

**2023 – 2024 Faculty Senate – Pending Approval**  
Meeting # 18  
Tuesday, January 23, 2024, 3:30 pm – 5:00 pm  
Zoom only

**Present:** Barannyk, Blevins, Chapman, Gauthier (Chair), Haltinner (Vice Chair), Justwan, Kenyon, Kirchmeier, Torrey Lawrence (w/o vote), Long, Maas, McKenna, Mittelstaedt, Murphy, Ramirez, Raney, Roberson, Rinker, Sammarruca (w/o vote), Schiele, Shook, Schwarzlaender, Tibbals.

**Absent:** Kenyon (excused), Hobbs, Reynolds

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

**Approval of Minutes (vote):**

The minutes of the 2023-24 Meeting #17, January 16, 2024, were approved as distributed.

**Announcements and Communications, Part 1:**

- **Admissions Standards** - Use of Standardized Tests for Admission Decisions – Dean Kahler, Vice Provost, Strategic Enrollment Management.

After reviewing AY 2022-23 admission standards, Vice Provost Kahler presented retention rates by high school (HS) GPA. **The data are attached to these minutes.** From Fall 2015 through Fall 2022, the retention rate with HS GPA of 3 and above has been around 80%, with a slight downward trend (81% in Fall 2015 vs. 77% in Fall 2022). The lack of SAT/ACT scores doesn't appear to change in a significant way the trends that we saw before waiving those scores.

Discussion:

In response to a question, Vice Provost Kahler noted that the HS GPA has been found to be a good predictor of success by other peer universities as well.

A senator cited the New York Times article "The Misguided War on the SAT" (nytimes.com) as an interesting take on the subject.

As for the slight decline in the retention rate of our best students (GPA 3 and up), the reasons can be diverse – sometimes they are non-academic, financial or family related. Additional analysis needs to be done on those trends to get better insight.

A senator is concerned that our current trend of lowering the standards and reducing barriers to entry to move students through may be seen unfavorably from the outside. Vice Provost Kahler responded that many campuses are having similar conversations. Next Monday, there is a meeting (Jean-Marc will be there) with the State Board (SB) staff to discuss our direct admit Idaho program. WSU has already dropped SAT scores from their admission standards. Provost Lawrence added that the SB is strongly committed to access and to educate more Idaho students, as demonstrated by the \$75M invested in the "Launch" initiative.

Provost Lawrence summarized the question before Faculty Senate: If we take no action, the current emergency action will expire and admission standards for Fall 2025 will revert to their pre-COVID status. If the Faculty Senate wants to act, the main question is whether dropping SAT scores caused large differences in retention and completion rates. The data suggests that it didn't. Vice Provost Kahler agrees.

Addressing a question about the current minimum GPA (which is 2.6, same as originally), the Provost noted that, with the current standards, a student with a GPA of 2.6 is directly admitted, whereas, in the former system, a student with a GPA of 2.7 would have not been directly

admitted if they had a low SAT score. So, the main question is: Are those students succeeding or do we need to be more careful with the group at the bottom?

**Master Developer P3 Update** – The project manager is Toni Broyles, Special Assistant to AVP, Cami McClure, Assistant Vice President, Auxiliary Services.

From campus-wide surveys, the issues that come up most frequently are pay, housing and childcare. With regard to housing, they are at the stage of research and analysis to provide recommendations. They are looking at housing for undergraduate (UG) students, graduate students (GS), married students with children (parenting housing), employees, and sometime in the future, retirees. They did an initial survey last year and one is on-going this year, for UG, GS, faculty and staff. The largest response rate is from employees. They are now pushing for a higher response from undergrad and graduate students. Toni asked to let students know about this feedback opportunity open to the entire campus.

Toni displayed a map showing the location of university housing. The “UG corridor” from Wallace Complex over to the LLCs is where UG, and some GS, predominantly live. Apartment living is on the so-called “South Hill,” the older part built in the 1960s and the newer in the 1990s. Those buildings are old, parking is limited, and so is access to emergency services. Nothing has been decided, as they are at the stage of preliminary design of some reconfiguration. The average age of our buildings is 53 years. As a future R1 university, and to be among the 25 top public residential universities (a priority for President Green), we need suitable on-campus housing. The plan is to keep UG housing where it is, and keep the amenities, such as food services, in the UG corridor. Also, some separation between graduate housing and parenting housing is appropriate. Future plans include a dedicated building for graduate and professional students. The university has recently procured the area where the Wells Fargo ATM used to be and some old railroad land nearby.

Units and departments work hard to bring the best faculty to campus, but when these new faculty come, they may not find suitable housing. It’s important to let them know that new faculty have at least one place to land when they first arrive. As part of their recruiting package, units/departments may consider showing to prospective faculty some of the apartments the university can make available as a landing place.

In summary, they are doing inventory and research analysis across the whole spectrum, from UG to Emeriti who wish to remain in contact with the university but seek a smaller, easy-maintenance residence.

Discussion:

To the question of our capacity, Toni replied that the final survey will provide more information. On the South Hill, in the future there will probably be about 250 beds for graduate and professional students and 150 for parenting housing. The UG sector will require mostly renovation of Wallace, Tower and Elmwood. There, is enough land plus the possible demo of Shoup and McConnecll, that we can expand up to 800 beds if needed. Furthermore, for the planned market rate employee housing, major employers in the area (SEL, Gritman, Pullman Regional) are experiencing similar problems when seeking to hire highly trained personnel who come to town but can’t find proper housing. Should we end up with more university employee housing than needed, renting living space to these local employers could be a source of revenue.

It was pointed out that extension students who come to the Moscow campus for a limited time also need a place to stay, in addition to housing in Southern Idaho. Toni responded that they are also considering setting aside space for visiting lecturers and extension people and for Study Abroad students.

A senator wondered whether establishing a relation with local “Airbnb” could help for short-term visitors. Toni replied that it could be an option (there 1,000 Airbnb in Moscow), but only for short-term living.

For any questions or feedback, reach out to Toni at [tonibroyles@uidaho.edu](mailto:tonibroyles@uidaho.edu)

#### **Chair’s Report:**

- We just heard presentations about admissions and housing, which are important factors for the long-term evolution of the university. If the university grows, are we ready for more students? What kind of growth can we accommodate?
- These types of conversations reinforce the role of senate leadership as a place of dialog and shared governance. Please help us make our role more efficient and productive, by providing your feedback.

#### **Provost’s Report:**

- 10<sup>th</sup> day data on Spring semester enrollment will be available next week.
- UI’s legislative presentations begin this week and will take place over the next 1-2 months. This is a different schedule than previous year. Vice Provost for Faculty Diane Kelly-Riley sent a communication to standard pay faculty on 1/19/2024 about tentative deferred pay implementation. Please visit:

<https://www.uidaho.edu/provost/faculty/salary/deferred-pay>

##### Discussion:

A senator inquired whether deferred pay is a “done deal” as far as Faculty Senate involvement is concerned. The Provost responded that the implementation will likely require changes in FSH/APM and, thus, Senate will be involved. Implementation plans are ongoing and the President supports what’s being done. As a follow-up, the senator suggested making this point clearer on the webpage.

#### **Changes to the Administrative Procedures Manual (non-voting):**

- APM 45.09 Effort Reporting and Personnel Activity Reports – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs.

Change of our effort reporting system and process needed to be reflected in the APM – from PAR to Effort Reporting, with the use of Banner.

##### Discussion:

There was a suggestion to clarify the meaning of “Hatch, Smith-Lever” in section B.

- APM 45.10 Facilities and Administrative (Indirect) Rate – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs.

Update for consistent format, to clarify statements and applicability for location and type, and change ‘Public Service/Outreach’ to ‘Other Sponsored Activity’ per our last F&A rate agreement.

##### Discussion: None.

- APM 45.12 Sponsored Project Closeout and Recordkeeping Responsibilities – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs.

Reformat to conform to standard APM style, clarify closeout and recordkeeping processes due to shift to electronic record keeping and other system changes. Mostly, changing nomenclature and formatting.

Discussion: None.

- APM 45.15 Subawards and Subcontracts – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs.

Clarification of the subaward request and issuance process to include new requirements and processes. No substantial changes in responsibilities, monitoring, or timelines. Adding 2 CFR 200 in place of the A-121 and A-133 references, and formatting to standard APM format.

Discussion: None.

- APM 95.21 University Closures – Shane Keen, Clery Compliance Officer, Public Safety and Security.

Comprehensive review. Language clarified throughout.

Discussion: None.

### **Announcements and Communications, Part 2:**

- FY24 CEC Summary – Kim Salisbury, Associate Vice President, Budget and Planning, DFA Budget and Planning.

Kim displayed a slide showing a summary of FY24 CEC. She went over the breakdown of the Gen Ed budget into various categories – across the board to address inflation, bring salaries up to 80% of target, merit funds, promotion and tenure increments, etc. The table also shows overall increase in salary over FY23; total merit increases; average starting percentage, average increase percentage, and average final percentage of target; number of CEC eligible and CEC non-eligible employees; number of employees receiving merit increases; number of employees brought up to 80% of target; number of eligible employees still below 80% of target.

**The slide with the detailed data is attached to these minutes.**

Discussion:

Kim explained how the \$600 for across-the-board increases came to be. Working backwards from the total Gen Ed budget, they addressed priorities such as raising salaries to 80% of target, then met other Gen Ed obligations. What was left, in steps of \$100, amounted to \$600 per FTE. Provost Torrey added that this year a percentage increase was recommended, rather than a flat number for all eligible employees.

Clarification was asked about the group of eligible employees still below 80% of the target. This is due to grant funding in a small number of areas.

- Parking – Steve Mills, Director, Parking and Transportation Services.

Availability: One of the aspects that senators wanted to discuss is the reason why in the Greek housing area, (Blake, Taylor, Sweet and 7<sup>th</sup>), all parking permits are purple or magenta. This is to provide parking to students who bring a car to campus. Some students also use the gravel area west of the Kibbie Dome.

The second question was about the cost and how it is determined: Since 2009, our parking permits have gone up about 40%, which is consistent with the nationwide increase, and less than 72% of the universities that they looked up.

Discussion:

Why not adopt a sliding scale, where the cost of the permit is commensurate to one's salary? Steve does not see this as an equitable solution. The university salary may be only one source of an individual's income. Also, with income-based permit costs, more employees will be able to purchase gold permits, which will create additional problems. Eventually, with this model, parking would become underfunded. Lots are very expensive to maintain.

Why should we pay for parking at all? Most employers provide parking. Vice President Foisy addressed this question. Parking must be a fully self-sustained, auxiliary operation by SB mandate. No Gen Ed funds can go into it.

Moscow is walkable and there is public transportation to campus, but what about people who live outside of Moscow? Are students promised a parking spot if they have a car on campus? Yes, they are, although -- Dean of Students Blaine Eckles added -- it's a challenge. They discourage students from bringing a car to campus.

The presentations on Computing Resources Available for Research, and the Report from the Ubuntu Committee were postponed due to the late hour.

**New Business:**

None.

**Adjournment:**

The agenda not being completed, the Chair called for a motion to adjourn. So moved (Tibbals, Mittelstaedt). The meeting was adjourned at 5:02pm.

