



All Chair/Program Director Meeting

February 23, 2024



Welcome and Overview



→ Meeting Agenda

- ◆ Important Dates
- ◆ Discussion Topics
 - ISUPP 3000 (Professional Workplace Free from Abusive Conduct)
 - Course modality changes after enrollment
 - Best practices for annual evaluations
 - Transfer survey
 - Budget update
 - Canvas transition
 - ISU Book Bundle information
 - ISUPP 4090 (Workload)

Important Dates

- **February 26, 2024:**
 - All college edits/approvals for 2024/2025 Undergraduate and Graduate catalogs.
- **March 22, 2024**
 - 2024/2025 Online Undergraduate and Graduate Catalog available.
 - Evaluations for all department chairs and all full-time faculty, third-year and beyond, are due via TMS to AA.
 - Third-Year Reviews for tenure-track faculty are due via TMS along with annual evaluation ranking.
 - Five-Year Periodic Performance Review (5YfPPR) recommendations for tenured faculty are due via TMS with annual evaluation ranking.
- **April 1, 2024**
 - General Education Objective Review Committee Reports for Objectives 3 and 4 are due to GERC.



NEW POLICY ISUPP 3000: Professional Workplace Free from Abusive Conduct

Katie Thomas
Associate Vice President for Human Resources

[Link to ISUPP 3000](#)

Why was this policy developed?

- Commitment to create a work environment in alignment with our values
- Set expectations and establish definitions for terms such as professionalism and abusive conduct (and related terms bullying, threatening, intimidating, humiliation)
 - And establish a threshold for abusive conduct based on a reasonable person standard
- Establish shared responsibility related to building and maintaining a professional workplace free from abusive conduct
 - Outline roles/responsibilities for employees, supervisors, HR, leadership/administration related to addressing conflict and abusive conduct
- Outline options and procedures for reporting and addressing concerns (informally and formally)

Behavior Policies?

What this policy is:

- Establishing a threshold for what constitutes “abusive conduct”
- Setting expectation that abusive conduct will not be tolerated
- Consistent terminology
- Clarify areas/processes that have been confusing or unclear
 - Employee/supervisor/HR roles
 - Processes for pursuing resolution
 - Alignment with academic freedom and responsibility
 - Privacy/confidentiality

What this policy is NOT:

- An effort to micromanage behavior
- An expectation that employees are happy, smiling, or in agreement all the time
- An all-exhaustive list of all behaviors
 - Reasonable person standard
- Regulation of protected speech or academic freedom
- To be weaponized/retaliatory - concerns in good faith please
- Policy governing sexual harassment or protected class discrimination, harassment, hostile workplace (ISUPP 3100)

How was this policy developed?

- Review of similar-type policies and procedures for other higher ed institutions
- HR/Policy drafted initial draft policy based on best practice
- Technical Working Group comprised of: HR, AA, Faculty Senate, Faculty, President's Office, Grad Student, and Staff Council
 - Broad representation
 - Iterative process - Fall 2023

What are some important aspects?

- Everyone has roles/responsibilities for our work environment
 - Employee
 - Supervisors/leadership
 - HR/Academic Affairs
- Supervisors have a right to manage
- Conflict and disagreements can (and will!) still occur; but should be handled professionally and respectfully
- Does not limit employees' rights to express concerns with employment-related matters

What are some important aspects?

- Informal resolution first (communication is important)!
 - Unit level (with person, with supervisor, etc.)
 - Support from Ombuds
 - Informal resolution through HR
- Formal complaint process - to determine if policy was violated
- Privacy vs. confidentiality (anonymous reporting)
- Academic freedom and responsibility ([ISUPP 4040](#))

Policy Rollout - What's Next

- Sharing high level info - LC, FS, others
- Process flowchart development
- HR “formal complaint” form
 - Online form, but can also intake through phone/email
- Website with info, resources, FAQs
 - Academic Affairs develop guidance regarding this policy and academic freedom

Policy Rollout - What's Next

- HR/Academic Affairs developing workshop about new policy for:
 - Employees
 - Supervisors (academic and non-academic)
- Develop future training/workshops for campus community to support skill development for difficult conversations and conflict resolution

What do you think?

