University of Idaho
2018-2019 FACULTY SENATE AGENDA

Meeting #18

3:30 p.m. - Tuesday, February 5, 2019
Paul Joyce Faculty-Staff Lounge & Zoom

Order of Business

I. Call to Order.

II. Minutes.
   • Minutes of the 2018-19 Faculty Senate Meeting #17, January 29, 2019 (vote)

III. Consent Agenda.

IV. Unfinished Business and General Orders.

V. Other Announcements and Communications.

VI. Committee Reports.

   University Curriculum Committee (UCC) (vote)
   • FS-19-055 (UCC-19-045) – New Minor Plant Protection (Edwin Lewis)
   • FS-19-056 (UCC-19-046&018) – Agricultural Commodity Risk Management Certificate (Terry Grieb)
   • FS-19-057 (UCC-19-047) – Masters of Accountancy (Darryl Woolley)
   • FS-19-058 (UCC-19-048) – FSH 1640.91 – UCC Structure Change add Law (Jerrold Long)

VII. Special Orders.

VIII. New Business.
   • FS-19-053 - FSH 3340 – Performance Evaluation of Staff Employees (Wes Matthews)
   • FS-19-054 – APM 50.21 – Documenting and Addressing Unsatisfactory Performance of Classified Staff (Wes Matthews)

IX. Chair’s Report.

X. Provost’s Report.

XI. Adjournment.

Professor Aaron Johnson, Chair 2018-2019, Faculty Senate

Attachments: Minutes of 2018-2019 FS Meeting #17
FS-19-053 through FS-19-057
University of Idaho
Faculty Senate Meeting Minutes
2018-2019 Meeting #17, Tuesday, January 29, 2019

Present: Benedum, Brandt (w/o vote), Cannon (Boise), Caplan, Chopin, DeAngelis, Dezzani, Ellison, Flores (for Kirchmeier w/o vote), Grieb, Jeffrey, Johnson, Keim, Kern (Coeur d’Alene), Lambeth, Luckhart, Lee, Lee-Painter, McKellar (Idaho Falls), Morgan, Raja, Schwarzlaender, Tibbals, Tengono (for Laggis w/o vote), Vella, Wiest, Wiencek. Absent: Bridges, Kirchmeier, Laggis, Seamon Guests: 12

Call to Order and Minutes. The chair called the meeting to order at 3:32 pm. A motion to approve the minutes (Lee-Painter/Dezzani) passed unanimously.

Chair’s Report.

- The chair called senators’ attention to the memo distributed by President Staben encouraging members of the university community to keep our values in mind during these stressful times.
- An Open Forum regarding changes in UI’s General Education Curriculum will be held Friday February 1 at 10:30 PST/11:30 MST in the Clearwater/Whitewater Rooms at the Commons. A ZOOM link will be available so all can join the meeting. The forum will address issues with UI’s current General Education program, including the pending proposals to eliminate ISEMs. This is a chance for faculty to engage in the discussion of our general education curriculum.
- The deadline for staff council award nominations has been extended to February 22. The chair encouraged senators to nominate deserving staff.
- The Center for Excellence in Teaching and Learning (CETL) is launching an effort to improve and bolster teaching on campus through a faculty spotlight series. Workshops in this series will be held on February 6, March 20, and April 10. Each workshop will begin at 10:00 am (PT) and will be held in Education 341. ZOOM links for each workshop are available. Details and registration links for these and other CETL-sponsored workshops are available at the CETL WebPage.

Provost Report.

- The provost reiterated the chair’s comments regarding President Staben’s memo. There is a high level of stress and uncertainty within the university community resulting from the presidential transition and pending budget processes. He encouraged productive participation in the workplace and reminded senators that the president’s memo contains details about supportive resources.
- Regarding general education the Provost stated that ISEMs are not going away unless faculty support that outcome. He stated that the Director of General Education has details and data available on our ISEMs that relate to regional accreditation and will be leading a discussion about changes that may be needed.

A senator commented to the provost regarding a recent memo to faculty and staff regarding international travel. She stated that she and her colleagues found the tone of the memo punitive because it appeared to threaten that if faculty do not know of international travel plans for the coming year and report those plans, travel reimbursement would not be available. She indicated that at this time, many faculty are not aware of possible international travel opportunities that may arise during the coming year. Moreover, she indicated that the memo created a perverse incentive for faculty to over-estimate their possible international travel in order to make sure they would be reimbursed. The provost was familiar with the memo. It was circulated as part of an effort to quantify university sponsored international travel for purposes of securing insurance. He indicated that he would follow up on it.
**Provost Report on Budget.** The provost began his report by noting that cutting budgets is always a very difficult exercise. The deans all represented their colleges and made very strong cases for college priorities. Nonetheless, in the end the division of academic affairs has a target it must meet. The provost worked to make budget decisions in as transparent a way as possible, based on data and equity considerations. He stressed that the key to resolving the university’s budget situation is to increase enrollment.

The provost first reviewed the reasons for the current budget cuts. In fall 2017, Vice President for Finance and Administration Brian Foisy reviewed the looming budget situation for the university community at a Presidential Leadership Breakfast. At that time, Foisy proposed one-time solutions for FY18 and FY19. He also announced that he was convening a committee to examine approaches to a permanent adjustment in base funding beginning in FY20 (July 1, 2019). We are now at the point of implementing the recommended adjustments to base budgets.

The current budget situation is largely attributable to declining enrollment. This decline has been masked in some way because the State Board of Education (SBOE) has counted dual enrollment students in UI’s enrollment figures. Such dual enrollment students pay vastly reduced tuition rates as the result of state incentive programs. For simplicity, the provost referred to all other than dual enrollment students as “degree-seeking students.” Excluding dual enrollment students, UI’s enrollment of degree-seeking students has declined steadily since 2011. The decline stabilized three years ago, but degree-seeking student enrollment declined again last fall.

The UI general education budget is comprised of state appropriations and revenue from tuition. While our budget office has firm information regarding general appropriation revenues, it must estimate tuition revenue. If tuition revenue falls short of the estimate, the UI has covered the shortfall using budget reserves. The expectation has been that when enrollment increases, budget reserves will be replaced. The problem has been that we have over-estimated tuition revenues every year since 2011. As a result, our reserves have decreased to a dangerously low level. The result is that UI now has a structural deficit of $3 million. This structural deficit must be addressed now by reducing base budgets going forward.

A senator asked why the university makes more money on full tuition compared to tuition paid by the credit hour by part-time students. The provost clarified that he included both full-time and part-time students as degree-seeking students. His estimates are based on full-time equivalent students. Foisy added that enrollment reports are just convenient corroborating evidence for our tuition receipts. He explained that tuition revenue is impacted by many individual circumstances such as whether individual students are in the Western University Exchange (WUE) program or whether they receive other tuition waivers. The budget office does not look at the exact tuition due from every individual student in quantifying tuition revenue. Rather it looks at overall tuition revenue compared to enrollment reports to ensure that the trends in enrollment and tuition receipts make sense.

A senator asked what we are doing about the continuing drop on college eligible students and what plans are we making to reach other audiences. Her point was that the university may be missing opportunities to recruit more students who are veterans. The provost responded that he endorsed her sentiments. He indicated that Strategic Enrollment Management (SEM) is working on these issues. He also offered to put the senator in touch with the appropriate staff members in SEM. He added again that increasing enrollment is definitely “the take home message” of his remarks.

The provost continued to explain that the overall budget shortfall is $5 million. He also explained that the SBOE wants a report on how Program Prioritization (PP) is being used to drive reallocation and priority setting at UI. He relied on PP to assign the cuts at the executive level. Based on PP the budget cut in
academic affairs is $3.6 million. If he had not relied on PP and had, instead, endorsed an across-the-board cut, the cuts to academic affairs (including the colleges) would have been higher.

A senator asked how the $5 million total amount of the budget cut was calculated. The provost responded that the structural deficit accounts for $3 million. Also included is a $2 million budget reallocation based on priorities identified by the University Budget and Finance Committee (UBFC) and by the president.

A senator added that the committee convened by VP Foisy recommended that the base budget adjustment should be based on a conservative estimate of the structural budget shortfall. Otherwise, the committee believed that the institution would experience “death by a thousand cuts” when future budget shortfalls occurred. The hope is that new continuing cuts in base budgets will not be necessary.

The provost also added that within academic affairs a reallocation must take place to support the new shared advising unit. He stressed that no new positions are being created. Rather positions are being transferred to the unit. The problem is that some colleges do not have advisors that can be transferred. Because the cost of the central shared advising model that will be allocated across the colleges, some colleges will benefit from the reallocation while others will not. The provost pointed out that the shared advising model was included in the budget reallocations. Shared advising will be funded through $519,921 reallocated from the colleges and $536,065 from the provost’s office.

The provost organized the academic affairs budget cuts by dividing academic affairs into two groups. The first he termed “academic units” including the nine academic colleges (he did not include the College of Graduate Studies (COGS) in this group). The second group was termed the “non-academic units” and includes SEM, COGS, student affairs, provost office operations, the library, and the UI centers. The provost acknowledged that the title “non-academic” did not truly apply to the units in this second group. He used the title for ease of reference and did not mean to imply that the units in the second group such as the library were not academic units. The aggregate budget reduction for non-academic units in academic affairs is $1.2 million or 4.23%. The aggregate reduction for the academic units in academic affairs is $1.98 million or 3.31%.