Respectfully Submitted,

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

**FY24 CEC SUMMARY**

**Snapshot as of 05.18.2023**

	Staff GenEd	Staff GenEd	Non-Staff Total	Faculty GenEd	Faculty GenEd	Non-Faculty Total	GenEd Total	Non-GenEd Total	Grand Total	Staff % of Total	Faculty % of Total
FY24 Target Salary	\$ 47,763,716	\$ 44,172,405	\$ 91,936,121	\$ 48,478,160	\$ 23,963,002	\$ 72,441,162	\$ 96,241,876	\$ 68,135,407	\$ 164,377,282	55.93%	44.07%
Pre-CEC Salary	\$ 42,030,925	\$ 44,401,786	\$ 86,432,711	\$ 43,599,797	\$ 22,577,863	\$ 66,177,660	\$ 85,630,722	\$ 66,979,649	\$ 152,610,371	56.64%	43.36%
Across the Board Increase \$600 per 1 FTE	\$ 397,537	\$ 475,568	\$ 873,104	\$ 286,895	\$ 153,665	\$ 440,559	\$ 684,431	\$ 629,232	\$ 1,313,664	66.46%	33.54%
Up to Minimum Classified/Exempt Minimums	\$ 120,725	\$ 79,669	\$ 200,394	\$ -	\$ 1,336	\$ 1,336	\$ 120,725	\$ 81,005	\$ 201,730	99.34%	0.66%
Up to 80% of Target	\$ 477,432	\$ 189,625	\$ 667,057	\$ 102,019	\$ 35,285	\$ 137,304	\$ 579,451	\$ 224,910	\$ 804,361	82.93%	17.07%
Merit Pool Funds	\$ 506,427	\$ -	\$ 506,427	\$ 459,765	\$ -	\$ 459,765	\$ 966,192	\$ -	\$ 966,192	52.41%	47.59%
Promotion and Tenure Increments	\$ -	\$ -	\$ -	\$ 178,940	\$ 272,283	\$ 451,224	\$ 178,940	\$ 272,283	\$ 451,224	0.00%	100.00%
University-Wide CEC	\$ 1,502,120	\$ 744,862	\$ 2,246,982	\$ 1,027,620	\$ 462,568	\$ 1,490,188	\$ 2,529,740	\$ 1,207,430	\$ 3,737,171	60.13%	39.87%
Additional Unit Funded Non-Merit	\$ 267,234	\$ 667,503	\$ 934,736	\$ 185,654	\$ 364,876	\$ 550,530	\$ 452,888	\$ 1,032,379	\$ 1,485,266	62.93%	37.07%
Additional Unit-Funded Merit	\$ 74,262	\$ 386,022	\$ 460,284	\$ 53,382	\$ 260,589	\$ 313,971	\$ 127,644	\$ 646,611	\$ 774,255	59.45%	40.55%
Additional Unit-Funded Increases	\$ 341,495	\$ 1,053,525	\$ 1,395,020	\$ 239,036	\$ 625,465	\$ 864,501	\$ 580,531	\$ 1,678,989	\$ 2,259,521	61.74%	38.26%
<b>Total CEC Investment in Salaries</b>	<b>\$ 1,843,616</b>	<b>\$ 1,798,387</b>	<b>\$ 3,642,002</b>	<b>\$ 1,266,656</b>	<b>\$ 1,088,033</b>	<b>\$ 2,354,689</b>	<b>\$ 3,110,272</b>	<b>\$ 2,886,420</b>	<b>\$ 5,996,691</b>	<b>60.73%</b>	<b>39.27%</b>
Final FY24 Base Salary	\$ 43,835,374	\$ 46,240,342	\$ 90,075,716	\$ 44,955,370	\$ 23,582,009	\$ 68,537,379	\$ 88,790,744	\$ 69,822,350	\$ 158,613,094	56.79%	43.21%
Overall Increase in Salary over FY23	4.29%	4.14%	4.21%	3.11%	4.45%	3.57%	3.69%	4.24%	3.93%		
Total Merit Increases (Pool + Unit Funds)	\$ 580,689	\$ 386,022	\$ 966,711	\$ 513,148	\$ 260,589	\$ 773,736	\$ 1,093,836	\$ 646,611	\$ 1,740,447	55.54%	44.46%
Starting Average % of Target			89.72%			92.41%			90.66%		
Average Increase as % of Target			3.87%			3.34%			3.69%		
Final Average % of Target			93.59%			95.75%			94.34%		
# Eligible Employees			1475			737			2,212	66.68%	33.32%
# Employees Not Eligible for CEC			112			27			139		
# Employees Brought up to 80% of Target			184			41			225	81.78%	18.22%
# Employees Receiving Merit			507 34.4%			340 46.1%			847 38.3%	59.86%	40.14%
# Eligible Still Below 80% of Target Due to Funding			14			2			16	87.50%	12.50%

Calculations do not include employees ineligible for CEC or the President (SBOE determines)

University of Idaho  
2023 – 2024 Faculty Senate Agenda

Meeting #18

Tuesday, January 23, 2024 at 3:30 pm  
Zoom Only

- I. Call to Order
- II. Approval of Minutes
  - Minutes of the 2023-24 Faculty Senate Meeting #17 January 16, 2024 **Attach. #1**
- III. Announcements and Communications, Part 1
  - Admissions Standards - Use of Standardized Tests for Admission Decisions – Dean Kahler, Vice Provost, Strategic Enrollment Management **Attach. #2**
  - P3 Update – Toni Broyles, Special Assistant to AVP Auxiliary, Cami McClure, Assistant Vice President, Auxiliary Services
- IV. Chair’s Report
- IV. Provost’s Report
- V. Committee Reports (non-voting)
  - APM 45.09 Effort Reporting and Personnel Activity Reports – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs **Attach. #3**
  - APM 45.10 Facilities and Administrative (Indirect) Rate – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs **Attach. #4**
  - APM 45.12 Sponsored Project Closeout and Recordkeeping Responsibilities – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs **Attach. #5**
  - APM 45.15 Subawards and Subcontracts – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs **Attach. #6**
  - APM 95.21 University Closures – Shane Keen, Clery Compliance Officer, Public Safety and Security **Attach. #7**
- VI. Announcements and Communications, Part 2
  - FY24 CEC Summary – Kim Salisbury, Associate Vice President, Budget and Planning, DFA Budget and Planning
  - Parking – Steve Mills, Director, Parking and Transportation Services
  - Computing Resources Available for Research – Lucas Sheneman, Director, Northwest Knowledge Network, Institute for Interdisciplinary Data Science, Joe Leister, HPC Systems Administrator, Institute for Interdisciplinary Data Science
  - Report from the Ubuntu Committee – Aleksandra Hollingshead, Department Chair, Curriculum and Instruction
- VII. New Business

## VIII. Adjournment

### Attachments

- **Attach. #1** Minutes of the 2023-24 Faculty Senate Meeting #17 January 16, 2024
- **Attach. #2** Admissions Standards
- **Attach. #3** APM 45.09
- **Attach. #4** APM 45.10
- **Attach. #5** APM 45.12
- **Attach. #6** APM 45.15
- **Attach. #7** APM 95.21



**2023 – 2024 Faculty Senate – Pending Approval**

Meeting # 17

Tuesday, January 16, 2024, 3:30 pm – 5:00 pm

Zoom only

**Present:** Barannyk, Blevins, Chapman, Gauthier (Chair), Haltinner (Vice Chair), Justwan, Kenyon, Kirchmeier, Torrey Lawrence (w/o vote), Long, McKenna, Mittelstaedt, Murphy, Ramirez, Raney, Roberson, Rinker, Sammarruca (w/o vote), Schiele, Schwarzlaender, Tibbals.

**Absent:** Maas (excused), Hobbs, Miller, Reynolds, Shook

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

**Approval of Minutes (vote):**

The minutes of the 2023-24 Meeting #16, January 9, 2024, were approved as distributed.

**Consent Agenda:**

- Sabbatical Leave Committee Recommendations.  
Approved by unanimous consent.

**Chair's Report:**

- Check out the Daily Register for interesting events coming up, such as: <https://www.kenworthy.org/events-calendar/backcountry-film-festival-2/> and
- <https://www.uidaho.edu/cogs/resources/workshops> (particularly the CIRTl workshop series).
- An important part of today's meeting is a conversation about the optional retirement plan (ORP), which in December 2024 is transitioning to Fidelity as the sole retirement plan provider, replacing TIAA and Corebridge Financial. We appreciate Brandi, Director of HR, visiting us today at short notice, to provide more information about the transition.

**Provost's Report:**

- Spring semester enrollment has remained stable.
- There are problems with broken pipes due to the frigid weather. We are grateful to Facility for their prompt intervention.
- Vice Provost for Faculty Diane Kelly-Riley announced the next faculty gathering, hosted by CBE in the Albertson Atrium, January 24, 2024, 4:30 – 6:30pm. Please RSVP at <https://www.uidaho.edu/provost/faculty-gathering>

**Changes to the Administrative Procedures Manual (non-voting):**

- APM 30.18 Change Management – Theresa Amos, Deputy Director, IT Planning and Initiatives, Office of Information Technology.  
This policy establishes the mechanism for verifying and approving changes to university managed technology resources. Changes to information systems are required on both a regular and emergency basis to fix issues, add new functionality, address new security and compliance requirements, and improve the user experience. Due to the complexity of modern technology systems, such changes must be carefully reviewed, performed, and vetted as, if done improperly, can cause disruptions, weaken security postures, and cause a loss of data. To address this, as well as assist in the University's compliance requirements, this policy ensures

that: changes are performed in a way to minimize risks to the university; all security and compliance requirements remain enforced consistent with U of I standards and principles of least privilege and functionality; all impactful changes to technology resources are tracked and approved in a timely manner.

Discussion:

In response to a question about the timeline for communicating changes, Teresa Amos will Provide a link to the calendar with dates for the implementation of changes.

- APM 95.24 Vandal Alert Notification System – Lee Espey, Division Operations Officer, DFA Operations, Steve Mills, Director of Parking and Transportation Services. Comprehensive review to clarify language throughout.

Discussion: none

- APM 45.03 Definitions for Grants, Contracts and Gifts – Sarah Martonick, Director, Office of Sponsored Programs (OSP), Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs.

While reviewing APM 71.52, the OSP team and the UI Foundation staff determined it should point to APM 45.03 and focused on revisions to APM 45.03. Revisions are minor, with no procedural additions, only clarifications and updates for use of TDX vs. PDF forms.

Discussion:

The Secretary proposed to modify the first sentence in APM 45.03 C-1 to read: *“A sponsored project is the result of an authorized proposal or application submitted by the university that results in an agreement between the university and the sponsor.”*

There was a brief discussion on the difference between a solicited process and a competitive one.

A senator inquired about potential impacts of these revisions, for instance, on workload.

Response: The OSP team has thought very carefully about volume and burden, for this and many other APM sections. They moved to TDX because it provides metrics on volume and a concrete measurement of turnaround time. It takes an average of 5 days for every item coming out of TDX. This is a significant increase, while the team reports spending less time for tracking. On the one hand, they would like to reduce the burden, on the other, they have regulations to comply with. They design their processes around best practices and try to achieve a good balance. Recently, a new person has joined the team, who will work on a mechanism for assessment and feedback to determine where actual measurable gaps are and what infrastructure needs to be added or modified.

The Secretary asked for clarification concerning the university having the obligation to provide a deliverable (APM 45.03 C-1). Response: As the contracted party in all sponsored projects, the university assumes the obligation in the agreement, but delegates it to the PI (see APM 45.06).

- APM 45.04 Notice of Sponsored Projects and Establishment of Budgets – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs. Comprehensive review is necessary to bring policies up to current requirements for sponsored project regulations, and to clarify Chart V nomenclature (budget vs. fund/index, etc.). Mostly, language revisions to comply with the recommendations from a prior NSF audit.

Discussion:

In response to a question, it was clarified that no changes in VERAS are needed as a consequence of these revisions. What's in VERAS will remain as is.

- APM 45.06 Allowable and Unallowable Sponsored Project Expenditures – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs.  
Comprehensive review is necessary to bring policies up to current requirements for sponsored project regulations, and to clarify Chart V nomenclature (budget vs. fund/index, etc.).  
Discussion:  
This item was briefly discussed together with APM 45.03. There were no further questions.
- APM 45.07 Cost Transfers on Sponsored Projects – Sarah Martonick, Director, Office of Sponsored Programs, Office of Research Assurances, Heather Clark, Accounting Manager II, Office of Sponsored Programs.  
Like for the previous APM 45, change of nomenclature and clarification.  
Discussion: none.

### Announcements and Communications

- SUCCESS – Daniel Eveleth, Department of Business, Erin Chapman, School of Family and Consumer Sciences.  
Daniel started with a brief introduction. SUCCESS is a task force charged by the President with identifying three initiatives with the objective of increasing our current six-year graduation rate of 61% to 77% (the average for R1 universities). The President's charge focuses on instruction- and curriculum-based initiatives for which there is evidence of success. The task force started with the Boyer Report and came up with six possible topics, see attachment #9. Note that the attached document contains a link to a feedback form for people to provide comments and suggestions. An important part of the feedback the team is looking for are success stories, namely, what is being done in departments/units that is working well. This way, the team can identify U of I strengths to build on and focus on those programs that are best for us. SUCCESS will come back to Faculty Senate later in the semester to discuss more targeted questions, as they may result from the collected feedback.  
Discussion:  
A senator noted that there are many UG research opportunities at the U of I, but we need more support and more people. The UG Research Office is understaffed and underfunded. Citing from her work with Ubuntu, Vice Chair Haltinner recalls that retention rates for white students are higher than for students of color. Some of her research indicates that a more creative, integrative and robust Gen Ed curriculum might help reduce the gap by addressing student needs with an individualized, holistic approach. Furthermore, with the first-year seminar gone, we must re-envision an appropriate first-year experience. Kristin added that the Diversity Scholar Program from Multicultural Affairs is doing very well – retention rate for students in that program is about 90%.  
Back to the discussion of an appropriate first-year experience, a senator wondered whether the team is thinking about something like ISEM 101, or something discipline-specific and housed in a particular unit – in his department, first-year experience courses within the major are very important. Daniel responded that all feedback is welcome and valuable. The discussion later in the spring will be more targeted.  
Chair Gauthier said that UG research should be compensated. Also, if available UG researcher positions were posted, it would be great for retention.