- Do the following constitute “Abusive Conduct” as defined by this policy?
 - A colleague tells me one time that I’m unproductive and my research focus is a dead end - I’m offended, hurt, and feel unvalued
 - A colleague tells me every week for a year that I am unproductive, and my research is a waste of time. They bring this up repeatedly and make fun of me in meetings, harass me via email, and actively try to prevent others from collaborating with me because my “research focus is a dead end”
 - Three years ago, my colleague repeatedly threatened to remove me from a committee if I didn’t include them on a project I was leading
 - A colleague made an inappropriate joke about my race/religion/gender
 - A colleague frequently makes comments about my race/religion/gender

Course Modality Changes After Enrollment

Karen Appleby

Vice Provost for Faculty Success and Instruction

When is this Used?

Rare circumstance when a faculty member needs to make a change from an in-person, face-to-face course modality to an online/synchronous modality **AFTER** students have enrolled.

What is the Process?

- ◆ The *INSTRUCTOR* communicates the need and rationale for the change to the department chair/program director and dean of the academic unit;
- ◆ The *INSTRUCTOR* initiates process by using the [Course Modality Change Form \(PowerForm link\)](#);
- ◆ Once the form is signed and approved by all parties, it is cc'd to the Provost, the Registrar, and all parties who have signed the form;
- ◆ The *REGISTRAR* will then initiate the schedule change process by forwarding the signed and approved form to the University Scheduler;
- ◆ Once completed, the *UNIVERSITY SCHEDULER* will communicate to the impacted department that the schedule change has been made;
- ◆ Once the *INSTRUCTOR* receives this confirmation, ***it is the instructor's responsibility to contact all students registered for the course and inform them of the modality change*** (see suggested language for this communication below).

Best Practices for Annual Evaluations

Karen Appleby
Vice Provost for Faculty Success and Instruction

Transfer Survey for Deans, Associate Deans, Chairs, and Directors

Janna Graham
Assistant Vice Provost

[Link to Survey](#)

University Budget Update

Jen Steele
Vice President for Finance



All Chairs
Budget Discussion

February 23, 2024



Idaho State University

Central University Fund Salary Savings

Acct	Title	Five-Year Average		FY2024 Hiring Pause			
				Adopted Budget	YE Estimate*	FY2024 Savings Estimate	
6101	Faculty Salaries	3,589,282	9%	41,059,014	37,466,500	3,592,514	9%
6102	Professional Salaries	1,353,101	5%	31,712,248	28,029,600	3,682,648	12%
6103	Classified Salaries	833,642	6%	15,290,611	13,399,000	1,891,611	12%
		5,776,025	7%	88,061,873	78,895,100	9,166,773	10%
	Other Salary and Wages	368,504	3%	5,596,327	6,054,600	(458,273)	-8%
Total Salary and Wages		6,144,529	7%	93,658,200	84,949,700	8,708,500	9%
By Division							
	President	623,528	7%	8,930,324	8,179,500	750,824	8%
	KDHS	823,730	6%	16,023,624	14,691,100	1,332,524	8%
	Academic Affairs	2,131,790	5%	43,047,503	39,393,300	3,654,203	8%
	Research	233,259	8%	2,776,943	2,531,200	245,743	9%
	Finance ⁿ	359,666	10%	3,734,277	3,209,400	524,877	14%
	Student Affairs	1,528,635	19%	7,545,774	6,572,800	972,974	13%
	Advancement ^e	(109,471)	####	1,333,434	1,030,000	303,434	23%
	Campus Operations	553,392	7%	10,266,321	9,342,400	923,921	9%
Total All Divisions		6,144,529	7%	93,658,200	84,949,700	8,708,500	9%

*YE Estimate based on actual expenditures and encumbrances. This estimate will be updated monthly.