The provost next addressed how the aggregate reduction was allocated across individual units. The deans agreed with the approach recommended by VP Foisy’s budget committee that the amount of the reduction be conservatively estimated so that units would not have to face ongoing annual reductions in budgets. Deans also expressed concern that some units might not have to share in the budget cut. Every unit will participate in the reduction at some level. The provost also was committed to reducing budgets strategically and not making an across-the-board reduction. He noted that currently some colleges have either a structural deficit or are on the brink of such a deficit. He did not want the current budget process to push such colleges into further deficits, creating more problems in the future. Finally, he stressed that the deans made excellent cases for budget priorities in each of the colleges.

For the non-academic units, the provost has recommended budget reductions that are comparable to the academic units (not considering the shared advising reallocations). The exact allocation to each unit was made considering the PP rankings.

For academic units, he followed a different approach. First, he looked to nationally normed information regarding the cost of instruction at peer institutions available through the Delaware Cost Study (DCS). He also considered the mission centrality criteria from PP. He noted that other portions of the PP rankings were subjected to substantial criticism. Many characterized the data as merely a popularity contest. For this reason he limited his consideration of PP data to the mission centrality data. He did not use this information in a formulaic way, but rather had detailed dialogs with each dean.
The provost concluded this portion of his presentation by noting that he is optimistic that we can turn around enrollment. He admitted that the UI has struggled in the past to develop an effective approach to enrollment management. He stated that he believes that, having implemented needed changes in our approach to enrollment management, we are making progress.

The provost next addressed future adjustments. He has implemented a university-wide faculty hiring process. In the past, colleges and often units, kept vacant faculty lines. The provost has decided that vacant faculty lines should now return to the central administration. Such a process will be driven by strategic conversations with the deans, both individually and collectively, to determine the best possible utilization of limited university resources.

The provost also stated that the finance model is going to change to a new approach based on recommendations from the finance committee recently chaired by Vice President of Finance, Brian Foisy. The provost will continue to use data to inform financial decisions. As part of future analysis, the provost will be considering a few options for program level cost benchmarking including the DCS approach. There are other approaches utilized which can be considered, such as a combined benchmarking and program review process utilized by Notre Dame University.

Additional refinements to future analysis will pursue a more disciplined conformance to the Delaware Cost Study data definitions. For example, the student credit hours (SCH) will accrue to the academic department paying the instructor’s salary instead of the catalog “home” of a given course. UI’s current systems pose some challenges for this detailed DCS process that can be resolved given more time.

Finally, the provost is working to provide as much information as possible to the college. He expects the information to be considered as colleges work on cascaded strategic plans and as UI re-calibrates the PP process. However, he stated that it would be some time before information dashboards are available. He expects to circulate a memo summarizing this presentation including links to the slides to the entire campus community. He also plans to sponsor a webinar to delve into the issues further and provide an opportunity for questions.

A senator asked how the university can afford investments such as VandalStar in the face of the deficits outlined by the provost. The provost responded asking “how can we not afford it?” UI’s enrollment is not growing. Sitting back and hoping for change is not a strategy!

Another senator asked what policies are changing to foster enrollment growth? He followed up asking whether budget cuts were going to be the ongoing policy response to declining enrollments. The senator noted that if enrollment growth is vital, the university must implement changes. The provost responded that the current budget situation is the result of our failure to stabilize and grow enrollment. He is trying to be positive moving forward. However, he emphasized that in the future, the UI budgeting system must respond to changing enrollments more effectively. When enrollment goes down in programs, budgets must be periodically re-set. He pointed out that UI has rapidly growing programs that have gotten very few new resources. This is an issue. We have let the money sit where it has always been rather than funding these growing programs. The provost emphasized that enrollment changes are often beyond the control of departments or units. Rather they often are driven by external forces such as the job market (i.e. salaries and demand). University employees are working hard. But the demands and interests of society and our state is changing. The university must respond to these changes.
A senator noted that the university currently has a 13:1 student faculty ratio. This low ratio is not supportable on our current level of tuition and state appropriations. He agreed that the university must increase enrollment.

A senator asked what the enrollment benchmarks are and whether there would be consequences for failing to reach those benchmarks. The provost responded that many faculty and staff have expressed frustration with the centralized approach to enrollment and have expressed their belief that colleges can do a better job recruiting new students. However, he pointed out that since the university centralized student recruitment and enrollment efforts, the decline in UI’s enrollment stopped. He stated that the central question is who gets to control how UI recruits and advises students. Infighting between colleges and with the central administration continues to hold the university back. He believes we must come together and support the efforts of SEM. The strategic plan has aggressive targets for enrollment growth. At present he believes UI must stabilize enrollment and aim for 3% annual growth. If the university can do this, it will be in a good budget position in two to three years. The provost also pointed out that the VP for SEM reports to the provost and it is up to the provost to hold him accountable. He concluded by stating that this strategic enrollment management approach now being implemented at UI is not a new and unproven approach. Rather, the university is just now catching up to best practices for recruiting and enrollment. The distributed approach was not working despite our sense that it was successful.

A senator pointed out the U.S. population is declining. Idaho’s population is not growing at 3% (the growth target previously mentioned by the provost). He asked how the university will respond to these long term changes in the population. The provost responded that the number of high school graduates in Idaho is predicted to increase for the next three to four years. He also pointed out that UI is working to attract international students – our partnership with Navitas is an example of those efforts. He stated that he thinks it would be more productive to focus on reversing our current enrollment decline rather than predicting how the state’s population trends will impact UI.

A senator commented that continued cuts are going to hurt students because they will lead to program elimination and increased numbers of instructors compared to tenure track faculty. She also stated that faculty and staff feel that decisions are made with insufficient involvement of faculty and staff. She believes UI is experiencing culture and climate issues as a result of insufficient involvement. She also asked how the other parts of the strategic plan will be advanced in the face of our focus on student credit hours and enrollment. The provost responded asking whether it is really true that students will suffer. This assumes that the institution only make marginal cuts. Even if the current crisis results in program eliminations, such changes may allow the university to provide better student opportunities in the remaining programs. He admitted that he does not have the “magic solution.” Rather, he encouraged senators to deal with the current budget situation and focus on what the university is good at. This will allow the institution to move forward. The provost also reflected on the difficult issues of transparency. He did not invite faculty members into the discussions with deans regarding the budget because he was concerned that such involvement would simply emphasize the concerns of individual colleges and units. Also, the presence of a limited number of faculty in addition to the deans would have given more representation to some colleges than to others. He emphasized that there are still many aspects of the current budget plan that must be worked out and that he is seeking faculty input on these aspects. The provost also agreed that research is not heavily weighted in the current budget calculations.

The senator followed up asking whether the size of the current budget cut could be reduced if UI forgoes some of the UBFC initiatives or other programs such as the Vandal Ideas Projects (VIPs). The provost responded that he did not wish to revisit these issues this year. However, he added that such an approach might be considered in the future. Foisy added that some of the new initiatives are scalable. He agreed that more conversation is needed. The senator responded that she is a faculty member in a college
receiving one of the largest cuts. She suggested that the cuts do not reflect the level of return on investment. The provost agreed that this was a legitimate criticism that he would think more about. He noted that even though the first waypoints of the strategic plan focused on enrollment, many faculty ignored those first steps and jumped to increasing the university’s research. He suggested that UI must recalibrate and reflect on how we value the different parts of our mission. DCS focuses on instructional costs. It includes internally funded research but does not consider external research funding.

After addressing the UI budget plan, the provost addressed the funding of UBFC recommendations. He emphasized that the process of funding is collaborative between administrative priorities and those identified by the administration. He pointed out that some projects not recommended by UBFC were funded because they represented priorities for President Staben and for the administration. A number of requests were included in the UIs legislative request but did not go forward from the State Board of Education to the legislature. VP Foisy explained that the UI legislative request must be carefully packaged to maximize the available legislative funding. He explained that this year a highly recommended request was packaged with several related, but less recommended requests, in order to develop one coherent and sizeable request that capitalized on receiving legislative funding.

A number of additional requests are part of the internal reallocation process. Budget requests for both marketing and advancement were deemed to be priorities by President Staben.

Finally, the provost explained that he has a number of academic program priorities that he has approved and that have been part of the UI’s program and curriculum approval process. He brought the proposals to UBFC in the spirit of transparency. He allocated funding to these programs, even if they were not recommended.

University Curriculum Committee Report:

- **FS-19-047 (UCC-19-038) – Discontinue Process & Performance Academic Certificate.** Senator Michelle Wiest from the College of Science presented the proposal. She stated that the program was the project of the former chair of the Statistics Department. No students have graduated from this program. The proposal passed unanimously

- **FS-19-051 (UCC-19-024 – Joint JD/MPA Program.** Senator Brian Ellison from the Department of Politics and Philosophy explained that this program will provide an opportunity for law students to earn an MPA while also earning a JD. The proposal passed unanimously

The agenda having been completed, a motion (Chopin/Dezzani) to adjourn passed unanimously. The meeting was adjourned at 4:57 p.m.