A senator reported a rather disappointing response to the many research opportunities she offered to her students in a large introductory math class.

- Vandal Gateway Program (VGP) Update – Annette Folwell, Associate Dean, College of Letter, Arts and Social Sciences, Brian Dulin, Program Coordinator, Vandal Gateway Program, Sean Quinlan, Dean, College of Letter, Arts and Social Sciences.  
Sean Quinlan started with a brief introduction to the VGP and the team members. The presentation is attached to these minutes. The following points were addressed: The structure of the program (admission process, cohort nature of the student group, staff and faculty, some demographic data); Academic standing for AY 2022-23 and AY 2023-24; Persistence, Retention, and Awards for AY 2022-23 and AY 2023-24. They are pleased with the success of VGP (e.g. improvement in academic standing), and excited to work with a program that opens doors for students who would otherwise not be able to attend college.

Discussion:

A senator inquired about the consistency of the comparison – the data from AY 2022-23 are being compared with those from one semester of AY 2023-24. Annette Folwell replied that a comparison between data from two full academic years will be possible when the second semester of AY 2023-24 ends. The team would be happy to come back later in the spring.

- Optional Retirement Plan (ORP) – Brandi Terwilliger, Director of Human Resources.  
Brandi provided a brief background on the upcoming (December 2024) change from TIAA-CREF to Fidelity as the sole vendor for ORP. This was a state-wide decision from SBOE. See FAQ at <https://boardofed.idaho.gov/resources/optional-retirement-plan-transition-to-fidelity-as-sole-retirement-plan-provider/>  
The Idaho State Board of Education (SBOE) Retirement Plan Committee completed a multi-year, comprehensive review of the Idaho ORP. As a result of their review, they approved that Fidelity would become the sole provider of the administrative services for the ORP effective December 2024, replacing both TIAA and Corebridge. This choice will result in increased on-campus presence, and a 25% reduction in the fee to the participant.

Discussion:

A senator asked whether, because of the transition, there will be a lag in time during which our funds are out of the market. Response: We are working to make sure there is no lag. We expect a seamless transition.

In response to another question, Brandi clarified that supplemental plans do not need to be transitioned.

A senator argued that some constituents were angry at the lack of transparency, and because they had no say in the matter and no option. It would be helpful if university communications were more proactive than responsive. Brandi explained that, when this process started, before COVID, there was a lot of discussion about what to do for the best of of our employees. The senator’s comment about more proactive communication is reasonable. Provost Lawrence added that, in this case, the news was about an improvement for all.

In response to a request, Brandi will check out ratings for TIAA-CREF vs. Fidelity. She will also inquire about bitcoin.

A senator reported that Colorado State transitioned to Fidelity as well. His colleagues are happy with the change.

**New Business:**

None.

**Adjournment:**

The agenda being completed, the meeting was adjourned at 4:55pm.

Respectfully Submitted,

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



**University**  
*of Idaho*

# **VANDAL GATEWAY PROGRAM (VGP) ANNUAL REPORT**

**DEAN SEAN QUINLAN**

**ANNETTE FOLWELL, ASSOCIATE DEAN**

**BRIAN DULIN, VGP COORDINATOR**

**COLLEGE OF LETTERS, ARTS, AND  
SOCIAL SCIENCES**

# VANDAL GATEWAY PROGRAM

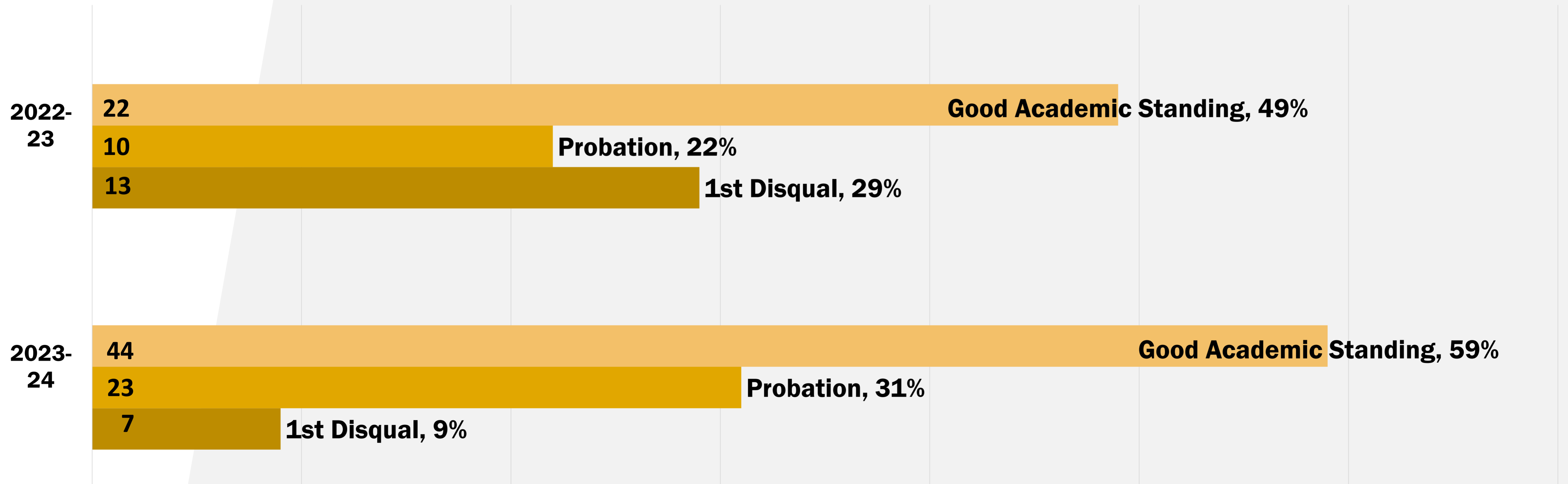
- I Allows students slightly below our usual admissible standards to be directly admitted to UI (2.3-2.59 GPA)
- I For their 1st year, students take General Education courses along with courses in their anticipated major
- I VGP has dedicated staff and faculty that advise, mentor, and teach students
- I After 1<sup>st</sup> year, VGP student transfer to their chosen major
- I 75% of VGP students served are Idaho residents
- I 48% of VGP students served are first-generation college students



# ACADEMIC STANDING

**I** AY 2022–23: 45 VGP students (47 attended but 2 withdrew)

**I** AY 2023–24: 77 VGP students (84 attended but 7 withdrew)





# PERSISTENCE, RETENTION, AND AWARDS

## AY 2022-23:

- 88% persisted from fall to spring and 50% were retained for Fall '23
- 5 additional students returned for the Spring '24 semester (three Fall 22 students did not attend in Fall '23, but returned spring '24 and two spring '24 students did not attend fall '23, but returned spring '24)
- 3 students transferred to other institutions
- 9 students achieved a 3.0 or higher GPA and earned CLASS one-time awards

## AY 2023-24:

- 85% persisted from fall to spring
- 2 students transferred to another institution
- 20 students achieved a 3.0 or higher GPA and earned CLASS one-time awards

# WINS, LESSONS, AND LOOKING AHEAD

- I All the right pieces are now in place:
  - Direct admissions policy, well-qualified and effective VGP Coordinator hired, and additional faculty and advisor hired
- I Significant improvement in student achievement (10% increase of Good Academic Standing and 20% decrease in 1<sup>st</sup> DQ)
- I VGP opens doors for students who otherwise could not attend college
  - VGP serves multiple colleges and increases overall UI enrollments
  - Students who transfer from UI, while not ideal, are success stories
- I Financially self-sustaining and remained within original budget
- I Develop a process for VGP students to be considered for **Idaho Opportunity** or **Go Idaho** scholarships after completion of first year



University  
of Idaho

# UNDERGRADUATE ADMISSION STANDARDS

INSTITUTIONAL RESEARCH

# 22-23 CATALOG ADMISSION STANDARDS



1. Submit ACT or SAT scores if available. New first-year students entering in 2022 or 2023 who are unable to sit for an ACT or SAT exam due to COVID-19 will automatically be considered for admission if their cumulative unweighted GPA is 2.60-4.00. Those who have cumulative GPAs of 2.30 - 2.59 who are unable to sit for an exam will be admitted through the [Vandal Gateway Program](#). Students in this GPA range are also welcome to appeal through our [Admissions Committee](#). **Every student who has a test score is encouraged to provide it for admission as well as class placement.**
2. Graduate from a regionally accredited high school with a combination of cumulative GPA<sup>1</sup> and test scores<sup>2</sup> as defined in the following table:

High School GPA	ACT Composite	SAT Evidence-Based Reading & Writing + Math (SAT taken March 2016 and after)	SAT Critical Reading + Math (SAT taken prior to March 2016)
3.00 - 4.00	Any test score	Any test score	Any test score
2.60 - 2.99	Any test score	Any test score	Any test score
2.50 - 2.59	17 - 36	910-1600	830-1600
2.40 - 2.49	19 - 36	990-1600	910-1600
2.30 - 2.39	21 - 36	1070-1600	990-1600
2.20 - 2.29	23 - 36	1140-1600	1070-1600

# 22-23 CATALOG ADMISSION STANDARDS



High School GPA	ACT Composite	SAT Evidence
3.00 - 4.00	Any test score	Any test score
2.60 - 2.99	Any test score	Any test score
2.50 - 2.59	17 - 36	910-1600
2.40 - 2.49	19 - 36	990-1600
2.30 - 2.39	21 - 36	1070-1600
2.20 - 2.29	23 - 36	1140-1600

**I** Either achieve a 2.6+ High School GPA or obtain a lower GPA with an increasing, sliding scale test score

**I** The vast majority of incoming new frosh have a 2.6 High School GPA or better

Fall Term	Frosh Cohort Total	No ACT / SAT	Pct No Test	Had HS GPA 2.6+	Had 2.6+ (%)
201510 - Fall 2015	1587	43	3%	1495	94%
201610 - Fall 2016	1660	28	2%	1540	93%
201710 - Fall 2017	1537	37	2%	1431	93%
201810 - Fall 2018	1434	19	1%	1330	93%
201910 - Fall 2019	1475	19	1%	1378	93%
202010 - Fall 2020	1425	20	1%	1334	94%
202110 - Fall 2021	1656	474	29%	1571	95%
202210 - Fall 2022	1951	606	31%	1808	93%
202310 - Fall 2023	1869	715	38%	1732	93%



# RETENTION BY HIGH SCHOOL GPA

High School GPA	STATUS	Fall 2021		Fall 2020		Fall 2022	
		N	Retention Pct	N	Retention Pct	N	Retention Pct
	GONE	14		8		15	
	HERE	18	56%	22	73%	47	76%
[3.00 - 4.00]	GONE	314		249		372	
[3.00 - 4.00]	HERE	1056	77%	905	78%	1239	77%
[2.60 - 3.00]	GONE	97		85		83	
[2.60 - 3.00]	HERE	104	52%	95	53%	114	58%
[2.50 - 2.60]	GONE	12		9		9	
[2.50 - 2.60]	HERE	9	43%	12	57%	13	59%
[2.40 - 2.50]	GONE	5				16	
[2.40 - 2.50]	HERE	10	67%			16	50%

# RETENTION BY HIGH SCHOOL GPA



Fall Term	Frosh Cohort Total	Overall Retained	Overall Retained (%)	Retention HS GPA 3.0+	Retention HS GPA [2.6-3.0]
201510 - Fall 2015	1587	1218	77%	81%	59%
201610 - Fall 2016	1660	1343	81%	84%	71%
201710 - Fall 2017	1537	1227	80%	85%	61%
201810 - Fall 2018	1434	1089	76%	81%	54%
201910 - Fall 2019	1475	1123	76%	81%	56%
202010 - Fall 2020	1425	1048	74%	78%	53%
202110 - Fall 2021	1656	1205	73%	77%	52%
202210 - Fall 2022	1951	Not available yet			



# RETENTION BY HIGH SCHOOL GPA

	Retention - Returning One Year Out / Fall-to-Fall								
High School GPA	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022	
[3.00 - 4.00)	81%	84%	85%	81%	81%	78%	77%	77%	
[2.60 - 3.00)	59%	71%	61%	54%	56%	53%	52%	58%	





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### Faculty Staff Handbook (FSH)

Addition  Revision\*  Deletion\*  Emergency  Minor Amendment  
Policy Number & Title:

### Administrative Procedures Manual (APM)

Addition  Revision\*  Deletion\*  Emergency  Minor Amendment  
Policy Number & Title: **45.09 -- Effort Reporting and Personnel Activity Reports**

\*Note: If revision or deletion, request original document from [ui-policy@uidaho.edu](mailto:ui-policy@uidaho.edu). All changes must be made using "track changes."