[Detailed Report](#)

Employee FTE Trends

Central University Fund Employee FTE

Employee Type	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	#Δ	%Δ
Classified/Hourly	392.7	396.5	389.9	379.8	387.4	388.2	361.7	344.9	343.8	(48.9)	-12.5%
Non-Classified/Salaried	272.1	298.4	315.4	316.4	321.1	315.6	307.8	331.5	337.2	65.1	23.9%
Administrator	30.5	30.5	34.2	32.8	33.4	36.5	33.2	31.0	30.7	0.2	0.7%
Contracted Staff	695.3	725.4	739.5	729.0	741.9	740.3	702.7	707.4	711.7	16.4	2.4%
Temp	36.7	42.2	40.7	30.2	26.5	22.3	19.5	18.3	21.5	(15.2)	-41.4%
Student	160.1	184.1	195.5	184.5	180.7	169.5	153.3	142.8	143.6	(16.5)	-10.3%
Staff Total	892.1	951.7	975.7	943.7	949.1	932.1	875.5	868.5	876.8	(15.3)	-1.7%
Contracted Faculty	358.6	360.2	371.3	366.1	376.7	382.3	367.8	360.9	360.8	2.2	0.6%
Adjunct Faculty	61.0	59.4	61.6	51.6	50.2	45.4	42.5	48.9	51.4	(9.6)	-15.7%
Resident	-	0.3	1.0	-	-	-	-	-	-	-	0.0%
Graduate	65.8	62.4	73.8	78.3	72.2	74.6	73.9	82.2	82.0	16.2	24.6%
Faculty, GA, Resident											
Total	485.4	482.3	507.7	496.0	499.1	502.3	484.2	492.0	494.2	8.8	1.8%
Total All	1,377.5	1,434.0	1,483.4	1,439.7	1,448.2	1,434.4	1,359.7	1,360.5	1,371.0	(6.5)	-0.5%

Fall Student FTE <-> EC*	9,696	9,392	9,053	8,758	8,583	8,380	8,193	8,063	7,977	-1,719	-17.70%
Fall Student H/C <-> EC*	12,254	11,295	10,767	10,406	9,731	9,474	9,270	9,248	9,219	-3,035	-24.80%

Source: Banner NHIDST: Actual hours paid

* Student Headcount and FTE from audited financial statements. Source: IR

Next Steps:

University Administration Budget Optimization Initiative

- FS Discussion (Monday)
- Define Administrator
- Expand all data sets back to FY2010 when Banner was implemented
- Benchmarking Data

FTE and Salary Trends

Idaho State University Central University Fund Employee FTE and Wages: FY2015 to FY2023

Employee Type	FY2015			FY2023			%Δ
	FTE	Wages	Wages/FTE	FTE	Wages	Wages/FTE	Wages/FTE
Classified	392.7	12,246,175	31,185	343.8	13,448,188	39,116	25%
Non-Classified <> Administrator	272.1	15,606,849	57,357	337.2	24,557,501	72,828	27%
Administrator	30.5	4,797,414	157,292	30.7	5,444,094	177,332	13%
Contracted Faculty	358.6	31,636,683	88,223	360.8	39,678,137	109,973	25%

FTE and wages are based on actual hours worked and paid during the fiscal year.

The Administrator classification, as tracked by the Idaho State Board of Education, includes the President, Vice President, Associate and Assistant Vice Presidents, Provost, Vice Provosts, Legal Council, Deans, and Executive Director.

Source: ISU Budget Office

Next Steps:

University Administration Budget Optimization Initiative

- FS Discussion (Monday)
- Define Administrator
- Expand all data sets back to FY2010 when Banner was implemented; populate wage data for each year
- Benchmarking Data

OUTCOMES

BALANCED BUDGET
STRATEGIC, AGILE AND DATA-INFORMED RESOURCE
ALLOCATION

BUILDING BLOCKS

- GROWING ENROLLMENT AND NET TUITION REVENUE
- DEVELOPING DATA SETS FOR DECISION SUPPORT
- WORKING THROUGH STRATEGIC BUDGET OPTIMIZATION PROJECTS
- INCREASING EFFICIENCY THROUGH RESTRUCTURING AND REORGANIZATION
- THOUGHTFULLY REDUCING EXPENDITURE BUDGETS TO ALIGN WITH UNIVERSITY RESOURCES