Respectfully Submitted,

Liz Brandt, Faculty Secretary &
Secretary to the Faculty Senate
## PROPOSAL TO CREATE NEW PLANT PROTECTION MINOR

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Credits</th>
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<tbody>
<tr>
<td>ENT 322</td>
<td>General and Applied Entomology</td>
<td>4</td>
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<tr>
<td>PLSC 338</td>
<td>Weed Control</td>
<td>4</td>
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<td>PLP 415</td>
<td>Plant Pathology</td>
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<td></td>
<td>ENT, PLP, or PLSC courses(^1)</td>
<td>9</td>
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\(^1\)Suggested courses: PLSC 410, PLSC 438, ENT/PLSC Electives

Courses to total 20 credits for this minor
PROGRAM COMPONENT (Group B) OR NON-SUBSTANTIVE MINOR REQUEST FORM (Short Form)

Instructions: Please use one form for each request/action. Clearly mark all changes using either (1) Track Change or (2) strikethroughs for deletions and underlines for additions. Following the approval of the appropriate college curriculum committee, the department chair will e-mail the completed form to gracemiller@uidaho.edu.

Deadline: This form must be submitted by October 1 for inclusion in the next available General Catalog and to be available for scheduling beginning with the next summer session.

When applicable, a Curriculum Change Form and Course Approval Forms must accompany the short form.

Submission Information
This section must be completed

<table>
<thead>
<tr>
<th>Dept Chair Name:</th>
<th>Edwin Lewis</th>
<th>Email:</th>
<th><a href="mailto:eelewis@uidaho.edu">eelewis@uidaho.edu</a></th>
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<tbody>
<tr>
<td>College:</td>
<td>College of Agriculture and Life Sciences</td>
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<tr>
<td>Department/Unit:</td>
<td>Department of Entomology, Plant Pathology and Nematology</td>
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<tr>
<td>Dept/Unit Approval Date:</td>
<td>9/28/2018</td>
<td>Vote Record:</td>
<td>12 yes (4 did not respond)</td>
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<tr>
<td>College Approval Date:</td>
<td>10/1/2018</td>
<td>Vote Record:</td>
<td>Unanimous</td>
</tr>
<tr>
<td>Primary Point of Contact:</td>
<td>Brenda K. Schroeder</td>
<td>Email:</td>
<td><a href="mailto:bschroeder@uidaho.edu">bschroeder@uidaho.edu</a></td>
</tr>
<tr>
<td>Briefly describe the change you are requesting:</td>
<td>Requesting to add a new minor in Plant Protection for the B.S. in Entomology degree</td>
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What is the financial impact of the requested change?

| Greater than $250,000 per FY: | X |
| Less than $250,000 per FY:     |   |

**Note: If financial impact is greater than $250,000, you must complete a Program Proposal form.**

The courses required for this minor are already offered within the EPPN department and being delivered. There is no additional financial impact.

Rationale for Program Component Request or Name Change
This section must be completed

Explain the change you are requesting, and provide a rationale for this request. Include an explanation of how the department will manage the added workload for a new program component; describe whether the program component curriculum and admissions requirements remain the same; describe the rational for a name change or degree designation change, if applicable.

In 2016 the documents were submitted for the bifurcation of Plant Sciences and Entomology, Plant Pathology and Nematology. In those documents was stated that EPPN would put forward a BS. in Entomology. This document is being put forward and the documents is to request the addition of a minor in Plant Protection for this degree.

Name or Degree Change Only Requests
Leave blank if not making a name and/or degree change only request
This section to be completed ONLY for changes to the name of: degree, major, minor, option, emphasis, certificate, teaching endorsement.

<table>
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<th>Current Name:</th>
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<td>New Name:</td>
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<td>Current Degree:</td>
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<td>Other Details:</td>
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<td>Effective Date:</td>
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Please indicate if any course or curriculum changes are occurring as a result of this name or degree change request:  □ Yes  □ No
If there are accompanying curriculum or course changes, complete the next section and attach the curriculum and/or course forms.

**Note: A substantive change to a program degree, major, or program component may require a program proposal form.

Please indicate whether 25% or more of the program learning outcomes are changing:  □ Yes  □ No

**Note: If you answered YES to this question, complete the table below:

<table>
<thead>
<tr>
<th>SLO#1</th>
<th>List Old Learning Outcomes</th>
<th>New Learning Outcome, if changed (if no change, write N/A and move to next outcome)</th>
<th>New Direct Measure (list student work product and explain how it will be evaluated)</th>
<th>Have you updated the assessment cycle to include this change? (yes/no)</th>
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Program Component Request

Leave blank if not adding, discontinuing, or modifying a program component. Program components consist of option, emphasis, minor, academic certificate less than 30 credits, or teaching endorsement.

Clearly mark all changes to existing program components by using either (1) Track Change or (2) strikethroughs for deletions and underlines for additions. A curriculum change form and/or course approval forms associated with this request are required to be submitted with this short form.

<table>
<thead>
<tr>
<th>X</th>
<th>Create New</th>
<th>Discontinue</th>
<th>Implementation Date:</th>
<th>July 2019</th>
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<tr>
<td></td>
<td>Graduate Level</td>
<td>X Undergraduate Level</td>
<td>Law Level</td>
<td>Credit Requirement:</td>
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Are new courses being created: (circle your response)  No  X  Yes  If yes, how many courses will be created:

If the request is for an option or emphasis, enter the associated major and degree:

| Major: Entomology | CIP Code: 01.1105 | Degree: BS |

Enter the name of the program component in the appropriate row:

Option:

Emphasis:

Minor: Plant Protection

Academic Certificate less than 30 credits:

Teaching Endorsement (Major/Minor):

Provide a summary/description of the program component using 50 words or less:

Plant Protection Minor will provide students with an education focused on aspects of Plant Protection including the knowledge of plant, insect and weed pests and the theories of management to control them.

Learning Outcomes and Assessment Information

This section must be completed if program component request section is completed.

1. List the intended learning outcomes for the program component. Use learner centered statements that indicate what will students know, be able to do, and value or appreciate as a result of completing the program:

Desired Learning Outcomes thus are as follows:

A. Understanding of the critical scientific principles and concepts of Plant Protection including the knowledge of plant, insect and weed pests and the theories of management to control them. The ability to apply
concepts to real-life situations and the ability to analyze and critically evaluate scientific information published in respect to Plant Protection.

B. Demonstrate ability to clearly express and discuss scientific concepts with in both a classroom and work environment using oral and written communication skills.

Outcomes (A) align with UI Outcomes (1) Learn and Integrate, (2) Communicate, (3) Clarify Purpose and Perspective, and (4) Practice Citizenship; Outcomes (B) align with UI Outcomes (1) Learn and Integrate, (2) Think and Create, and (3) Communicate.

2. Describe the assessment process that will be used to evaluate how well students are achieving the intended learning outcomes of the program component:

Direct Measure Process (per our current protocols and metrics):
A. Ability to apply disciplinary knowledge to broader scientific and societal issues, including the knowledge of plant pathogens and disease management, this will be assessed within specific exam questions that faculty agree will assess the principles and concepts of Plant Protection including the knowledge of plant, insect and weed pests and the theories of management to control them.

B. Demonstrated ability to apply academic knowledge to real-world problems and controversies using case studies in Senior Experience Capstone course (ENT/PLSC/SOIL 438); performance on parts of standardized exams including essay questions that assess ability to integrate and synthesize various concepts and their presentations will be evaluated for oral communication skills.

Indirect Measure Process (per our current protocols and metrics):
A. Successful completion of internships with various employers around the region; numbers of students participating in clubs/organizations and service learning, student evaluations of teaching; student grades in core courses, including performance on lecture exams, laboratory exams, class projects, and term papers.

B. Exit interviews with graduating seniors, including overall assessment of degree program, internships, student clubs/organizations, and opportunities for service learning activities.

3. How will you ensure that the assessment findings will be used to improve the program?

We anticipate that the Curriculum Committee for the Department of Entomology, Plant Pathology and Nematology will be charged with interpretation of annual Learning Outcome metrics for all EPPN instructional programs and that will recommend specific policy for consideration and implementation by the EPPN Administrator. An underpinning objective will be to contribute to UI Strategic Plan Goals for Undergraduate enrollment.

4. What direct and indirect measures will be used to assess student learning?

Direct Benchmarks (per our current protocols and metrics):
Majority of students in Senior Experience Capstone course display demonstrate ability to critically analyze and report on case studies; at least 80% of students pass standardized tests; at least 80% of employers are satisfied with performance of student interns; at least 75% of students actively participate in club/organization and/or service learning activities.

Indirect Benchmarks (per our current protocols and metrics):
At least 80% of employers and students report overall satisfaction with internship experience; student evaluations of course and instructor quality in courses required by major and emphasis areas are 3 or higher; students receive a grade of C or higher in all courses required by major and emphasis areas.