**Originator: Sarah Martonick**

**Policy Sponsor, if different from Originator: Chris Nomura, VPRED**

**Reviewed by General Counsel**      X Yes \_No Name & Date: Manisha Wilson, 12/29/23

- 1. Policy/Procedure Statement:** Briefly explain the reason for the proposed addition, revision, and/or deletion.  
Change of our effort reporting system and process needed to be reflected in the APM – from PAR to Effort Reporting, with the use of Banner.
- 2. Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have?  
None – we moved to using Banner last year.
- 3. Related Policies/Procedures:** Describe other UI policies or procedures related or similar to this proposed change, or that will be impacted by it.  
None
- 4. 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.

## 45.09 -- Effort Reporting and Personnel Activity Reports (PARs)

December 2018 (rewrite) Certifications

**A. General Purpose.** The University of Idaho (University) is required by federal regulations (2 CFR 200.430) and accounting standards to ensure that the allocation of compensation for all employees accurately reflects the work performed by these individuals in connection with sponsored projects. This document sets forth University policy for the commitment and verification of effort expended by university employees on sponsored projects.

**B. Scope.** This policy is applicable to all non-temporary employees whose time is charged as a direct cost to sponsored projects, whether as a direct cost or as cost share or is charged to other Federal funds (Hatch, Smith-Lever, etc.). ~~Definitions.~~

### C. Definitions: ~~B~~

**C-1. Cost Sharing.** The portion of the total project costs for a sponsored project that is borne by the University rather than the sponsor. See [APM 45.08](#) for definitions of types of cost share.

**BC-2. Effort** (also referred to as "actual effort"): ~~the~~The time spent in pursuit of a particular activity and expressed as the percentage of one's University appointment devoted to one or more activities.

**BC-3. Effort Reporting.** ~~the~~The process ~~through~~by which the University verifies and documents that the effort expended by an employee corresponds with the effort he or she has charged to or contributed to (as cost share) sponsored activity.

**BC-4. Institutional Base Salary (IBS).** ~~the~~The annual compensation paid by the University to an employee, irrespective of the nature of the activities in which the employee is engaged while fulfilling the requisites of their appointment; e.g. research, instruction, service, and administration. IBS excludes any income that an individual may earn outside of the University ~~or income earned as additional compensation for duties outside of their primary appointment. Note that administrative stipends for Chair, Dean, or other similar roles are included in the IBS definition.~~ The IBS for each faculty member ~~or employee~~ is enumerated in the ~~faculty member's~~ annual salary letter ~~or as an amendment during the appointment period.~~ Charges for work performed on sponsored projects are only allowable at the IBS rate. (See 2 CFR 200.430)

**BC-5. Person mMonths.** ~~the~~The method typically used in sponsored project applications to express the amount of effort that the Principal Investigators (PIs), other faculty, or key employees devote to a specific project, expressed in terms of time rather than a percentage of one's appointment.

**D. Policy.** Effort reporting begins at the proposal stage and is ultimately accomplished through review and verification of eEffort rReports.

**D-1. ~~C~~-Federal rRequirements.** Failure to produce reasonably accurate estimates of effort, or to otherwise comply with federal cost requirements, can result in financial penalties, expenditure disallowances, withholding of future sponsored project awards by an agency, and damage to the reputation of the University. Providing inaccurate estimates of effort, whether knowingly or through carelessness or mismanagement, may be regarded as fraud and may subject the University and the certifying individual to civil proceedings and criminal prosecution.

~~D-2. D. Policy.~~ Effort reporting begins at the proposal stage and is ultimately accomplished through review and verification of Effort Reports.

~~D-1.~~ **Proposal stage.** When preparing proposals for sponsored projects, the primary responsibility for establishing a reasonable estimate of the effort necessary to carry out the project rests with the PI.

a.) In determining the amount of effort that will be devoted to the proposed project, the PI must consider existing effort commitments to other sponsored projects, University duties associated with ~~his or her~~their appointment, and the ability of other key project personnel who are to be involved in the project to make contributions of effort necessary for its success.

b.) In addition to ensuring that ~~the~~ proposed effort commitment conforms to University expectations and policy, the PI must also make certain that it is consistent with the parameters established by the sponsor.

~~Faculty Staff Handbook~~FSH 3120, ~~Faculty Obligations during Period of Appointment~~3120 ~~Faculty Obligations During Period of Appointment;~~ 3140, ~~Performance Expectations for Faculty;~~ FSH 3260, Professional Consulting and Additional Workload, FSH 5600, Financial Disclosure Policy, FSH 5650, Financial Conflicts of Interest in Public Health Service Research, and FSH 6240 Conflicts of Interest and Commitment provide additional information in regards to calculating the appropriate amount of effort to propose on sponsored programs.

c.) While federal agencies may require that proposed effort be expressed in terms of person months, the University requires that employees verify actual effort expended in terms of percentages of effort. -The Office of Sponsored Programs (OSP) will assist with the translation of effort between these two methods.

d.) Calculating effort using a percentage basis fosters employee compliance with effort reporting requirements by encouraging an individual to estimate ~~his or her~~their effort on a given activity as a percentage of ~~his or her~~their total University activities rather than as a fraction of a fixed time-period (such as the forty-hour week). -This process acknowledges that some fluctuation in effort levels is inherent in the conduct of academic activities.

**D-23. Award sStage.** Once a sponsor makes an award, the provisional effort commitments included in the proposal become mandatory, and the oversight and reporting of effort for faculty and staff associated with the award becomes required.

a.) Because effort reporting is based on payroll records, it is crucial that Electronic Personnel Action Forms (EPAFs) are accurately and expeditiously completed and entered into the payroll distribution system. -Salary allocations associated with a new award must be reviewed and approved by the PI-(s) for the project prior to the entry of this information into EPAFs. -Awards that are close to ending also need to be monitored to ensure EPAFs are completed ~~to that~~ remove employees from these projects in a timely manner.

b.) Consistent with committed effort, distributions of salary on sponsored project or cost sharing accounts should coincide with the commencement of actual effort by the employee on the sponsored project.

**D-34. Effort Reporting.**

**a.)** Drawing on data from the university payroll distribution system, the **eEffort rReport** allows an individual to review payroll salary allocations, represented as percentages of total effort, and to indicate whether the allocations reasonably correspond to ~~his or her~~ the individual's actual percentage of effort expended on each project or activity.

**b.)** Semi-annually an **eEffort rReport** will be electronically generated for and made available online to each employee whose compensation was partially or totally charged to or committed as cost sharing to a sponsored project.

**c.)** Reported effort must be as accurate as possible. -Up to five percent variance above or below the estimated effort for any given project is permitted without requiring modification of salary allocations.

**d.)** In cases in which actual effort differs from estimated effort by more than ~~five (5)~~ 5 percent or a project or activity is missing from the **eEffort rReport**, the employee shall notify the appropriate Department Grant Administrator that a change may be necessary to realign salary and effort.

**e.)** Effort **rReports** must be completed within ~~thirty (30)~~ working days of the date they are released to the employee.

**1.)** If circumstances occur that are outside the university's control (e.g. weather conditions, power loss, etc.) the date for the **eEffort rReport** completion may be adjusted accordingly.

**2.)** Effort **rReports** must be completed by the individual whose effort is being reported or by a person who has a suitable means of verification (direct and personal knowledge) of the effort expended.

**(a) i)** ~~PIs and Co-PIs should certify their own effort reports. -PI's, providing they have they have PIs with~~ PIs with direct knowledge, can certify the **eEffort rReports** of the employees working on their sponsored projects, but employees should complete their respective effort reports, if possible. The Principal Investigator listed in the FRAGRNT form in Banner will be responsible for completing effort reports for each graduate assistant working on their grant(s).

**(b) ii)** Department Grant Administrators, or other administrators, are not presumed to have the requisite means of verification; they may complete effort reports only if they have a written and signed confirmation of effort by an individual with direct knowledge of the activities of the person for whom the report was generated and only when that individual is unavailable to complete the **eEffort rReport**.

**(c) iii)** If extraordinary conditions preclude a faculty member from completing their **eEffort rReport**, and no written and signed confirmation of effort can be obtained, the faculty member's unit administrator or college dean will determine the best means for verification of effort expended and an appropriate proxy will be entered in the effort report system.

**3.)** Failure to certify **eEffort rReports** in a timely manner may result in suspension of activity on any or all sponsored projects involved and limit the ability of the noncompliant individual to apply for other sponsored project funding.

**EE. Contact iInformation.** For information and help please contact the Office of Sponsored Programs at 208-886-6651, or [osp@uidaho.edu](mailto:osp@uidaho.edu).

## **G. Related policies**

- [FSH 3120 Faculty Obligations During Period of Appointment](#)
- [FSH 3260 Professional Consulting and Additional Workload](#)
- [FSH 5600 Financial Disclosure Policy](#)
- [FSH 5650 Financial Conflicts of Interest in Public Health Service Research](#)
- [FSH 6240 Conflicts of Interest and Commitment](#)



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**Faculty Staff Handbook (FSH)**

Addition  Revision\*  Deletion\*  Interim  Minor Amendment  
Policy Number & Title:

**Administrative Procedures Manual (APM)**

Addition  Revision\*  Deletion\*  Interim  Minor Amendment  
Policy Number & Title: **APM 45.10 FACILITIES AND ADMINISTRATIVE (INDIRECT) RATE**

\*Note: If revision or deletion, request original document from [ui-policy@uidaho.edu](mailto:ui-policy@uidaho.edu). All changes must be made using “track changes.”

**Policy originator: Sarah Martonick**

**Policy sponsor, if different from originator: Chris Nomura, VPRED**

**Reviewed by General Counsel:** Yes No Name & Date: Manisha Wilson, 12/29/23

**Comprehensive review?** Yes No

1. **Policy/Procedure Statement:** Briefly explain the reason for the proposed change.

Update for consistent format, to clarify statements and applicability for location and type, and change ‘Public Service/Outreach’ to ‘Other Sponsored Activity’ per our last F&A rate agreement.

2. **Fiscal Impact:** What fiscal impact, if any, will this change have?

None – applicable timeframes and policy remains the same

3. **Related Policies/Procedures:** Describe other UI policies or procedures related or similar to this proposed change, or that will be impacted by it.

None.

4. **Effective Date:** This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 H) unless otherwise specified.

## 45.10 -- Facilities and Administrative (Indirect) Rate

**A. Purpose.** The purpose of this policy is to outline the process by which the University determines the applicable indirect (F&A) rate for a sponsored projects.

**B. Scope.** This policy is applicable to all sponsored project funding.

### C. Definitions

**C-1. Indirect rate.** Facilities and administrative (F&A) costs are those costs incurred for common or joint objectives and which therefore cannot be identified readily and specifically with a particular sponsored project, an instructional activity, or any other institutional activity (2 CFR 200 Appendix III.A.). These costs are real costs borne by the University in support of sponsored projects, and which the University is entitled to collect from sponsors. Due to the difficulty of assigning F&A costs directly, approximately every four years the University negotiates an F&A (also known as "indirect cost" or "overhead") rate with the University's cognizant federal agency, the Department of Health and Human Services (HHS).

**C-2. Project types.** A project shall be categorized based on a determination of the "best fit" within the project types defined below. The Office of Sponsored Programs (OSP) shall be responsible for the final determination, if the project is difficult to classify.

**a. Instruction.** The instruction category includes all teaching and training activities that are part of an institution's instructional program. Instruction includes the following activities: 1) credit and noncredit courses; 2) community education programs; 3) academic, vocational, and technical instruction; 4) remedial and tutorial instruction; and 5) regular, special, and extension sessions.

