Evaluation.** The dean shall conduct an annual evaluation of each administrator’s performance in accordance with the responsibilities specified in *FSH 1420* E-1 and in the Annual Position Description. The dean and administrator will negotiate the administrator’s Annual Position Description on the basis of the unit’s needs, and make it available to the faculty for annual evaluation purposes. The administrator will present his or her annual goals for the unit at the beginning of the review year and report on his/her effectiveness in meeting last year’s goals. Annual goals should be based on the unit action plan, needs of the unit, and discussion with the dean. The dean will make a conscientious effort to solicit input from unit faculty through evaluation form 2. [rev. 7-99, ed. 6-09, 10-10]

   Unit faculty must send completed copies of form 2 directly to the dean. The dean furnishes the administrator a summary of the faculty evaluations in such a way that the confidentiality of individual evaluations is preserved. The dean may arrange a conference with the administrator to discuss the summary. After these steps have been completed, the dean shall destroy the individual faculty members’ evaluations and shall file the written summary in the dean’s office. The dean then submits a summary of conclusions and recommendations resulting from the review to the provost, who in turn makes his or her review and forwards recommendations to the president. The dean will then provide feedback to faculty who have submitted form 2, as appropriate. [ed. 10-10]

D-3. **EVALUATION OF DEANS.** The provost shall conduct an annual evaluation of each dean's performance in accordance with the dean’s responsibilities specified in *FSH 1420* D-2 and in the Annual Position Description. The provost and dean will negotiate the Annual Position Description for the dean on the basis of the college’s needs and make it available to the faculty for annual evaluation purposes. The dean will present his or her annual goals for the college at the beginning of the review year and report on his or her effectiveness in meeting last year’s goals. Annual goals should be based on the college’s action plan, needs of the college, and discussion with the provost. The provost will make a conscientious effort to solicit input from college faculty through evaluation form 2. [ed. 10-10]

College faculty will send completed copies of form 2 directly to the provost. The provost will summarize the faculty responses and share that summary with the dean. In preparing and conveying that summary, the provost has the responsibility to ensure that faculty comments are confidential. This includes, but is not limited to, avoiding the use of any phrases that can identify the faculty member making the comments. The provost may arrange a conference with the dean to discuss the summary. After these steps have been completed, the provost shall destroy individual faculty members’ evaluations and file the written summary in the Office of Academic Affairs. The provost must then submit a summary of conclusions and recommendations resulting from the review to the president. The provost will then provide feedback to faculty who have submitted form 2, as appropriate. [ed. 10-10]

D-4. **PERIODIC REVIEW OF ADMINISTRATORS.** Each administrator is formally reviewed at least six months before the end of each appointment term, or, if there is not a fixed appointment term, at least every five years. The Provost appoints an ad hoc review committee to include faculty, department chairs, and experienced
administrators of other units. The periodic review will be conducted at the request of the Provost and Executive Vice President and in accordance with the mechanisms of formal review, which must provide for the following:

1. Opportunity for the dean, center administrator, or unit administrator to prepare a report/portfolio summarizing his or her administrative achievements for the period, including annual reviews; [rev. and ren. 7-99]

2. Opportunity for all faculty and staff of the college/unit to participate in the review;

3. Solicitation of input by the committee from appropriate constituencies of the college/unit. Confidentiality of all individual evaluations will be ensured; [add. 7-99]

4. Preparation by the review committee of a written report summarizing the findings and recommendations of the review, which will be forwarded to the Provost and the dean/center or unit administrator; [ed. and ren. 7-99]

5. The provost will submit the written report along with any additional comments and recommendations to the president and provide appropriate feedback to the administrator. [rev. and ren. 7-99]

a. Additional Review. The provost and/or college dean may initiate a review at any time he or she determines a review is needed. The dean shall submit to the provost a summary of conclusions and recommendations resulting from this additional review. If the review is conducted by the provost, he or she shall submit a summary of conclusions and recommendations to the president.

The faculty of the unit may also initiate, by majority vote, a formal review (as outlined above) of the unit administrator. The tenured faculty of a college may also initiate, by majority vote, a formal review (as outlined above) of the college dean.

E. SEQUENCE OF EVALUATION OF FACULTY MEMBERS AND ADMINISTRATORS. The provost prepares the schedule for completion of steps in the performance evaluation and salary determination process each year. The schedule will ensure that faculty members’ evaluations of unit or center administrators and assistant and associate deans have been received by the dean before the administrators’ recommendations on salary, promotion, and tenure are made known to the faculty and, similarly, that faculty members’ evaluations of deans have been received by the provost before the deans’ recommendations on salary, promotion, and tenure are made known to the faculty. Likewise, the summaries of faculty evaluations of unit or center administrators, assistant and associate deans, and deans will be communicated to the persons evaluated after their recommendations on faculty salary, promotion, and tenure have been transmitted to the provost. [ren. & rev. 7-10]

(Forms on next few pages)

*NOTE: In October of 2010 it was determined that elimination of Form 2A was possible with minor edits to Form 1 (addition of reference FSH 1420 E to box 4). As such, Form 1 may be used in lieu of Form 2A by administrators, if desired. Given this change, form 2B becomes Form 2 (see the UI Policy website for redline versions or contact the Faculty Secretary's Office or Provost's Office for further clarification).