5. When will assessment activities occur and at what frequency?

Learning Outcomes Assessment will occur throughout the academic year. Metrics will be reported annually during September for the prior Academic Year.
Distance Education Availability

To comply with the requirements of the Idaho State Board of Education (SBOE) and the Northwest Commission on Colleges and Universities (NWCCU), the University of Idaho must declare whether 50% or more of the curricular requirements of a program may be completed via distance education. If the program component is to be offered via distance education, additional or different formwork may be required. Contact provost@uidaho.edu for assistance.

The U.S. Department of Education defines distance education as follows:

*Distance education means education that uses one or more of the technologies listed below to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor, either synchronously or asynchronously. The technologies may include—*

1. The internet;
2. One-way and two-way transmissions through open broadcast, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communications devices;
3. Audio conferencing; or
4. Video cassettes, DVDs, and CD-ROMs, if the cassettes, DVDs, or CD-ROMs are used in a course in conjunction with any of the technologies listed in paragraphs (1) through (3).

<table>
<thead>
<tr>
<th>Can 50% or more of the curricular requirements of this program component be completed via distance education?</th>
<th>Yes*</th>
<th>No</th>
<th>x</th>
</tr>
</thead>
<tbody>
<tr>
<td>*If Yes, can 100% of the curricular requirements of this program component be completed via distance education?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Geographical Area Availability

Identify the geographical area(s) this program component can be completed in:

<table>
<thead>
<tr>
<th>Location</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Moscow</td>
<td>X</td>
</tr>
<tr>
<td>Coeur d’Alene</td>
<td></td>
</tr>
<tr>
<td>Boise</td>
<td></td>
</tr>
<tr>
<td>Idaho Falls</td>
<td></td>
</tr>
<tr>
<td>Other**</td>
<td>Location(s):</td>
</tr>
</tbody>
</table>

*Note: Programs offered in locations other than Moscow may require additional formwork from the State Board of Education. Contact the Office of the Provost and Executive Vice President for additional information.

**Note: If Other is selected, identify the specific area(s) this program component will be offered.
# PROPOSAL TO CREATE UNDERGRADUATE AGRICULTURAL COMMODITY RISK MANAGEMENT CERTIFICATE

Two of the following:  
- AGEC 489 Understanding & Using Futures & Options Markets  
- AGEC 414 Financial Analysis of Agricultural Firms  
- AGEC 490 Commodity Price Analysis

One of the following:  
- FIN 465 Introduction to Market Trading  
- FIN 466 Market Trading Strategies  
- AGEC 489\(^1\) Understanding and Using Futures and Options Markets  
- AGEC 414\(^1\) Financial Analysis of Agricultural Firms  
- AGEC 490\(^1\) Commodity Price Analysis  
\(^1\)cannot be double counted

At least 3 credits from the following:  
- AGEC 468 Commodity Merchandising  
- AGEC 469 Commodity Trading  
- AGEC 489L Applied Commodity Market Analysis  
- FIN 467 Barker Capital Management Group  
- FIN 468 Market Trading Lab

Courses to total 12 credits for this certificate
PROGRAM COMPONENT (Group B) OR NON-SUBSTANTIVE MINOR REQUEST FORM (Short Form)

Instructions: Please use one form for each request/action. Clearly mark all changes using either (1) Track Change or (2) strikethroughs for deletions and underlines for additions. Yellow indicates a required field. Green are fields that are optional depending on the change you are requesting. Following the appropriate department and college approvals the department chair will e-mail the completed form to provost@uidaho.edu.

Deadline: This form must be submitted by October 1 for inclusion in the next available General Catalog and to be available for scheduling beginning with the next summer session.

When applicable, a Curriculum Change Form and Course Approval Forms must accompany the short form. Incomplete forms will be returned.

<table>
<thead>
<tr>
<th>Submission Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept Chair Name:</td>
</tr>
<tr>
<td>Department/Unit:</td>
</tr>
<tr>
<td>College:</td>
</tr>
<tr>
<td>Dept/Unit Curriculum Committee Approval Date:</td>
</tr>
<tr>
<td>Dept Chair Signature of Approval</td>
</tr>
<tr>
<td>College Curriculum Committee Approval Date:</td>
</tr>
<tr>
<td>Dean Signature of Approval</td>
</tr>
<tr>
<td>Primary Point of Contact:</td>
</tr>
<tr>
<td>Briefly describe the change you are requesting:</td>
</tr>
</tbody>
</table>

What is the financial impact of the requested change?

| Greater than $250,000 per FY: | X | Less than $250,000 per FY: |

**Note:** If financial impact is greater than $250,000, you must complete a Program Proposal form.

Describe the financial impact:

Rationale for Program Component Request or Name Change

Explain the change you are requesting, and provide a rationale for this request. Include an explanation of how the department will manage the added workload for a new program component; describe whether the program component curriculum and admissions requirements remain the same; describe the rationale for a name change or degree designation change, if applicable.

The Department of Agricultural Economics and Rural Sociology (AERS) created the Agricultural Commodity Risk Management Program in the spring of 2017 as a collaborative effort with the College of Business and Economics (CBE) through the Barker Trading Program. Since the inception of the program, AERS has developed new curriculum to accommodate growing interest in this field of study for CALS students. To acknowledge completion of a concentrated coursework in the study of agricultural risk management for both CALS and CBE students participating in the Barker Program, AERS is seeking approval for a certificate in Agricultural Commodity Risk Management. Workload for the new certificate will be facilitated with the recent addition of two new faculty members in AERS, along with an existing faculty member who is also Director of the AERS risk management program. AERS faculty will be developing and teaching the new curriculum integrated into the certificate, which will be complemented by several courses currently being offered through the CBE.
Name or Degree Change Only Requests

This section to be completed ONLY for changes to the name of: degree, major, minor, option, emphasis, certificate, teaching endorsement.

<table>
<thead>
<tr>
<th>Current Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Name:</td>
</tr>
<tr>
<td>Current Degree:</td>
</tr>
<tr>
<td>New Degree:</td>
</tr>
<tr>
<td>Other Details:</td>
</tr>
<tr>
<td>Effective Date:</td>
</tr>
</tbody>
</table>

Please indicate if any course or curriculum changes are occurring as a result of this name or degree change request: ☐ Yes  ☐ No

If there are accompanying curriculum or course changes, complete the next section and attach the curriculum and/or course forms.

* * * Note: A substantive change to a program degree, major, or program component may require a program proposal form.

Please indicate whether 25% or more of the program learning outcomes are changing: ☐ Yes  ☐ No
* * * Note: If you answered YES to this question, complete the table below:

<table>
<thead>
<tr>
<th>SLO#1</th>
<th>List Old Learning Outcomes</th>
<th>New Learning Outcome, if changed (If no change, write N/A and move to next outcome)</th>
<th>New Direct Measure (list student work product and explain how it will be evaluated)</th>
<th>Have you updated the assessment cycle to include this change? (yes/no)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLO#2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SLO#3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SLO#4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SLO#5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Program Component Request

Leave blank if not adding, discontinuing, or modifying a program component. Program components consist of option, emphasis, minor, academic certificate less than 30 credits, or teaching endorsement.

Clearly mark all changes to existing program components by using either (1) Track Change or (2) strikethroughs for deletions and underlines for additions. A curriculum change form and/or course approval forms associated with this request are required to be submitted with this short form.

<table>
<thead>
<tr>
<th>X</th>
<th>Create New</th>
<th>Discontinue</th>
<th>Implementation Date:</th>
<th>Fall Semester 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Graduate Level</td>
<td>Undergraduate Level</td>
<td>Law Level</td>
<td>Credit Requirement:</td>
</tr>
<tr>
<td>X</td>
<td>No</td>
<td>Yes</td>
<td>If yes, how many courses will be created:</td>
<td>2</td>
</tr>
</tbody>
</table>

If the request is for an option or emphasis, enter the associated major and degree:

<table>
<thead>
<tr>
<th>Major:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIP Code:</td>
</tr>
<tr>
<td>Degree:</td>
</tr>
</tbody>
</table>

Enter the name of the program component in the appropriate row:

<table>
<thead>
<tr>
<th>Option:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emphasis:</td>
</tr>
<tr>
<td>Minor:</td>
</tr>
<tr>
<td>Academic Certificate less than 30 credits:</td>
</tr>
<tr>
<td>Teaching Endorsement (Major/Minor):</td>
</tr>
</tbody>
</table>

Provide a summary/description of the program component using 50 words or less:

Completion of this certificate signifies student has attained a direct working knowledge in commodity price-risk management through trading real-world cash commodities and futures contracts, understanding the complexities of agricultural supply-chain management, applied market analytical methodologies and appropriate trading techniques for agricultural commodity futures and options.
### Learning Outcomes and Assessment Information

This section must be completed if program component request section is completed.