**b. Organized research.** The organized research category includes the research, development, and research training activities of an institution. Research is defined as a systematic study directed toward fuller scientific knowledge or understanding of the subject studied. Development is defined as the systematic use of knowledge and understanding gained from research, directed toward the production of useful materials, devices, systems or methods including design and development of prototypes and processes. Training individuals in research techniques is classified as research when the activity utilizes the same facilities as other research activities and such activities are not included in the instruction function. Organized research includes all research and development activities that are externally sponsored by federal and non-federal agencies and organizations, as well as internally-funded University research that is project-based, proposal-driven, competitive, and separately budgeted and accounted for.

**c. Other sponsored activity (including public service/outreach).** This category is used for those projects that cannot be assigned to either a) or b). The public service category involves activities that primarily supply a benefit to the public or a specific segment of the public that is external to the institution. Examples of these activities include, but are not limited to, noninstructional community service programs, broadcasting services and cooperative extension services. Included in this category are conferences, institutes, general advisory services, reference bureaus, testing services, radio and television, consulting, and similar noninstructional services to particular sectors of the community.

**C-3. Project location.** Location is determined by evaluating where the majority of the work will be performed.

**a. On-campus projects.** Projects where the work is being performed in University-owned, -leased, or -operated facilities.

**b. Off-campus projects.** A project may be designated as "off-campus" if more than 2/3 of the work occurs at locations other than University-owned, -leased, or -operated facilities and the indirect costs associated with physical plant and library are not considered applicable. An off-campus rate may also be used if a project is conducted in leased space and the lease costs are directly charged to the project (leased space is normally considered to be on-campus). Projects will not be subject to more than one indirect cost rate. If determined to be off-campus, the off-campus rate will apply to the entire project.

**c) Agricultural and forestry research stations (experiment stations).** These activities are organized research activities with two-thirds or more of activity effort occurring at any of the experiment stations listed at the [Rates, Forms, and Resources Definitions](#) page on the ORED website.

**C-4. Administrative.** That portion of the F&A rate associated with central, unit, and research administration. This portion of the F&A rate is applicable to all sponsored projects, whether on- or off-campus (see definitions in C-3).

**C-5. Facilities.** That portion of the F&A rate associated only with on-campus activity (see C-3.a.), such as depreciation, interest, utilities, library, etc.

**D. Policy.** It is the policy of the University that, absent specific written sponsor limitations, all sponsored projects must budget and include the appropriate F&A expense based on both the type of project (research, instruction, or other sponsored activity) and location where the majority of the work is being done (on- or off-campus). Waivers of F&A may only be granted by the Vice President for Research and Economic Development or their designee. Because F&A waivers essentially shift the cost burden to the rest of the University, they are granted infrequently.

## **E. Procedure**

**E-1. F&A cost study.** The process for establishing F&A rates begins with the F&A cost study. This process involves analyzing all University expenditures for the purpose of assigning expenditures to either direct or indirect cost pools.

**a. Indirect cost pool allocations.** Indirect cost pool allocations end up as the numerators of each type of negotiated F&A rate, and include both facilities and administrative costs.

Facilities costs (see C-5) include:

- Building depreciation
- Equipment depreciation
- Capital improvements to buildings and land
- Operations and maintenance of plant
- Non-capitalized interest on capital expenditures
- Library costs

Administrative costs (see C-4) include:

- Unit administration
- Research administration
- Computer use charges
- General university administration
- Staff and spouse educational benefits



**b. Direct cost pool allocations.** Direct cost pool allocations include all costs that can be identified specifically to a given project or activity, and end up as the denominators (direct bases) for the F&A rate calculation. Examples of costs that are often considered to be direct are salaries and wages, benefits, travel, materials and supplies, etc. By their nature, these costs can be easily and directly assigned to particular projects or activities with a high degree of accuracy. These costs are generally allocated on the basis of Modified Total Direct Costs (MTDC) and by type of project (see C-1 above). MTDC is the total of all direct costs less the following exclusions: equipment over \$5,000, capital expenditures, charges for patient care, tuition remission, rental costs of off-site facilities, participant support, scholarships, and fellowships as well as that portion of each sub-grant and subcontract issued in excess of \$25,000.

(The UI calculates on- and off-campus rates for each of the project types defined in C-1 above).

**E-2. F&A space survey.** In addition to the cost study, the University must also complete a space survey, which provides the basis for a more accurate allocation of indirect costs to project types. Cost-benefit considerations do not allow for a survey of all of the buildings in the University system. The survey is focused on units that are likely to have the highest amount of space and overhead devoted to research activities. The survey requires unit coordinators to carry out a number of tasks, the goal of which is to determine functional-use (project type) percentages for all rooms being surveyed. The tasks include, but are not limited to, the following:

- Discovering or confirming room occupants.
- Verifying space measurements.
- Walking through unit space in order to interview principal investigators and other room occupants.
- Entering data related to room occupants, functional use percentages and research accounts for rooms having a research component into WebSpace (Space Survey Tool from Maximus).

After an F&A Study is completed, the calculated rates and supporting documentation are submitted to HHS for review and negotiation. The University negotiates "predetermined" F&A cost rates. These rates are final and not subject to upward or downward adjustment for actual costing experience during the multi-year period for which the rates are in effect. By negotiating a stable F&A cost rate in a multi-year agreement the University avoids the disruptions and costs associated with continual audits and annual negotiations. Rates are typically negotiated for four-year periods, but that does not mean that a given project type will have the same rate for all four years.

**F. Contact information.** For additional information or answers to specific questions please contact the Office of Sponsored Programs at 208-885-6651 or [osp@uidaho.edu](mailto:osp@uidaho.edu).

**G. Related policies**

- [APM 45.02, Sponsored Projects Proposal Preparation and Authorization](#)



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### Faculty Staff Handbook (FSH)

Addition  Revision\*  Deletion\*  Emergency  Minor Amendment

Policy Number & Title:

### Administrative Procedures Manual (APM)

Addition  Revision\*  Deletion\*  Emergency  Minor Amendment

Policy Number & Title: **APM 45.12 Sponsored Project Closeout and Recordkeeping Responsibilities**

\*Note: If revision or deletion, request original document from [ui-policy@uidaho.edu](mailto:ui-policy@uidaho.edu). All changes must be made using "track changes."

**Originator: Sarah Martonick**

**Policy Sponsor, if different from Originator: Chris Nomura, VPRED**

**Reviewed by General Counsel**     Yes  No    Name & Date: Manisha Wilson, 12/29/24

- 1. Policy/Procedure Statement:** Briefly explain the reason for the proposed addition, revision, and/or deletion.  
Reformat to conform to standard APM style, clarify closeout and recordkeeping processes due to shift to electronic record keeping and other system changes.
- 2. Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have?  
None
- 3. Related Policies/Procedures:** Describe other UI policies or procedures related or similar to this proposed change, or that will be impacted by it.  
None
- 4. 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.

## 45.12 – Sponsored Project Closeout and Recordkeeping Responsibilities

December 2018

**A. Purpose.** To identify the responsibilities and processes for completing sponsored project closeouts.

**B. Scope.** This policy applies to all sponsored projects.

**C. Definition of closeout.** Closeout is the process by which all required invoicing and financial accounting and reporting; all technical reporting; and all non-financial/non-technical reporting required by the award is completed.

**D. Policy.** It is the policy of the University to prepare and submit all required closeout documents within the time-frame specified by the terms and conditions of the award document.

~~**A. General.**~~ To ensure proper award termination procedures, the Office of Sponsored Programs (OSP), the unit, and the principal investigator (PI) have each been designated specific responsibilities. Typical regulatory or contractual requirements for sponsored research projects include final technical reports, invoices, financial reports, patent reports, and property reports, ~~which. These reports~~ are usually required to be submitted within 30 ~~to 90~~ 120 days of the project end date. ~~Because of such the requirements are contractual in nature and delinquent reporting can affect the ability of the University to receive future funding,~~ it is important that closeout activities are finalized in a timely manner. ~~[rev. 12-18]~~

~~**B. Policy.**~~ It is the policy of the University to prepare and submit all required closeout documents within the time ~~period specified by the terms and conditions of the award document.~~ **E. Procedure.** Beginning approximately three (3) months prior to the award termination, OSP will provide units ~~and PIs~~ with notifications that serve as reminders of required actions and responsibilities for timely award closeout. ~~Non-compliance with University required actions may result in disallowed expenses.~~ ~~[rev. 12-18]~~

**C. Process/Procedures.** Departmental grant administrators (~~DGADGAs~~) and PIs should work together to review and verify the following to OSP ~~via email; that in written form:~~

- ~~That~~ all accrued expenses have posted to Banner;
- ~~That~~ no expenses incurred after the end date have posted to the award; and
- ~~That~~ all expenses are applicable to the project.

Failure to respond to requests for confirmation of expense review will result in the submission by OSP to the sponsor of a final invoice based on what has posted to the Banner accounting system, net ~~any disallowed expense. A list of expenditures that have posted to the project can be viewed via the Banner report FWRITEM.~~ ~~[rev. 12-18]~~ of any disallowed expenses.

**EE-1. Revised Circumstances/circumstances.** If there are extensions of time ~~required in order to complete the project or increased funding pending, anticipated (i.e. for multi-year projects)~~ the unit shall notify OSP immediately. ~~[rev. 12-18]~~ If extensions of time are being requested from the sponsor, appropriate prior approval processes must be followed. (See APM 45.14).

**EE-2. Expense Changeschanges.** Information on ~~additional known project~~ expenses that have not yet posted to Banner and ~~need that are requested~~ to be included on the final invoice, must be submitted to the OSP Financial Unit by the due date specified in the "notice to final invoice" emailed ~~at award termination.~~ ~~[rev. 12-18]~~ near award termination. This due date is usually a minimum of 15-30

days prior to the due date for final invoicing or financial reporting to allow for sufficient processing time.

**~~EE-3. No Changes-changes Requiredrequired.~~** If there are no corrections, the final invoice and financial report (~~if~~when required) will be prepared from the information available in Banner. The GADGA must verify the accuracy of the Banner numbers to the OSP Financial Unit by the due date specified in the "notice to final invoice" that is emailed at~~near~~ award termination. If there is no response, the invoice and report will be submitted to the granting agency based on the allowable expenses posted into Banner. ~~[ed. 12-18]~~

**~~CE-4. Limited Revised-revised Final-final Invoices-invoices and Reportsreports.~~** If revisions are needed after the final invoice has been submitted to the sponsor, ~~OSP~~the Director of OSP or Assistant Director of Sponsored Accounting will evaluate whether to resubmit the final invoice ~~and~~/or financial report on a case-by-case basis. ~~[rev. 12-18]~~

**~~C-5. Closeout Letter and Statement of PI Responsibility.~~** ~~When an award has terminated and all financial reporting has been completed, a "Closeout Letter and Statement of PI Responsibility" is forwarded to the PI, and the DGA. This letter outlines revision is subject to approval by the final financial numbers submitted and indicates any items pending completion.sponsor.~~

**~~E-5. Recordkeeping responsibilities.~~** For audit purposes, documents relating to the award must be kept for three (~~3~~) years, or longer if specified by the award terms. ~~The audit files maintained by OSP consist at a minimum of the following items: [ed. 12-18]~~

The audit files maintained by OSP consist at a minimum of the following items:

- Original proposal and any additional supplemental proposals.
- Award notices and any amendments.
- Invoices and financial reports.
- Cost sharing records.
- Compensation confirmation (personnel activity~~effort~~ reports or other mechanism) and payroll cost transfer~~labor redistribution~~ records.
- Property/equipment reports and patent reports.
- ~~Subcontract and service agreement~~Subaward documentation.

In addition, the ~~unit~~PI/Unit is required to maintain the following audit information:

- Technical reports (progress and final).
- Supporting documentation for cost transfers, inventory, and all expenditures.
- Miscellaneous correspondence regarding the project(s).

**~~DF. Contact Informationinformation.~~** Any questions regarding closeout procedures for sponsored projects should be addressed to the Office of Sponsored Programs at 208-885-6651 or osp@uidaho.edu. ~~[ed. 12-18]~~osp@uidaho.edu.



## POLICY COVER SHEET

For instructions on policy creation and change, please see <https://sitecore.uidaho.edu/governance/policy>.

All policies must be reviewed, approved, and returned by the policy sponsor, with a cover sheet attached, to [ui-policy@uidaho.edu](mailto:ui-policy@uidaho.edu).