- FOSTERING A CULTURE OF TRUST, COMPASSION, STABILITY AND HOPE
- DEVELOPING SYSTEMS AND REPORTS THAT PROVIDE CLARITY AND A DEPTH OF UNDERSTANDING OF OUR FINANCIAL TRENDS AND OUTLOOK
- ESTABLISHING AN EFFECTIVE GOVERNANCE STRUCTURE THROUGH THE BUDGET ADVISORY GROUP
- DEVELOPING PRINCIPLES THAT GUIDE OUR WORK
- DEVELOPING A COMPREHENSIVE BUDGET MODEL FRAMEWORK

FOUNDATIONS

Goal: Balanced Central University Budget by FY2027

\$6.5M deficit reduction FY2025; Additional \$6.5M FY2026

PLUS

Sustained enrollment and moderate tuition rate increases

Budget Advisory Group Process

Identify options and opportunities for achieving reduction goals

Analyze data, meet with subject matter experts

Meet with stakeholder groups and units across the university to discuss options, ideas, and impacts

Budget Optimization Projects

Centralized Salary Savings

Revenue Enhancing Investments

Increased Administrative Recovery Rates

Expense Reduction Goals by Division

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What and Why:

Strategic initiatives focused on 1) sustainable and scalable revenue growth, and 2) expenditure reduction through efficiencies and shared service models.

Development and Implementation/Campus Community Role:

We need all stakeholders to contribute to these efforts through engagement, dialogue, analysis, and feedback.

FY2025 Impact: \$650K. Additional impact in future years.

Budget Optimization Initiative Projects

Completed

Early College
Transfers & Subsidies

In Process

Online Program Fees
Purchasing
Student Activity Fees
Administrative & Service Unit Allocation
Benchmarking
Scholarship Practices
Transportation and Motor Pool
Non-Academic Revenue Growth
Academic Program Growth
Technology
Continuing Education
Administrative Support Services
Marketing & Communications

Coming Soon

University Events
University Administration

What and Why:

Hold salary savings in central university funds in a salary savings pool. This will generate a recurring expense offset while creating a more dynamic and strategic approach to deploying resources as needed across the university. Increase transparency by budgeting expenditures according to established plans, priorities, and criteria.

Development and Implementation:

Work individually with each unit to understand impacts and make necessary adjustments to base budgets

Create central pools for one-time needs, market/equity/retention funds, vacation payouts, and moving expenses.

Design efficient processes for budget adjustments to support enrollment and other needs resulting from mid-year vacancies

Develop clear, transparent, and equitable process for faculty and staff position approvals. Continue to develop reports and analyses to support and inform personnel decisions.

Campus Community Role:

- Work with your business officer and unit leads to analyze how centralization of salary savings impacts your activities and operations. Let the Budget Office know of any questions or concerns.
- Contribute to conversations about decision processes and structures.
- Think expansively and creatively about position planning in alignment with your department/unit's plans and needs
- Engage in data analysis with your team.

FY2025 Net Impact: \$3.7M (ongoing)

What and Why:

Create a clear, consistent structure and process for revenue enhancing investments to support adaptation and growth of new revenue streams that is available to all units.

Development and Implementation:

Develop processes, templates, documentation, and resources for units

Provide support to units developing proposals

Campus Community Role:

Discuss ideas for revenue generation with your team and unit leadership.

Fiscal Impact TBD

Administrative Recovery Rates

What and Why:

1/2% increase to administrative recovery rates to reflect significantly increased costs in overhead and administrative expenses. Average impact by college/unit: \$6,189/year.

Development and Implementation:

Work with each unit to understand impact and ensure it does not impact local or auxiliary success.

Campus Community Role:

Work with your business officer and unit leads to analyze how this increase impacts your operations.