1. List the intended learning outcomes for the program component. Use learner centered statements that indicate what will students know, be able to do, and value or appreciate as a result of completing the program:

<table>
<thead>
<tr>
<th>Students completing the certificate curriculum will be able to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Analyze the life cycle of a commodity</td>
</tr>
<tr>
<td>▪ Develop and implement commodity hedging strategies for regional agricultural products.</td>
</tr>
<tr>
<td>▪ Understand the mechanics of trading futures, options and spreads</td>
</tr>
<tr>
<td>▪ Analyze supply and demand factors — locally, regionally and globally — to develop strategies</td>
</tr>
<tr>
<td>▪ Risk manage the agricultural supply chain from farm to fork</td>
</tr>
</tbody>
</table>

2. Describe the assessment process that will be used to evaluate how well students are achieving the intended learning outcomes of the program component:

   Intended learning outcomes of the program will be assessed through assignments collected from each course to assemble a body of work for program evaluation. In addition, indirect measures will be obtained to provide assessment through external means as a check on direct measures. The learning outcomes are assessed through a two-fold process of activity-based curriculum with final projects and assignments submitted by the students, all serving as a body of work to determine if in fact overall learning objectives of the program curriculum are being met.

3. How will you ensure that the assessment findings will be used to improve the program?

   The body of work encompassed by students completing the program will be evaluated on an annual basis. Curriculum content and instruction will be modified to address areas of the program that show a need for improvement or reinforcement of concepts.

4. What direct and indirect measures will be used to assess student learning?

   Direct measures will include homework assignments, trading outcomes from the point of rationale used to implement hedged and outright trading positions, and application of sound risk management practices will be utilized as a gauge of student learning from the program. For example, analysis of the life cycle for a commodity relative to supply and demand factors is an intended learning outcome of AGE 489L, built upon the definitions and mechanics of futures markets learned in AGE 489 and applied through trade simulators. The ability to develop and implement commodity hedging strategies is an intended learning outcome of AGE 489, assessed by student ability to establish actual hedged grain positions utilizing regional cash grain markets and exchange-traded futures. The ability to implement actual futures trading positions based upon market analysis and risk parameters is learned in AGE 469. Indirect measures will be derived from internship response from providers, exit interviews from students participating in the program, career placement and industry feedback from employers, along with continued input from advisory board representatives from the Barker Program in the College of Business & Economics and Department of Agricultural Economics and Rural Sociology in the College of Agricultural & Life Sciences.

5. When will assessment activities occur and at what frequency?

   Assessment of overall certificate program activities will be reviewed on an annual basis through both departmental and industry representation, but student feedback will be assessed both during and after each semester of coursework as an indicator of program effectiveness.

---

### Distance Education Availability

This section must be completed if program component request section is completed.

To comply with the requirements of the Idaho State Board of Education (SBOE) and the Northwest Commission on Colleges and Universities (NWCCU), the University of Idaho must declare whether 50% or more of the curricular requirements of a program may be completed via distance education. If the program component is to be offered via distance education, additional or different formwork may be required. Contact provost@uidaho.edu for assistance.

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4. Video cassettes, DVDs, and CD-ROMs, if the cassettes, DVDs, or CD-ROMs are used in a course in conjunction with any of the technologies listed in paragraphs (1) through (3).
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</thead>
<tbody>
<tr>
<td>*If Yes, can 100% of the curricular requirements of this program component be completed via distance education?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**Geographical Area Availability**

*This section must be completed if program component request section is completed*

Identify the geographical area(s) this program component can be completed in:

<table>
<thead>
<tr>
<th>Location</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Moscow</td>
<td>X</td>
</tr>
<tr>
<td>Coeur d'Alene</td>
<td></td>
</tr>
<tr>
<td>Boise*</td>
<td></td>
</tr>
<tr>
<td>Idaho Falls*</td>
<td></td>
</tr>
<tr>
<td>Other**</td>
<td>Location(s):</td>
</tr>
</tbody>
</table>

*Note: Programs offered in locations other than Moscow may require additional formwork from the State Board of Education. Contact the Office of the Provost and Executive Vice President for additional information.  
**Note: If Other is selected, identify the specific area(s) this program component will be offered.
AGRICULTURAL ECONOMICS AND RURAL SOCIOLOGY

1. Add the following course:

**AGEC 490 Commodity Price Analysis**
3 credits
Methods used to analyze factors affecting agricultural prices; analysis of agricultural prices and price movements with respect to time, space, and form; and examination of methods of price forecasting and techniques of time series analysis.
**Prereq:** STAT 251, AGEC 489 or FIN 466, AGEC 289

**Available via distance:** No
**Geographical Area:** Moscow
**Rationale:** To implement a course to accommodate student interest from both the College of Agricultural and Life Sciences and College of Business and Economics, provided as part of the requirements for the CBE Trading Certificate. The course provides a deeper understanding of underlying factors that help to determine commodity prices and the function of commodity price risk, developing tools to investigate them, as well as a first approximation to the relevant literature and frameworks.
PROPOSAL TO CREATE NEW EMPHASES IN THE MASTER OF ACCOUNTANCY:
1) TAXATION AND 2) AUDIT AND ASSURANCE

The Master of Accountancy degree requires 30 semester credits beyond the bachelor’s degree, and is designed to meet the 150-credit requirement for taking the CPA examination in Idaho. Completion of this degree qualifies students to enter the public accounting profession in auditing, tax, or other positions ultimately requiring a CPA license.

Students seeking the M.Acct. degree will develop a degree plan in consultation with their advisors, complete at least 30 credits of course work, and successfully complete a comprehensive paper and portfolio.

If a student has earned a BS in Accounting (or equivalent), the required courses include:

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT 586</td>
<td>Contemporary Management Accounting Issues</td>
<td>3</td>
</tr>
<tr>
<td>ACCT 590</td>
<td>Advanced Auditing Seminar</td>
<td>3</td>
</tr>
<tr>
<td>ACCT 592</td>
<td>Financial Accounting and Reporting Seminar</td>
<td>3</td>
</tr>
</tbody>
</table>

Select two courses from the following: 6

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT 515</td>
<td>Advanced Financial Accounting &amp; Reporting</td>
<td></td>
</tr>
<tr>
<td>ACCT 521</td>
<td>Accounting Data Analytics</td>
<td></td>
</tr>
<tr>
<td>ACCT 530</td>
<td>Accounting for Public Sector Entities</td>
<td></td>
</tr>
<tr>
<td>ACCT 550</td>
<td>Fraud Examination</td>
<td></td>
</tr>
<tr>
<td>ACCT 561</td>
<td>Comparative Accounting Theory</td>
<td></td>
</tr>
<tr>
<td>ACCT 584</td>
<td>Federal Taxation of Entities</td>
<td></td>
</tr>
<tr>
<td>ACCT 585</td>
<td>Estate and Elder Planning</td>
<td></td>
</tr>
<tr>
<td>ACCT 598</td>
<td>Internship (Max 3 credits)</td>
<td></td>
</tr>
<tr>
<td>ACCT 599</td>
<td>Non-thesis Master’s Research (Max 6 credits)</td>
<td></td>
</tr>
</tbody>
</table>

Additional 15 credits from approved courses 15

Total hours 30

Taxation Emphasis

General Master of Accountancy requirements apply. A total of 30 credits are required for this degree.

A Taxation Emphasis is available by completing 12 credits from the following or electives approved by a major professor: 12

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT 584</td>
<td>Federal Taxation of Entities</td>
<td></td>
</tr>
<tr>
<td>ACCT 585</td>
<td>Estate and Elder Planning</td>
<td></td>
</tr>
<tr>
<td>ACCT 598</td>
<td>Internship (Max 3 credits)</td>
<td></td>
</tr>
<tr>
<td>BLAW 425</td>
<td>Business Law of Entities</td>
<td></td>
</tr>
</tbody>
</table>

Additional 9 credits are chosen from approved courses 9

Audit and Assurance Emphasis

General Master of Accountancy requirements apply. A total of 30 credits are required for this degree.

An Audit and Assurance Emphasis is available by completing 12 credits from the following or electives approved by a major professor: 12

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT 521</td>
<td>Accounting Data Analytics</td>
<td></td>
</tr>
</tbody>
</table>
Additional 9 credits are chosen from approved courses

In addition students must have taken at least one US tax class, and at least one Business Law class at the upper-division undergraduate level or at the graduate level. An additional 15 credits are chosen from approved options. Those electing the thesis option include 6 credits of ACCT 500 in the additional 15 credits (must still complete comprehensive paper and portfolio).

If a student has not earned a BS in Business (or equivalent), in addition to the above mentioned courses, the student must take or have taken at least 24 credits of business, economics, statistics, and business law courses at the undergraduate level or at the graduate level. These courses must include at least two business disciplines (e.g. management, marketing, and finance).

Rationale: ACCT 561 Comparative Accounting Theory and ACCT 521 Accounting Data Analytics are current and relevant courses that are appropriate to be taken as accounting electives in the MACCT program.

ACCT 561 and ACCT 521 have been offered for several years, therefore no additional resources are needed.

Since the courses are electives the learning objectives will not be assessed for all MACCT students at the program level. Note that the course learning objectives are assessed at the course level by the accounting faculty member teaching the course.

Taxation Emphasis; and Audit and Assurance Emphasis:
The Accounting Department faculty with the support of the Accounting Advisory Board is requesting two emphases in the Master of Accountancy degree: Taxation; Audit and Assurance. The emphasis in Taxation will provide in-depth knowledge of taxation and estate planning issues and related accounting issues. The emphasis in Audit and Assurance will provide accounting graduates in gaining in-depth knowledge of audit and fraud examination issues and procedures and related accounting issues. The Program Component (Group B) Request Short Form has been submitted.