**Faculty Staff Handbook (FSH)**

Addition  Revision\*  Deletion\*  Emergency  Minor Amendment  
Policy Number & Title:

**Administrative Procedures Manual (APM)**

Addition  Revision\*  Deletion\*  Emergency  Minor Amendment  
Policy Number & Title: **APM 45.15 Subawards and Subcontracts**

\*Note: If revision or deletion, request original document from [ui-policy@uidaho.edu](mailto:ui-policy@uidaho.edu). All changes must be made using “track changes.”

**Originator: Sarah Martonick**

**Policy Sponsor, if different from Originator: Chris Nomura,VPRED**

**Reviewed by General Counsel**      Yes  No     Name & Date: Manisha Wilson, 12/29/23

1. **Policy/Procedure Statement:** Briefly explain the reason for the proposed addition, revision, and/or deletion.  
Clarification of the subaward request and issuance process to include new requirements and processes. No substantial changes in responsibilities, monitoring, or timelines. Adding 2 CFR 200 in place of the A-121 and A-133 references, and formatting to standard APM format.
2. **Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have?  
  
None – no substantial changes
3. **Related Policies/Procedures:** Describe other UI policies or procedures related or similar to this proposed change, or that will be impacted by it.  
  
None
4. **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.

## 45.15 – Subawards and Subcontracts

February 14, 2017

**A. General.** ~~This section applies to all~~ **Purpose.** A sponsored project ~~subawards or subcontracts which may be issued~~ include programmatic work being done by ~~the University of Idaho (University) to other~~ qualifying institutions for the purpose of completing some portion of the sponsored project work, ~~entities (subrecipients).~~ These subrecipients are responsible for conducting their portion of the work in conformity with the laws, regulations, and terms and conditions that govern the prime award funding to the University. The University, via its faculty and staff, is responsible for monitoring subrecipients for both programmatic and fiscal compliance. To satisfy federal regulations, all subawards and subcontracts issued, regardless of the funding source, must be managed consistently with this section. ~~[rev. 2-12]~~

Note: For

**B. Scope.** This section applies to all sponsored projects that include subawards and/or subcontracts issued prior to December 26, 2014, by the provisions ~~University of~~ OMB Circular A-133, Audits Idaho to other qualifying institutions for the purpose of ~~States, Local Governments, and Non-Profit Organizations, may apply in lieu of 2 CFR Part 200.~~ ~~[add. 2-17]~~ completing some portion of the work on a sponsored project.

**C.**

### **B=Definitions:**

**BC-1. Subaward/~~Subcontract~~:subcontract.** An ~~award~~ agreement provided by a prime award recipient or a pass-through entity to a subrecipient for the purpose of having the subrecipient to carry out part of the ~~Federal award receive by the pass-through entity~~ programmatic work required under the award. For the purposes of this APM section the term "subaward" will be used to refer to both subawards and subcontracts. ~~[rev. 2-12, 2-17]~~

**BC-2. Subaward ~~Agreement~~:agreement.** A contractual obligation on the part of the subrecipient to perform a portion of the scope of work funded by an outside sponsor. Such agreements not only identify the work to be conducted by the subrecipient, but also provide and establish the applicable laws and regulations, flow-down provisions from the prime award, and any other terms and conditions that the subrecipient must meet. ~~[add. 2-12]~~

**BC-3. Subrecipient:** ~~A non-Federal.~~ An entity that receives a subaward from a pass-through entity to carry out part of a Federal program sponsored project; but does not include an individual that is a beneficiary of such program. Subrecipients may be educational institutions (domestic or foreign), non-profit organizations, ~~or~~ for-profit organizations, and occasionally Federal agencies. Individuals, including those who are beneficiaries of a subaward, are not considered subrecipients. Per federal regulations, individuals are considered vendors and therefore require a different contract mechanism. For assistance with determining the appropriate contract mechanism for a vendor relationship, contact Purchasing Services. ~~[ren. & ed. 2-12, rev. 2-17]~~

**BC-4. Vendor:** A dealer, distributor, merchant, or other seller who provides goods or services to many different purchasers within their normal course of business. ~~Goods and services purchased from a vendor may be used in support of a sponsored project, but are not considered a substantive contribution to the programmatic effort.~~ ~~[ren. & ed. 2-12]~~

**BC-5. Pass-through Entity:** ~~A non-federal~~ entity. An entity that has received funding and that issues a subaward to a subrecipient to carry out a sponsored project. ~~The pass-through entity may be either a primary or a subaward recipient.~~ ~~In functioning as a pass-through entity an institution assumes responsibilities more typically associated with an award sponsor.~~ ~~The University is considered a pass-through entity for each subaward that it issues.~~ ~~[ren. & ed. 2-12, ed. 2-17]~~

**ED. Policy.** ~~A subaward may be issued by the~~The University, acting as either the prime award recipient or a pass-through entity, may issue a subaward to an eligible subrecipient in support of a sponsored project. The scope of work to be carried out by the subrecipient must involve substantive programmatic effort or decision making that is beyond mere analytical work for hire. It must be of such significance to the project that the collaborator at the subrecipient institution will participate in the preparation of results, publication ~~and/~~ or presentation of the project. In most instances the work will be accomplished by the personnel of the subrecipient, and will use the subrecipients' facilities and resources. (See Section ~~DE~~ for additional clarification on the difference between subcontracts and procurement of services). A written subaward agreement shall be used to formalize the relationship between the University ~~as the prime institution or pass-through entity,~~ and the subrecipient. ~~{add. 2-12, ed. 2-17}~~

**ED-1. Federal Requirements.** Federal regulations, 2 CFR Part 200 ~~(effective December 26, 2014),~~ identify the "pass-through entity" as the administrative mechanism by which federal funds awarded to one institution may be distributed to another institution as a subaward. 2 CFR Part 200 requires institutions acting as pass-through entities (e.g. issuing subawards) to assume administrative and monitoring obligations similar to those of a federal agency overseeing the activity of a primary recipient ~~[2 CFR Part 200.331].~~ These responsibilities include, but are not limited to: ~~{ren. & ed. 2-12, ed. 2-17}~~

- ~~conducting~~Conducting risk assessments of potential subrecipients;
- ~~advising~~Advising subrecipients of all applicable federal laws and regulations, and all flow-down terms and conditions from the primary award;
- ~~regularly~~Regularly collecting and reviewing subrecipient technical and fiscal performance reports;
- ~~performing~~Performing on-site visits, as deemed necessary;
- ~~analyzing~~Analyzing audit reports as required by 2 CFR 200 and other such audit reports filed by subrecipients; ~~{rev. 2-17}.~~
- ~~evaluating~~Evaluating any corrective actions proposed by subrecipients in response to audit findings;
- ~~assessing~~Assessing and enforcing sanctions for subrecipients in cases involving the inability or unwillingness to undergo required audits or correct ~~non-~~noncompliant activity.

Defects in either the management of the subaward by the subrecipient or of the administration of the subaward by the pass-through entity may subject the pass-through entity to substantial penalties. ~~{ed. 2-12}~~

#### **~~D.~~ Process/Procedures:**

#### **~~DE.~~ Procedure**

**E-1. Proper Classification of Subawards.** A critical first step in the administration of subawards is the proper classification of the transaction as a subaward (as opposed to another type of procurement action such as a service/consulting agreement or a purchase order) at the proposal stage of a project. ~~Incorrect classification may result in the Principal Investigator (PI) having insufficient funds to successfully complete the proposed scope of work. It may also create significant delays in processing the subaward and may, in rare cases, endanger the viability of the project.~~ ~~{ed. 2-12}~~

At the time funding is first requested from a sponsor the PI has primary responsibility for determining the correct classification of costs associated with services provided by third parties. ~~The Office of Sponsored Programs (OSP) should be contacted with any questions regarding proper classifications of transactions.~~ ~~{ed. 2-12}~~ and will determine the final classification when needed.

The University uses the characteristics outlined in 2 CFR 200 as a starting point when classifying subawards and other procurement transactions. ~~[ren. & ed. 2-12, 2-17]~~

- a. Subawards.** Some of the factors which may result in the University categorizing funds to be issued to a third party as a subaward, and the third party as a subrecipient include, but are not limited to: ~~[ren. & ed. 2-12]~~
- ~~the~~The programmatic involvement of the third party is identified as a separate scope of work, with a separate budget and separate approval by the third party~~;~~.
  - ~~the~~The third party's performance is measured against the objectives of the sponsored project~~;~~.
  - ~~the~~The third party has responsibility for programmatic decision making~~;~~.
  - ~~the~~The third party assumes responsibility for adherence to any applicable program compliance requirements of the sponsor~~;~~and.
  - ~~the~~The third party will use funds to carry out a sponsored project for the University, as opposed to providing goods or services.
- b. Procurement.** Factors that may result in the University categorizing funds to be issued to a third party as a procurement action, and the third party as a vendor, include, but are not limited to: ~~[ren. & ed. 2-12]~~
- ~~the~~The third party provides the goods or services within its normal business operation~~.~~.
  - ~~the~~The third party provides similar goods or services to many different purchasers~~.~~.
  - ~~the~~The third party operates in a competitive environment~~.~~.
  - ~~the~~The third party provides goods or services that are ancillary to the operation of the sponsored project~~.~~.
  - ~~the~~The third party is not subject to the compliance requirements of the sponsor~~.~~.

## **DE-2. Proposal of a Subaward.**~~[ren. & ed. 2-12]~~

- a. Determination of the Need for a Subaward.** The PI is responsible for ~~deciding~~determining whether a subaward or other procurement action is necessary for the success of a University-sponsored project. The PI, with the guidance of OSP, is also initially responsible for determining which funding mechanism and classification is appropriate for the third-party activity proposed ~~(. See Section DE-1 above).~~~~[ren. & ed. 2-12, rev. 2-17].~~
- b. Selection of a Subrecipient.** Selection of a subrecipient by a PI must be based on ~~his or her~~the PI's assessment that the subrecipient ~~has the ability to can~~ perform the required research successfully. This assessment should address the subrecipient's past performance, technical resources, and financial viability and results of previous audits, as well as the reasonableness of the subrecipient's proposed costs for the work to be conducted under the subaward. ~~[ren. 2-12, rev. 2-17]~~

In order to~~To~~ assist the PI in the evaluation of the proposed subrecipient and to facilitate the proposal process, the University requires the subrecipient to provide the following documents prior to submission of the proposal to the prime sponsor~~;~~, or when the need arises after proposal submission. This list is not ~~a~~-comprehensive ~~list~~ and additional documents may be required of the subrecipient by the University prior to proposal submission ~~and/or~~ subaward issuance. ~~[rev. 2-12, 2-17]~~

- Statement of the scope of work to be undertaken by the subrecipient. This scope of work must be approved by the University PI.



- Budget and budget justification. -This must include the direct and indirect costs of the subrecipient, calculated using the subrecipient's approved F&A and fringe benefit rates, and confirming any committed cost sharing. ~~It is~~ subject to ~~the any~~ limitations of the prime sponsor. The budget provided by the subrecipient must be approved by an individual authorized to contractually commit the institutional resources of the subrecipient.
- Letter of support from the subrecipient's institutional official indicating its commitment to perform the scope of work proposed, assuring the accuracy and reasonableness of the budget and any cost share commitment, and agreeing to enter into a subaward; if the proposal is funded. ~~See the Forms section of the OSP website for the University's Letter of Support form. [ed. 2-12]~~
- All sponsor-required representations, certifications, and assurances of compliance (e.g., Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier Covered Transactions, etc.) by the subrecipient institution.
- A subrecipient commitment form ~~documenting may be required to document~~ the subrecipient's eligibility to receive federal funding and compliance with required federal regulations. ~~[add. 2-17]~~
- Additional documentation ~~as~~ required by program sponsor (e.g., certification of cost or pricing data, biosketches of key subrecipient personnel, etc.).

These documents are expected to conform to all sponsor requirements ~~that~~ ~~apply~~ ~~applicable~~ to the University's proposal. -PIs must also ensure that all materials provided by the proposed subrecipient are in the required format. -PIs are encouraged to coordinate with OSP to ensure that the subrecipient materials provided are compliant with University and sponsor guidelines and regulations. -For complex proposals involving multiple subrecipients, each subrecipient must provide the documentation listed above; and each subaward will be evaluated separately, based on the information provided.