FY2025 impact: \$230K (ongoing)

What and Why:

Assign expenditure reduction goals by division based on percent of central university budget with the understanding that the deficit cannot be solved through revenue growth alone. Assigning deficit reduction goals by division rather than unit provides a larger canvas for assessing needs and opportunities.

Implementation:

Vice Presidents will develop a process and criteria for identifying reductions for FY2025 through an inclusive process with stakeholders.

Campus Community Role:

Please actively contribute to these efforts through engagement, dialogue, analysis and feedback.

FY2025 Impact: \$2M (ongoing). Additional reductions will be needed in FY2026.

Expenditure Reductions

Division	Central University Budget	% of Budget	Reduction Goal	Current Vacancies (12.31.23)
Academic Affairs & KDHS <i>All colleges, Academic Affairs, KDHS</i>	\$81.68M	56.3%	\$1,126,000	\$7,184,579
Campus Operations <i>Facilities Services, Events, EHSS, Public Safety, Transportation, Human Resources</i>	\$20.14M	13.9%	\$278,000	\$1,147,221
Student Affairs <i>Enrollment Management, Disability Services, Counseling, Career Center, Auxiliary Services, Equity & Inclusion, Advising</i>	\$13.33M	9.2%	\$184,000	\$677,824
President <i>President's Office, Marketing and Communications, Legal, Information Technology</i>	\$12.22M	8.4%	\$169,000	\$528,825
Finance <i>Budget Office, Student Accounts, Accounts Payable, Travel, Financial Reporting, UBO organization</i>	\$6.16M	4.3%	\$86,000	\$276,433
Research <i>Research, Sponsored Programs, Economic Development</i>	\$4.96M	3.4%	\$68,000	\$462,964
Athletics	\$4.59M	3.2%	\$63,000	\$64,723
Advancement	\$1.95M	1.3%	\$26,000	\$267,399
Total	\$145.04M	100%	\$2,000,000	\$10,609,968

FY2025 Proposed Tuition and Fees

	FT				Current UI	UI+5%
	Current	\$ Inc.	% Inc.	Proposed		
Undergraduate	4,178	211	5.0%	4,389	UGR	4,198 4,408
Undergraduate Non-Resident	13,733	211	1.5%	13,944	UGNR	13,816 14,507
Graduate	5,634	211	3.7%	5,845	GRR	4,984 5,233
Graduate Non-Resident	15,076	324	2.1%	15,400	GRNR	14,602 15,332
Consolidated Mandatory Fee (included in above totals)						
Student Enrollment, Engagement, Success	27.16	0.22	0.8%	27.38	Current BSU	BSU+5%
Student Health & Wellness	171.44	10.93	6.4%	182.37	UGR	4,391 4,611
Inst. Operations, Svcs, Support	912.31	59.22	6.5%	971.53	UGNR	13,488 14,162
Student Government	70.97	0.53	0.7%	71.50	GRR	5,243 5,505
Total	1,181.88	70.90	6.0%	1,252.78	GRNR	14,303 15,018

Next Steps:

- SBOE Guidance
- Professional Fees
- Public Hearings – March 13 & 14
- SBOE Approval - April

- ISU is in a strong financial position but needs to fix the structural deficit in central university funds.
- This is the hard work we've been discussing since January. It is designed to support our budget principles and continued growth and progress while also solving our deficit.
- We have more work ahead of us to achieve FY2026 deficit reduction goals.
- We can and will be successful in this due to the foundations we have built and are continuing to build.
- It requires trust in each other and in our processes to move to a more dynamic, data-informed budget environment. We need everyone to lean into the work.

Discussion, Q&A



Canvas Transition Update

Adam Bradford

Interim Provost and Vice President for Academic Affairs

Karen Appleby

Vice Provost for Faculty Success and Instruction

ISU Book Bundle Update

Emma Watts
ASISU President

Janna Graham
Assistant Vice Provost

ISUPP 4090: Workload Policy

Adam Bradford
Interim Provost and Vice President for Academic Affairs

[Link to ISUPP 4090](#)

Questions and Further Discussion