Two additional taxation courses and one audit/assurance related courses will need to be offered at $6,000.00 per course plus fringe benefits of $1,554 per year, for a total of $22,662.00. Fees received from summer school courses will be used to pay for the additional instruction costs. It is expected that additional revenue will be earned from undergraduate and MACCT students as well as law students who take the additional courses during the summer session.

The advising function for the proposed emphases will be performed by the major professors and will not require additional resources.

Assessment of emphases:
The Accounting faculty will assess the professional tax and audit knowledge in the specific courses in the respective emphasis using direct measures of exams, papers, and/or projects. They will analyze the results and report their findings and recommendations to the Accounting Department Head at the end of each semester. Note that the other learning goals (general accounting knowledge; critical thinking and ethical critical thinking and research skills; written and oral communication skills; clarify purpose and perspective; and teamwork and leadership) will remain the same for all of the MACCT students at the overall MACCT program level.
Instructions: Please use one form for each request/action. Clearly mark all changes using either (1) Track Change or (2) strikethroughs for deletions and underlines for additions. Following the approval of the appropriate college curriculum committee, the department chair will e-mail the completed form to gracie.miller@uidaho.edu.

Deadline: This form must be submitted by October 1 for inclusion in the next available General Catalog and to be available for scheduling beginning with the next summer session.

When applicable, a Curriculum Change Form and Course Approval Forms must accompany the short form.

Submission Information
This section must be completed

<table>
<thead>
<tr>
<th>Dept Chair Name:</th>
<th>Marla A. Kraut</th>
<th>Email:</th>
<th><a href="mailto:marlam@uidaho.edu">marlam@uidaho.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>College:</td>
<td>College of Business and Economics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department/Unit:</td>
<td>Department of Accounting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept/Unit Approval Date:</td>
<td>May 2, 2018</td>
<td>Vote Record:</td>
<td>6 For, 0 Against, 1 Abstention</td>
</tr>
<tr>
<td>College Approval Date:</td>
<td>Sep 28, 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Point of Contact:</td>
<td>Marla A. Kraut</td>
<td>Email:</td>
<td><a href="mailto:marlam@uidaho.edu">marlam@uidaho.edu</a></td>
</tr>
</tbody>
</table>

Briefly describe the change you are requesting:
Offer two emphases in the Master of Accountancy degree: Taxation; Audit and Fraud Examination.

What is the financial impact of the requested change?

<table>
<thead>
<tr>
<th>Greater than $250,000 per FY:</th>
<th>X</th>
<th>Less than $250,000 per FY:</th>
</tr>
</thead>
</table>

**Note: If financial impact is greater than $250,000, you must complete a Program Proposal form.

Describe the financial impact: Two additional taxation courses and one audit/fraud examination related courses will need to be offered at $6,000.00 per course plus fringe benefits of $1,554 per year, for a total of $22,662.00. Fees received from summer school courses will be used to pay for the additional instruction costs. It is expected that additional revenue will be earned from undergraduate and MACCT students as well as law students who take the additional courses during the summer session.

The advising function for the proposed emphases will be performed by the major professors and will not require additional resources.

Rationale for Program Component Request or Name Change
This section must be completed

The Accounting Department faculty with the support of the Accounting Advisory Board is requesting two emphases in the Master of Accountancy degree: Taxation; Audit and Fraud Examination. The emphasis in Taxation will provide in-depth knowledge of taxation and estate planning issues and related accounting issues. The emphasis in Audit and Fraud Examination will provide accounting graduates in gaining in-depth knowledge of audit and fraud examination issues and procedures and related accounting issues.

Offering the MACCT Taxation Emphasis should increase enrollments (UI Strategic Plan Goal #3 Transform Objective A). Note that most national CPA firms pay up to $10,000 additional compensation for graduates with a taxation emphasis in a master's program. Several BYU-ID accounting students have told the Accounting Department Head that they chose Boise State University because it has a tax emphasis, but would have chosen to attend UI if we offered the emphasis. The following peer institutions also offer a taxation emphasis or option in their graduate accounting program: Gonzaga, University of Washington, and University of Oregon. Idaho State University offers a Master in Taxation. Some of the UI Law School faculty members think the MACCT Taxation Emphasis would be an opportunity for the Concurrent JD/MACCT students.

The admission requirements and the program component curriculum for the Master of Accountancy program will remain the same. The 12 credits of each emphasis will be part of the electives in the general MACCT curriculum. The total 30 credits requirement for the MACCT degree will remain the same.

The proposed emphases will include existing courses from the existing MACCT program and two additional courses in taxation and one in audit/fraud examination area. As stated previously, the costs of instruction for the courses will be covered by summer school fees.
### Name or Degree Change Only Requests
Leave blank if not making a name and/or degree change only request

This section to be completed ONLY for changes to the name of: degree, major, minor, option, emphasis, certificate, teaching endorsement.

<table>
<thead>
<tr>
<th>Current Name:</th>
<th>New Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Degree:</td>
<td>New Degree:</td>
</tr>
<tr>
<td>Other Details:</td>
<td></td>
</tr>
<tr>
<td>Effective Date:</td>
<td></td>
</tr>
</tbody>
</table>

Please indicate if any course or curriculum changes are occurring as a result of this name or degree change request: ☐ Yes ☐ No

If there are accompanying curriculum or course changes, complete the next section and attach the curriculum and/or course forms.

**Note:** A substantive change to a program degree, major, or program component may require a program proposal form.

Please indicate whether 25% or more of the program learning outcomes are changing: ☐ Yes ☐ No

**Note:** If you answered YES to this question, complete the table below:

<table>
<thead>
<tr>
<th>SLO#1</th>
<th>New Learning Outcome, if changed (if no change, write N/A and move to next outcome)</th>
<th>New Direct Measure (list student work product and explain how it will be evaluated)</th>
<th>Have you updated the assessment cycle to include this change? yes/no</th>
</tr>
</thead>
<tbody>
<tr>
<td>MACCT students will acquire advanced accounting knowledge to prepare them for the accounting profession or further graduate work.</td>
<td>N/A</td>
<td>Research papers in each emphasis course. The knowledge will be evaluated by the faculty member.</td>
<td>no</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SLO#1A – For Taxation Emphasis</th>
<th>MACCT students will acquire advanced knowledge of taxation issues, tax law, and regulations to prepare them to be a successful tax professional.</th>
<th>Final exams in each emphasis course. The knowledge will be evaluated by the faculty member.</th>
<th>no</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SLO#1B – For Audit and Fraud Examination Emphasis</th>
<th>MACCT students will acquire advanced knowledge of audit issues and principles to prepare them to be a successful audit professional.</th>
<th>Final exams in each emphasis course. The knowledge will be evaluated by the faculty member.</th>
<th>no</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SLO#2 Critical Thinking, Ethical Problem Solving, and Research Skills</th>
<th>N/A</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SLO#3 Professional Oral and Written Communication Skills</th>
<th>N/A</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SLO#4 Relationship development and appreciation of global perspectives</th>
<th>N/A</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SLO#5 Teamwork and leadership skills</th>
<th>N/A</th>
<th></th>
</tr>
</thead>
</table>

### Program Component Request
Leave blank if not adding, discontinuing, or modifying a program component. Program components consist of option, emphasis, minor, academic certificate less than 30 credits, or teaching endorsement

Clearly mark all changes to existing program components by using either (1) Track Change or (2) strikethroughs for deletions and underlines for additions. A curriculum change form and/or course approval forms associated with this request are required to be submitted with this short form.

<p>| X Create New | Discontinue | Implementation Date: Fall 2019 |</p>
<table>
<thead>
<tr>
<th>Graduate Level</th>
<th>Undergraduate Level</th>
<th>Law Level</th>
<th>Credit Requirement:</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Are new courses being created: (circle your response)  
No  Yes  If yes, how many courses will be created: 2

If the request is for an option or emphasis, enter the associated major and degree:

<table>
<thead>
<tr>
<th>Major: Master of Accountancy</th>
<th>CIP Code: 520301</th>
<th>Degree: Accountancy</th>
</tr>
</thead>
</table>

Enter the name of the program component in the appropriate row:

Option:  
Emphasis: Taxation; Audit and Fraud Examination

Minor:

Academic Certificate less than 30 credits:

Teaching Endorsement (Major/Minor):

Provide a summary/description of the program component using 50 words or less:

The Master of Accountancy degree requires 30 credits beyond the bachelor’s degree. The Taxation Emphasis is available by completing four courses in taxation, business law, or internship. The Audit and Fraud Examination Emphasis is available by completing four courses in audit, fraud examination, data analytics, or internship.

**Learning Outcomes and Assessment Information**

This section must be completed if program component request section is completed

1. List the intended learning outcomes for the program component. Use learner centered statements that indicate what will students know, be able to do, and value or appreciate as a result of completing the program:

**Learning Goal #1 - Professional Accounting Knowledge:**

For the Taxation Emphasis: MACCT students will acquire advanced knowledge of taxation issues, tax law, and regulations to prepare them to be a successful tax professional.