The PI must request that the subrecipient submit its proposal documents at least two (2) business days before the PI is required to submit the ~~remainder of the~~ University's proposal to OSP ~~(see D. See E-2-.c.iv-).~~. This will allow both the PI and OSP sufficient time to review the documents and make any required changes before the proposal is due. ~~[rev. 2-12]~~

### **c.) Considerations when incorporating the subrecipient proposal into the University proposal.** ~~[ren. 2-12]~~

**i.) Facilities and ~~Administrative~~ ~~Administrative~~ (F&A) Rates** ~~rates~~ **for Proposals** ~~proposals~~ **including Subawards:** ~~subawards.~~ Proposals including subawards include (at least) two types of F&A costs ~~unless F&A is not an allowable cost~~: Subrecipient F&A costs and University F&A costs. A subrecipient is expected to apply its own federally-negotiated F&A rates and direct-cost ~~bases~~ ~~base~~ in the preparation of its budget, unless a lower rate has been authorized by the subrecipient's institutional official or the F&A rate is limited by the prime sponsor. If the subrecipient has a federally-negotiated rate, a copy of the subrecipient's federally-negotiated F&A rate agreement must be ~~submitted prior to proposing the subaward.~~ ~~[ren. & ed. 2-12, rev. 2-17]~~ ~~provided.~~

If a subrecipient does not have a federally-negotiated F&A rate, the University will not allow F&A costs over the ~~deminimus~~ ~~de minimus~~ 10% MTDC rate prescribed in 2 CFR Part 200.414 ~~to be included within the subrecipient's proposal~~, unless a rate can be negotiated between the subrecipient and the University. The Cost Accounting Unit of OSP is responsible for the negotiation of F&A rates with subrecipients who do not have a federally-negotiated rate. ~~[rev. 2-12, 2-17]~~

Any waiver of University F&A costs associated with a subaward requires the prior approval of the Vice President for Research and Economic Development or delegate pursuant to FSH 5100 J-1 and APM 45.10 D-C. ~~{rev. 2-12}~~

**ii.) Audit Requirements**~~requirements~~ **for Proposals**~~proposals~~ **including Subawards**~~subawards~~. If the proposed subrecipient is subject to 2 CFR 200, it must provide a complete copy of its most recent independent audit used to meet 2 CFR 200 audit requirements, or a link to its audit record at the Federal Audit Clearinghouse, prior to issuance of a subaward. OSP, in accordance with its responsibility for assessing the risk level of the subrecipient, must review the audit and verify that there are no findings that may negatively impact the proposed University award. ~~{ed. 2-17}~~

**iii.) Subaward Conflicts**~~conflicts~~ **of Interest**~~interest~~. The University must ensure that there are no conflicts of interest involved in awarding funding to the subrecipient, and that any situation that could result in a conflict is reported and managed, if appropriate to do so, consistent with FSH 5600, 5650, 6240, and ~~FSH 3170~~3170. In addition to Conflict of Interest as defined in FSH ~~6240~~6240, Conflict of Interest in relation to subrecipients shall also include situations where i) the University PI has ownership or substantial equity in the subrecipient; or ii) the University PI (or a member of his or her family) will receive individual gain from such an arrangement. Subawards shall not be authorized until a disclosure of the potential conflict of interest is filed and a management plan is approved pursuant to FSH 5600, 5650 and 6240. In certain circumstances, investigators for the subrecipient may also be required to submit disclosures of significant financial interests and comply with ~~University policies on and University application of~~ federal regulations for financial conflict of interest. Subrecipient must also certify that ~~they have~~it has a compliant conflict of interest policy under 2 CFR Part 200.112 and for EPA funding, subrecipient must comply with EPA's Conflict of Interest policy and 2 CFR Part 200.318. ~~{ren. & rev. 2-12, 2-17}~~

**iv.) Administrative Review**~~review~~ **of Proposal**~~proposal~~: OSP reviews the University proposal and ensures that all items required ~~offrom~~ the subrecipient are included. It may be necessary for OSP to clarify costs or other items with the University PI or the subrecipient. In order to allow adequate time for administrative review, all proposals must be submitted to OSP no less than four ~~(4)~~ business days prior to the sponsoring agency's formal submission deadline. ~~{ren. & ed. 2-12}~~

**d.) Inclusion of an Unanticipated Subaward**~~unanticipated subaward~~ **after Submission**~~submission~~ **of Proposal**~~proposal~~. In certain ~~cases~~instances, a PI may determine that a subrecipient is necessary to complete the performance of a project ~~for which~~after a proposal has already been submitted ~~or an award received~~. PIs seeking to add a subrecipient to a submitted proposal or awarded project must provide OSP with the information and institutional authorizations normally required of a subaward at the proposal stage. Because such changes to a proposal can affect the scope of work, methodology, ~~and~~or budget for a project, the PI should work through OSP to gain the authorized approval of the sponsor. ~~-See APM 45.14~~. Subawards will not be issued without sponsor approval, unless such approval ~~is~~requirements are expressly waived by the sponsor. ~~{ren. & rev. 2-12, rev. 2-17}~~

**DE-3. Issuance of a Subaward**~~subaward~~. Upon the receipt of a fully ~~executed~~ prime award from the sponsoring agency, the PI and OSP shall collaborate in the preparation of the subaward ~~agreement~~. ~~{ren. 2-12}~~ agreement.

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**a.) ~~Unit Requisition.~~** ~~At the request of the PI, the Unit will prepare a University requisition to encumber the funds, using the expense codes E5171 for funding up to \$25,000, and E5172 for funding greater than \$25,000. This requisition, and the subsequently generated purchase order, will go through the Banner approval process. *[ren. & ed. 2-12]*~~

**b.) ~~Subaward Request Form- initiation.~~** The Subaward Request ~~Form~~ticket, including the relevant attachments, ~~on the OSP website and the approved requisition or purchase order~~ provide OSP with the information necessary for the issuance of a subaward.- The subaward will incorporate the terms and conditions of the prime award, as well as the approved scope of work and budget and any terms and conditions specific to the subaward itself. -If the scope of work ~~and/or~~ budget for the subrecipient changes, ~~that~~ updated information must be provided to OSP. *[ren. & rev. 2-12, rev. 2-17]*

The Subaward Request Formticket may be prepared by the PI or DGA (or delegate) for submission to OSP at any time, but ~~should not be forwarded~~it is recommended that this is done at accounting (index) setup to OSP for issuance until the completed and approved requisition number can be included. *[rev. 2-12]*allow the process to begin in a timely manner.

**eb.) ~~Subaward Review~~review by the Office of Sponsored Programs.** -Once OSP has received the Subaward Request ~~Form and a purchase order has been approved in Banner~~ticket with the necessary attachments and information, OSP will re-verify that the University is entering into an agreement with a qualified and eligible entity, and assess the "risk level" associated with entering into an agreement. *[ren. & rev. 2-12]*

If a subrecipient is subject to audit under 2 CFR 200, it will generally be considered low risk, unless there are unresolved audit findings that might negatively affect its performance under the subaward. ~~Subawards~~Subaward agreements for subrecipients considered to present a moderate or high risk to the University will include terms providing additional scrutiny of the subrecipient over the course of the contract, pursuant to 2 CFR ~~Part~~200.331. For subrecipients determined to be "moderate" risk, this may include periodic invoice reviews and annual desk reviews. Subrecipients considered to be "high risk" will be contractually required to provide vendor receipts and payroll reports along with their invoices and may not be allowed to rebudget without prior written approval from the University. Subaward terms for high-risk subrecipients will also oblige the subrecipient to submit to biannual desk reviews to ensure that funds are expended properly, and other compliance obligations are met. If determined to be appropriate, a change in high-risk status may be granted after two years. Invoice reviews and desk audits are conducted by the OSP Cost Accounting Unit. *[rev. 2-1, 2-17]*

**dc.) ~~Special Considerations.~~considerations.** When dealing with foreign institutions, for-profit entities, and small businesses, additional considerations may need to be addressed by the PI and the OSP Contract Review ~~Officer (CRO)~~Unit (CRU) (or delegate) during the preparation of a subaward. *[ren. & ed. 2-12, rev. 2-17]*

**i.) ~~Foreign Subrecipients.~~subrecipients.** Because some federal statutes, regulations and agency procedures may not apply to foreign subrecipients, special care must be taken to ensure that a subaward with a foreign entity contains all terms and conditions necessary to contractually establish the appropriate obligations of the subrecipient and to provide a mechanism for their enforcement. -As with subawards to domestic entities, any terms and conditions specific to the prime award must be flowed down to the subrecipient.

**ii.) For-Profit Entities—profit entities.** Subawards issued to for-profit entities may include terms and conditions different from, or in addition to, those included in subawards to non-profit entities. Specific cost principles and administrative requirements are necessary when working with for-profit entities. Because some sponsors are prohibited by statute, agency regulations, or organization charter from extending funding support to for-profit entities, the prime recipient of an award may need to obtain the approval of the sponsoring agency prior to any collaboration with a for-profit entity. *[rev. 2-17]* See APM 45.14.

**iii.) Small-Business Subrecipients—business subrecipients.** Issues involved in subawarding to small businesses are often a hybrid of the issues mentioned above. As for-profit entities, subawards for small businesses must contain terms and conditions flowed down from the prime award. However, these entities may not be familiar with federal requirements and thus may require additional information regarding compliance. [This information can be provided by the PI, DGA, or OSP depending on the specific information requested.](#)

**ed.) Subaward Issuance—issuance.** After review, OSP will prepare the subaward agreement and forward it to the subrecipient for review and signature by the subrecipient's authorized official. *[ren. & ed. 2-12]*

**DE-4. Post-Award Stage—issuance.** Once the subaward is in place, the PI and OSP will jointly monitor the activity of the subrecipient to ensure programmatic progress and compliance. -OSP will provide a copy of the executed subaward to the PI and the [Departmental Grants Administrator \(GADGA\)](#) or College Finance Director to facilitate the monitoring process. *[ren. & ed. 2-12, rev. 2-17]*

**a.) Programmatic and Other Monitoring—other monitoring by the PI.** - The University PI bears primary responsibility for monitoring and evaluating the progress of the subrecipient toward fulfilling the programmatic goals and following any required procedures established by the subaward. -This responsibility requires that the PI: *[ren. & ed. 2-12]*

**i.)** Maintain regular contact with the subrecipient [in order so as](#) to verify that the terms and conditions of the subaward are being satisfied. - The PI should have a thorough understanding of the prime and subaward terms and conditions to ensure the subrecipient's adherence to the subaward provisions. -OSP will serve as a primary point of reference for the PI regarding questions on terms and conditions, and will collaborate with the PI in answering subrecipient questions related to the terms and conditions, federal regulations, resolution of disputes, and issues related to breach of contract. *[ren. & ed. 2-12]*

**ii.)** Monitor the substantive progress of the subrecipient by monitoring its progress against the scope of work and any deliverable deadlines included in the subaward. -If programmatic progress is unsatisfactory, or if required technical reports or other deliverables are not produced in a competent and timely manner, the PI must work with OSP to address these issues with the subrecipient, documenting any issues raised and their resolution. -If subrecipient performance continues to be inadequate, the PI must notify OSP, which will formulate remedial actions to be taken by subrecipient or impose sanctions. *[ren. & rev. 2-12]*

**iii.)** Personally review and approve invoices submitted by the subrecipient, indicating that the quantity and quality of work completed for the period covered by the invoice was acceptable, and that it was performed in accordance with any timetable included in the subaward. -By this approval, the PI also affirms that the expenditures for the subrecipient's portion of the project are reasonable, allowable, and allocable as

defined by 2 CFR Part 200 Subpart E. -Entailed in the review of subrecipient invoices is an evaluation of the subrecipient's effort reporting and cost sharing contribution (if such commitments are included in the subaward) and of its application of the appropriate F&A rate. [\[ed. 2-17\]](#)

Note: If a PI is not able to provide review and approval of the invoice in person, via email, fax, or other means of written communication, the PI may provide a written authorization for a person with firsthand knowledge of the technical performance of the subrecipient to sign during the period of unavailability. -Notwithstanding the above, in the event of extraordinary circumstances, such as a dispute in relation to payment, OSP may sign off on and process an invoice for payment. -In such event, OSP shall verify that payment to the subrecipient is warranted based on performance and factual circumstances. [\[ren. & ed. 2-12\]](#)

**iv.)** Verify that any human subject, animal use, biosafety, or other compliance approvals required by the work performed by the subrecipient are properly secured and maintained for the life of the subaward. -If the subrecipient experiences a lapse in such approvals, the subrecipient is responsible for notifying the University. -If the PI obtains knowledge of such lapse, they must notify OSP immediately. [\[ren. & ed. 2-12\]](#)

**v.)** Ascertain whether the scope of work and/or budget for the subaward must be modified in order to allow additional time, funding, etc. -If the PI determines that alteration of the subaward is required, timely notice must be provided to OSP. [\(see D. See E-6, Subaward Modifications\)](#). [\[ren. & ed. 2-12\]](#).