For the Audit and Fraud Examination Emphasis: MACCT students will acquire advanced knowledge of audit issues and principles to prepare them to be a successful audit professional.

Note that the other learning goals (general accounting knowledge; critical thinking and ethical critical thinking and research skills; written and oral communication skills; clarify purpose and perspective; and teamwork and leadership) will remain the same for all of the MACCT students at the overall MACCT program level.

2. Describe the assessment process that will be used to evaluate how well students are achieving the intended learning outcomes of the program component:

The Accounting faculty will assess the professional tax and audit knowledge in the specific courses in the respective emphasis using direct measures of exams, papers, and/or projects. They will analyze the results and report their findings and recommendations to the Accounting Department Head at the end of each semester.

3. How will you ensure that the assessment findings will be used to improve the program?

The results of the assessment findings will be reported to the Accounting faculty and Accounting Advisory Board annually by the Accounting Department Head. The Accounting faculty will input from the Accounting Advisory Board will discuss the results at the fall meeting to develop recommendations to individual courses and the program as a whole to improve student learning.

4. What direct and indirect measures will be used to assess student learning?
Direct measures will include course embedded exams, papers, and projects and MACCT Portfolio Paper at the end of the student’s program.

Indirect measures will include graduating student survey, Accounting Advisory Board discussions, focus groups, and alumni survey.

5. When will assessment activities occur and at what frequency?

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct measures</td>
<td>Occur continuously within the semester.</td>
</tr>
<tr>
<td>Indirect measures</td>
<td>Occur annually (except for the alumni survey which occurs every five years).</td>
</tr>
</tbody>
</table>

**Distance Education Availability**

This section must be completed if program component request section is completed

To comply with the requirements of the Idaho State Board of Education (SBOE) and the Northwest Commission on Colleges and Universities (NWCCU), the University of Idaho must declare whether 50% or more of the curricular requirements of a program may be completed via distance education. **If the program component is to be offered via distance education, additional or different formwork may be required.** Contact provost@uidaho.edu for assistance.

The U.S. Department of Education defines distance education as follows:

Distance education means education that uses one or more of the technologies listed below to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor, either synchronously or asynchronously. The technologies may include:

1. The internet;
2. One-way and two-way transmissions through open broadcast, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communications devices;
3. Audio conferencing; or
4. Video cassettes, DVDs, and CD-ROMs, if the cassettes, DVDs, or CD-ROMs are used in a course in conjunction with any of the technologies listed in paragraphs (1) through (3).

<table>
<thead>
<tr>
<th>Can 50% or more of the curricular requirements of this program component be completed via distance education?</th>
<th>Yes*</th>
<th>No</th>
<th>X</th>
</tr>
</thead>
<tbody>
<tr>
<td>*If Yes, can 100% of the curricular requirements of this program component be completed via distance education?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**Geographical Area Availability**

This section must be completed if program component request section is completed

Identify the geographical area(s) this program component can be completed in:

<table>
<thead>
<tr>
<th>Geographical Area</th>
<th>X</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moscow</td>
<td>X</td>
</tr>
<tr>
<td>Coeur d’Alene</td>
<td></td>
</tr>
<tr>
<td>Boise*</td>
<td></td>
</tr>
<tr>
<td>Idaho Falls*</td>
<td></td>
</tr>
<tr>
<td>Other**</td>
<td>Location(s):</td>
</tr>
</tbody>
</table>

*Note: Programs offered in locations other than Moscow may require additional formwork from the State Board of Education. Contact the Office of the Provost and Executive Vice President for additional information.

**Note: If Other is selected, identify the specific area(s) this program component will be offered.
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

Chapter & Title: FSH 1640.91 – University Curriculum Committee

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): Jerold Long 02/01/2019

(Please see FSH 1460 C)

Telephone & Email

208-885-4977 law-dean@uidaho.edu

Policy Sponsor: (If different than originator.)

Reviewed by General Counsel ____Yes ____No Name & Date: ________________________

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.

Unlike the other academic Colleges, the College of Law does not have a position on the University Curriculum Committee, despite the fact that University policy now requires all College of Law curricular changes be reviewed and approved by the UCC. This revision to the FSH would match the structure and membership of the UCC with the actual function of the UCC.

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

None.

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

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.

Policy Coordinator Appr. & Date: ________________________

AMPP.
F&A Appr.: ________________________

[Office Use Only]

FSH

Appr. ________________________

FC ________________________

GFM ________________________

Pres./Prov. ________________________

[Office Use Only]

Track #: ________________________

Date Rec.: ________________________

Posted: t-sheet ________________________

h/c ________________________

web ________________________

Register: ________________________

(Office Use Only)
Proposed Handbook Changes
Effective Summer 2019

UNIVERSITY CURRICULUM COMMITTEE

A. FUNCTION. [See 1540 B and C and also 4110 and 4120.] [ed. 7-98]

A-1. To act on catalog changes involving the curriculum, including changes in the general requirements and academic procedures, and to coordinate curricular matters among UI's major academic divisions.

A-2. To recommend policies and procedures concerning the matriculation, advising, and registration of students.

A-3. This committee traditionally meets on Mondays at 3:30 p.m. [add. 7-08]

B. STRUCTURE. One faculty member from each college except Law and Graduate Studies, of whom at least one must be a member of the graduate faculty and at least one of whom must have experience in an interdisciplinary area; one faculty member at large, one faculty member from the library, two upper-division undergraduate students; one graduate student; and the following without vote: vice provost of academic affairs, registrar, secretary of the faculty (or their designees), and the director of general education as a non-voting member of the University Curriculum Committee. To assure a quorum alternates for the faculty positions are appointed by the chair of the University Curriculum Committee from a list of those who have previously served on the committee from that college. If there should be no such alternates available from a particular college, the chair of that college's curriculum committee is the designated alternate. [rev. 7-98, 7-06, 7-08, 1-09, ed. 8-12]
POLICY COVER SHEET

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

Policy Sponsor:

Originator(s):

Policy Coordinator

I. Policy/Procedure Statement:

II. Fiscal Impact:

III. Related Policies/Procedures:

IV. Effective Date:

If not a minor amendment forward to: __________

[Office Use Only]

Track # ____________

Date Rec.: __________

Posted: ______

Register: __________

[Office Use Only]

[Office Use Only]
PERFORMANCE EVALUATION OF STAFF EMPLOYEES

PREAMBLE: This section contains those policies and their attendant procedures for those periodic performance reviews of classified personnel and exempt personnel. An original part of the 1979 Handbook, this section was revised in December of 1992, inter alia to reflect changes in step increases. Unless otherwise noted, the text is that of July 1996. For further information, contact Human Resource Development (208-885-9164). [ed. 7-97, 12-04, 6-09, rev. 7-98]

CONTENTS:
A. General Principles
B. Instructions for Completing the Performance Evaluation Form

A. GENERAL PRINCIPLES.

A-1. Performance evaluation is a responsibility of every manager-supervisor and should be performed in a timely manner for every employee. The purposes of performance evaluation include but are not limited to: facilitating employee productivity and professional growth, encouraging communication between employees and supervisors, documenting performance strengths and weaknesses, supporting meritorious salary increases or identifying the basis for demotion, disciplinary action or dismissal and motivating improvement in performance. To assist supervisors, Human Resource Development staff provide training in performance-appraisal techniques through workshops as well as through individual assistance. [ed. 12-04]

A-2. A formal evaluation of performance should be performed at least once a year, generally during January. Classified employees who are new to a classification will be evaluated after three months of service in the probationary period and again at the end of the probationary period but no later than six (6) months in the new position. [rev. 7-02, rev. 12-04]

a. Performance evaluations may also be conducted at other times at the discretion of the supervisor or department-unit administrator to further assist employees in improving performance or to formally advise them of performance or disciplinary problems. [ed. 7-02]

b. Supervisors and/or department/unit administrators (depending on procedures of the department) are responsible for evaluating performance in a responsible and timely manner. [rev. 7-98, ed. 7-02]

A-3. The performance evaluation form is a guide for evaluating the performance of all exempt staff and classified staff. Forms for each employee may be downloaded from the Human Resources website (www.uidaho.edu/humanresources.aspx). Human Resources notifies department administrators when annual or probationary evaluations are due. [rev. 7-02, ed. 12-04, 6-09]

A-4. The employee’s job description provides an objective standard by which performance is evaluated. Job descriptions for classified positions and some exempt staff positions are on file in Human Resources. Factors that also are considered include, but are not limited to, ability to work with other employees, record of attendance, and tardiness. [ed. 12-04, 6-09]

A-5. Evaluation of performance should be conducted by an employee’s immediate supervisor or department-unit administrator (depending on the procedures of the department). The evaluation should include a discussion between the supervisor and the employee regarding: (a) what is expected of the employee, including a review of standards of performance in the job description as well as goals and objectives established at the
prior evaluation; (b) the supervisor’s evaluation of performance for the current period; and (c) developmental activities or performance goals included in the review which will improve performance during the upcoming period. The employee is expected to participate in the discussion. [ed. 7-02]

A-6. Following the supervisor’s completion of the written evaluation discussion of performance between the supervisor and the employee, the employee has the opportunity to indicate in writing whether they or she concurs with the evaluation and to enter his or her written comments regarding the evaluation in the “Employee Comments” section of the performance evaluation form.

A-7. The written evaluation serves as the official record of performance; hence, it should be as complete as possible, signed and dated, and sent to Human Resources no later than the last working day in February. One copy of the evaluation is given to the employee, and one copy retained in the department/unit and should be referred to when subsequent evaluations are conducted. The official series of evaluations in HR becomes a record that supports decisions such as promotion or dismissal. [rev. 7-02, rev. 12-04]

A-8. A probationary classified employee who receives an overall unsatisfactory performance evaluation shall not be certified as having completed probationary status. In most instances, an unsatisfactory performance evaluation should be accompanied by a recommendation for demotion or termination of employment. In rare cases, the probationary period may be extended for up to an additional 90 days, with written performance reviews required at 30 and 60 days, and the final written evaluation completed no later than 90 days. (See APM 50.21) [rev. 7-02, ed. 12-04]

A-9. An employee who had previously been certified as having satisfactorily completed entrance probation may also be placed in probationary status following an evaluation which indicates that overall performance is less than satisfactory. A previously-certified employee who receives an overall rating of “needs improvement” or “unsatisfactory” must be placed on a performance development plan (PDP) to document the necessary improvement or the lack thereof, reevaluated, with written performance reviews required at 30 and 60 days, and the final written evaluation completed by 90 days with the employee’s progress or lack of it recorded. If the necessary improvement is not achieved through use of the PDP in the event that an overall rating of satisfactory is not achieved, other steps must be taken; these may include, but are not limited to, probation, demotion, suspension, or termination of employment. (See APM 50.21) [ed. 12-04]

A-10. Performance levels in each criterion evaluated are described as follows:

a. Outstanding is extraordinary performance well beyond that required for the position. [rev. 7-02]

b. Exceeds Requirements represents performance which is better than that expected of a fully competent employee. [rev. 7-02]

c. Meets Requirements is the performance expected of a fully competent employee and is defined as falling within a broad band of accomplishments ranging between “needs improvement” and “highly competent.” [rev. 7-02]

d. Needs Improvement denotes performance that is less than that expected of a fully competent employee. It means improvement is necessary. A rating of this type should be thoroughly discussed with the employee, and the employee placed on 90-day probation.

e. Unsatisfactory performance is inferior to the standards for the position. It should be used when an employee clearly fails to perform one or more duties critical to the job and the overall impact of the employee’s performance is such that termination of employment is considered and may be implemented. At the minimum, the rating will be thoroughly discussed with the employee, and the employee placed on 90-day probation.
B. INSTRUCTIONS FOR COMPLETING THE PERFORMANCE EVALUATION FORM.

B-1. Refer to the employee’s job description and agreed upon performance goals or Performance Development Plan (PDP) as the appropriate frame of reference for evaluation. Please attach a copy of the job description and goals (or PDP) to the completed evaluation form. [rev. 7-02, ed. 12-04]

B-2. Prepare a draft evaluation in preparation for discussion with the employee. The supervisor may wish to provide the employee with a blank evaluation form and ask him or her to prepare a self-assessment in preparation for the discussion that may be voluntarily given to the supervisor. [ed. 7-02]

B-3. Complete the evaluation form, providing examples and written comments as appropriate. The form is designed for multiple employment settings. If a particular evaluation criterion is not applicable, please check “NA,” provide a brief explanation, and continue to the next criterion.

B-4. Complete the rating for each of the relevant categories. Often an employee will have a range of ratings throughout the categories indicating individual strengths and weaknesses.

B-5. Schedule and conduct a performance review with the employee to discuss the evaluation. Encourage employee participation in this discussion. [rev. 7-02]

B-6. Offer the employee the opportunity to add written comments in the “Employee Comments” section.

B-7. The performance evaluation form is to be signed by the supervisor who completes it, and by the employee who receives it. If the employee refuses to sign the evaluation, the supervisor should note this fact on the evaluation; if so noted, refusal by the employee to sign the evaluation does not mean the evaluation is incomplete. In addition, each evaluation form is to be reviewed and signed by the department administrator with budget authority. Subsequent review by senior administrators is an option that may be exercised by those administrators. [ed. 7-02]

B-8. Please distribute final signed copies of the completed evaluation form as follows: original to the employee’s file in Human Resources; a copy to the dean’s or director’s office; a copy to the evaluator’s department file; and a copy to the employee. [rev. 7-02, ed. 12-04]

B-9. In the event the performance review leads to a recommendation of probation, demotion or termination of employment, see 3360 and 3930. The supervisor is expected to consult with the director of employment services in these cases. Should demotion, suspension or termination of employment be recommended, the evaluation must first be reviewed by a senior administrator at the level of dean or director, or above, as well as the director of employment services before the form is delivered to the employee. [ed. 7-02, 12-04]

(Staff Performance Evaluation Forms are on Human Resources website.)
Documenting and Addressing Unsatisfactory Performance of Classified Staff

A. General. Any UI classified employee who receives an overall rating of unsatisfactory or needs improvement as a result of performance evaluation must be placed on a performance development plan to document the necessary improvement or the lack thereof-related probationary status that lasts for ninety (90) days. A classified employee in entrance-probationary status who receives an overall performance evaluation of less than satisfactory may be extended in entrance-probationary status for up to an additional 90 days, during which time he or she is ineligible to be certified and is not eligible for a salary increase [FSH 3340] based on performance. A previously certified employee may also be placed in performance-related probationary status following an evaluation that indicates an overall performance of less than satisfactory, or following a violation of university policy. During these 90 days the probationary employee's performance is evaluated every thirty (30) days [FSH 3340].

B. Process. After completing a performance evaluation and/or otherwise documenting less-than-satisfactory performance, the supervisor notifies Human Resources and also meets with the employee and notifies him or her that he or she is being placed on probation. The notice informs the employee about the specific performance concerns, actions that need to be taken to improve performance satisfactorily, the time during which improvement is expected, and the consequences for failure to make improvements. The usual duration of performance probation is 90 days, and performance is evaluated at 30-day intervals. If probation is successfully completed, the employee is certified. If probation is not successfully completed, employment may be terminated or the employee may be demoted to a position in which he or she is certified at the discretion of the UI. [See FSH 3360]. The role of HR is to provide guidance to the supervisor regarding the procedural steps to be followed and provide information to the employee about UI procedures and expectations.

C. Procedure. The supervisor completes an initial employee performance evaluation by comparing the employee's performance to the job description responsibilities [See 50.08]. The performance evaluation may be a scheduled evaluation (such as an annual evaluation, or a routine evaluation during entrance probation), or it may occur following observation of a particular situation or activity.

C-1. Required Documentation. After completing an evaluation that documents performance as less than satisfactory, and prior to any further action, the supervisor forwards a confidential copy of the evaluation to Human Resources and to the dean or director. A letter informing the employee that he or she is being placed on probation will be developed by the supervisor in collaboration with Human Resources and the dean or director, or designee. The letter will:

i) Identify specific problems and corrective actions needed. The probationary letter should address specific problems that have been documented and the corrective actions that need to be accomplished during the probationary period.

ii) Identify the dates of subsequent 30-60-90 day reviews. These dates are to inform the employee and HR when the reviews are to be completed and submitted. If requested, HR will work with the supervisor to ensure evaluations are completed on schedule.

iii) Identify specific consequences. The probationary letter should incorporate the sentence: "should your performance not improve during this 90-day probationary period, further disciplinary action may be taken, up to and including possible termination of employment".

iv) Offer assistance to the employee. The letter can also reference employee assistance services available through the Employee Assistance Program (EAP), services which are confidential and free to the employee, and/or training opportunities which may be available and which may help the employee improve performance.

v) Develop a performance development plan (PDP). A performance development plan should be developed by the supervisor to clearly articulate the expectations for success in the position. A sample form and guidance in developing this performance tool is available from Human Resources.
C-2. **Schedule Employee Conference.** The supervisor schedules a conference with the employee to deliver the letter and answer any questions. The supervisor should make a note to the file regarding the date and time the letter was discussed, and the substance of the conversation with the employee.

C-3. **Follow Through with Timely Evaluations.** The supervisor is responsible to count the days, and specifically to ensure the 3rd review does not go beyond the 90 calendar days (89 days is permissible, 91 days is not).

C-4. **Consult with HR.** The supervisor should consult with the Director of Employment Services, or designee, and the dean or director of the employee's college or administrative unit (or designee) prior to completing the 90-day evaluation if demotion or termination is recommended.

i) If performance has improved, the employee will become certified in the position.

ii) If performance has not improved and it appears that demotion, suspension termination or other disciplinary action will be recommended, the Director of Employment Services will advise on the procedures to be followed. These procedures are legally required, and involve providing the employee with notice of contemplated action and an opportunity to respond before the final decision on the action is made or the action is initiated. [See FSH 3360 and 3930]

D. **Information.** Questions or problems regarding the progressive probationary process can be addressed to the Director of Employment Services in Human Resource Development (208) 885-3616.