**vi.)** Assist OSP in communicating with the subrecipient concerning any questions that may arise during the performance of the subaward and with audit inquiries. [\[ren. & ed. 2-12\]](#)

Please see FSH 5100-H on obligations of the PI pertaining to the conduct of research supported by sponsored projects. [\[ed. 2-12\]](#)

**b.)** **Fiscal ~~Monitoring~~-monitoring.** Fiscal monitoring of the subaward is a responsibility shared by the PI, [departmental grant or unit administrator \(DGA\)](#), college [or unit](#) finance director, and OSP, with primary responsibility resting with the PI. -Invoices approved and signed by the PI should be submitted to the unit administrator or college finance director for tracking of expenses and cost share. The invoice is then forwarded to OSP for review before being submitted to Accounts Payable. -OSP uses submitted invoices as one means of monitoring compliance with award terms and conditions. [\[ren. & rev. 2-12\]](#)

**c.)** **Compliance ~~Monitoring~~-monitoring.** As a prime recipient and a pass-through entity of federal awards, the University is required to monitor the activities of subrecipients to ensure that their portions of sponsored projects are performed in compliance with federal regulations, 2 CFR 200.501 audit requirements, and the provisions of the award and the subaward. In addition to the ongoing monitoring of subrecipient invoices, OSP regularly reviews subrecipient audit reports and, if necessary, performs desk reviews to ensure compliance. [\[ren. & ed. 2-12, ed. 2-17\]](#)

#### **~~DE~~-5. Corrective ~~Action Plans~~action plans and ~~Sanctions~~sanctions.**

**a.)** **Corrective ~~Action~~action.** If an audit reveals that the subrecipient is not in compliance with federal regulations, audit regulations, or provisions of the subaward, OSP will issue a management decision on the audit findings. If the subrecipient has already taken steps to correct the finding, this will be so noted in the management

decision. The management decision will state whether a finding is sustained, explain the reasons for the conclusion, and identify both the corrective action to be taken by the subrecipient and the timeframe in which this action must be completed. The subrecipient is responsible for developing and implementing measures to correct all audit findings and must submit the corrective action plan to OSP for use when assessing subrecipient conformance with 2 CFR 200 requirements. OSP will approve the proposed action plan and will modify the plan as it deems necessary to rectify the audit finding. The PI and unit will be informed of subrecipient noncompliance and will be asked to assist in monitoring the implementation of the approved corrective action plan by the subrecipient. (See 2 CFR Part 200). ~~[ren. & ed. 2-12, ed. 2-17]~~

**b.) Sanctions.** -OSP may impose sanctions on the subrecipient for its failure to: undergo an audit in keeping with 2 CFR 200 requirements and/or special terms and conditions of the subaward agreement; undertake the performance of the subaward with reasonable diligence in adhering to applicable federal and state regulations and subaward terms and conditions; and/or submit or carry out a corrective action plan. Under such circumstances, OSP may withhold payment, withhold or disallow overhead costs, or suspend the subaward until necessary corrective measures are taken by the subrecipient. If resolution of identified issues does not occur within ~~ninety (90.)~~ days, OSP will notify the subrecipient that it has ~~thirty (30)~~ days to comply or it will be considered ~~to be~~ in breach of the subaward agreement and the agreement will be terminated. ~~[ren. & ed. 2-12, ed. 2-17]~~

**~~DE-6. Subaward Modifications.~~ modifications.** While the terms and conditions of a subaward usually are fixed for the duration of the contract, it may become necessary to modify terms and conditions of the subaward in order to ensure the success of the entire project. ~~Should~~ be it ~~is~~ determined that amendments to the subaward are necessary, the PI must first contact OSP ~~in order~~ to determine whether the University has the authority under the prime award to alter the subaward. - If the University does not have this authority, the PI will need to work with OSP to obtain approval for the proposed subaward modification(s) from the sponsor. -When a modification is required, the PI shall complete and submit a Request for Subaward Amendment ~~Form~~ ticket to OSP. ~~If additional funding is being provided, a Change Order to the existing purchase order must be completed in Banner prior to the modification being completed.~~ -After OSP receives the request form ~~and the change order has been processed in Banner, if required,~~ OSP will prepare an amendment to the subaward, incorporating the approved modifications into the subaward and will send the amendment to the subrecipient. A copy of the subaward amendment will be provided to the unit once it has been fully executed. ~~[ren. & ed. 2-12, ed. 2-17]~~

**~~DE-7. Subaward Closeout.~~ closeout.** A subaward is considered closed when its performance period has come to an end and all of the conditions of the subaward have been fully met. ~~Before a subaward can be closed out the following tasks must be completed:~~ ~~[ren. & rev. 2-12]~~

- An invoice marked as "final" and certifying that all costs were made in accordance with the subaward conditions must be received within the ~~contract~~ contractual deadline.
- Before signing off on the invoice, the PI must verify that any required technical reports have been completed and obtained and that all provisions of the subaward have been fulfilled.
- Any closeout reports required by the prime sponsor (e.g. invention disclosure, property) must be received.
- Disposition of any equipment purchased under the subaward must be finalized. -A determination must be made on whether this equipment may be vested with the subrecipient, or if title remains with the prime sponsor or the University.

Payment of the final invoice may be withheld until all required documents and deliverables have been received and approved. ~~[ed. 2-12]~~

**EF. Contact Information**~~information~~. For questions or requests for additional information please contact the Office of Sponsored Programs at 208-885-6651 or [osp@uidaho.edu](mailto:osp@uidaho.edu). ~~[add. 2-12]~~

**F. Sources of Federal Guidelines:** ~~[ren. & ed. 2-12]~~

### **G. References**

**GF-1.** Federal Acquisition Regulations.

**GF-2.** 2 CFR 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards ~~[rev. & ren. 2-17]~~



## POLICY COVER SHEET

For instructions on policy creation and change, please see  
<https://www.uidaho.edu/governance/policy>

All policies must be reviewed, approved, and returned by the policy sponsor, with a cover sheet attached, to [ui-policy@uidaho.edu](mailto:ui-policy@uidaho.edu).

### Faculty Staff Handbook (FSH)

Addition  Revision\*  Deletion\*  Interim  Minor Amendment

Policy Number & Title:

### Administrative Procedures Manual (APM)

Addition  Revision\*  Deletion\*  Interim  Minor Amendment

Policy Number & Title: **APM 95.21 UNIVERSITY CLOSURES**

\*Note: If revision or deletion, request original document from [ui-policy@uidaho.edu](mailto:ui-policy@uidaho.edu). All changes must be made using “track changes.”

**Originator: Shane Keen**

**Policy Sponsor, if different from Originator: Brian Foisy, 1/12/24**

**Reviewed by General Counsel**      X Yes   No   Name & Date: Patrick Grace, 1/11/24

1.      **Policy/Procedure Statement:** Briefly explain the reason for the proposed addition, revision, and/or deletion.

Comprehensive review. Language clarified throughout.

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

None.

3.      **Related Policies/Procedures:** Describe other UI policies or procedures related or similar to this proposed change, or that will be impacted by it.

None.

4.      **Effective Date:** This policy shall be effective on July 1, or January 1, whichever arrives first after final approval (see FSH 1460 H) unless otherwise specified.

To be effective immediately upon approval.



# 95.21 - University Closures

## A. Rewrote in October 2017

**General Purpose.** ~~This policy describes how the University may close its facilities i~~n the event of a reported emergency or a weather-related emergency, or if an emergency situation appears imminent, ~~the Executive Director of Public Safety & Security, or designee, may make a recommendation to the President, or designated senior officer, for taking the appropriate action. The action could include the cancellation of classes and/or the closure of a university facility.~~

**B. Scope.** This policy ~~eovers~~ applies to all University of Idaho ~~all~~ facilities, sites, and campuses ~~located around the State occupied, or used by, University of Idaho (UI) employees.~~

## CA. Definition of s

**A-1. ~~e~~Essential Personnel** personnel. ~~Essential personnel is defined as~~ UI employees designated by unit administrators to be critical to the continuation of key operations and services in the event of a suspension of operations.

## **A-2 Consideration of Conditions:**

A decision to close a university facility may be based on any, or all, of the following ~~conditions~~ factors:

- a. ~~Weather information gathered from official weather reports and forecasts. In most cases, university facilities will not close for winter conditions unless there is a severe weather event or hazardous conditions.~~
- b. ~~Decisions from city, county, regional, and state agencies.~~
- c. ~~Local police and county sheriff's departments surrounding the affected campuses and facilities.~~
- d. ~~Consultation with UI Office of Public Safety and Security (OPSS) and Facilities Services.~~

**DB. Policy.** When conditions necessitate, a university facility may be closed or its opening delayed. The decision to close or delay opening a university facility is at the discretion of the President, or designee. In the event of a university closure, only designated essential personnel will be allowed to remain on campus, or occupy a closed university facility.

**DB-1. Supervisor Jurisdiction** jurisdiction. Individual units do not have independent authority to make decisions concerning university-University facility closures, postponements, ~~and~~ or cancellations; however, supervisors do have the authority to approve requests from employees who wish request absence or early release with the use of annual leave or comp time (if applicable) from work due to severe weather conditions. (See FSH 3470.)

**DB-2. Administrative Emergency Closure Leave** ~~leave~~ with Paypay. When the President, or designee, makes a decision to close, cancel classes, or postpone opening any ~~university~~ University facility, ~~administrative emergency closure~~ leave for the affected employees (~~non-essential personnel~~) will be determined pursuant to FSH 3470 and 3710 as applicable.

**DB-3. Locations other than Moscow.** ~~Subject to the provisions of B-5 herein~~ At locations other than Moscow, ~~the location executive officer,~~ or designee, will make a recommendation, to the President, or designee, to close the facility(s). After approval, the executive officer, or designee, will contact UI Office of Public Safety and Security (OPSS) OPSS and provide information on the nature of the event, affected locations, recommended actions (closure, delayed opening), duration of action, and any other relevant details.

**a. Coeur d'Alene (CDA) campus.** University of Idaho CDA facilities may be closed due to a North Idaho College (NIC) closure. In the event of a NIC closure, the CDA executive officer or designee will notify the President or designee and OPSS.

**b. Idaho Falls (IF) campus.** University of Idaho IF facilities may be closed due to an ISU-Idaho Falls (ISU) closure. In the event of an ISU closure, the Idaho Falls executive officer or designee will notify the President or designee and OPSS.

**c. Co-located UI offices.** University of Idaho offices co-located with federal, state, or county offices may be closed due to a building closure. In the event of a closure, the UI executive officer at the co-located facility or designee will notify the President or designee and OPSS.

**DB-4 Consideration of Conditions:**

A decision to close a ~~u~~University facility may be based on any, or all, of the following factors:

**a.** Weather information gathered from official weather reports and forecasts. In most cases, ~~u~~University facilities will not close for winter conditions unless there is a severe weather event or hazardous conditions.

**b.** Relevant guidance ~~Decisions~~ from city, county, regional, and ~~ageneies~~ authorities.

**c.** Advice from local police and county sheriff's departments surrounding the affected campuses and facilities.

**d.** Consultation with UI Office of Public Safety and Security (OPSS) and Facilities Services.

**Exceptions:**

~~**a. Coeur d'Alene (CDA) Campus.** University of Idaho CDA facilities may be closed due to a North Idaho College (NIC) closure. In the event of a NIC closure, the CDA executive officer, or designee, will notify the President, or designee, and PSS.~~

~~**b. Idaho Falls (IF) Campus.** University of IF facilities may be closed due to an ISU Idaho Falls (ISU) closure. In the event of an ISU closure, the Idaho Falls executive officer, or designee, will notify the President, or designee, and PSS.~~

~~**c. Co-located UI Offices.** University of Idaho offices co-located with federal, state, or county offices may be closed due to a building closure. In the event of a closure, the UI executive officer at the co-located facility, or designee, will notify the President, or designee, and PSS.~~

**DB-54. Alerts and Notifications**~~notifications.~~ In the event of a decision to close any university facility, ~~faculty, staff,~~employees and students will be notified of the closure by the ~~university's~~University's ~~emergency alert~~Vandal Alert Notification Ssystem. Additional information related to the emergency and facility closure updates, leave information, and contact information, will be posted on the ~~university's~~University's home page. (<http://www.uidaho.edu/>).