

University of Idaho  
2025 – 2026 Faculty Senate Agenda

Meeting #28

Tuesday, April 14, 2026, at 3:30 pm  
Zoom Only

- I. Call to Order
- II. Approval of Minutes (VOTE)
  - Minutes of the 2025-2026 Faculty Senate Meeting # 27 (April 7, 2026) **Attach. #1.**
- III. Chair’s Report
- IV. Provost’s Report
- V. Invited Guest Presentations
  - Strategic Plan Update, Pillar 3 – Andrew Fields, Pillar Champion for Pillar 3.
  - Strategic Plan Update, Pillar 4 – Dennis Becker, Pillar Champion for Pillar 4.
- VI. Committee Voting Items and Reports
  - Commencement Committee Report – Jylisa Kenyon, Committee Chair.
  - Faculty Affairs Committee Report – Bob Borelli, Committee Chair.
  - FSH 3720 Sabbatical Leave – Dan Hickman, Chair of Sabbatical Committee, and Barb Kirchmeier, Member of Ad hoc Committee on NTT Faculty. **Attach. #2**
  - UCC 185 E-Grades – Lindsey Brown, Registrar. **Attach. #3**
- VII. Other Policy Business
  - APM 40.03 New and Major Renovation Building Policy – Ray Pankopf, Director of AES. **Attach. #4**
  - APM 40.10 University Space – Ray Pankopf, Director of AES. **Attach. #5**
  - APM 40.12 Sustainability Revolving Loan Fund – Ray Pankopf, Director of AES. **Attach. #6**
  - APM Chapter 60 Updates – Robert Akhnoukh, Director of Contracts and Purchasing Services. **Attach. #7**
- VIII. Other Announcements and Communications
  - None
- IX. New Concerns or Issues

X. Adjournment

Attachments

- **Attach. #1** Minutes of the 2025-2026 Faculty Senate Meeting # 27 (April 7, 2026)
- **Attach. #2** FSH 3720 Cover Sheet and Redline
- **Attach. #3** UCC 185
- **Attach. #4** APM 40.03 Cover Sheet and Redline
- **Attach. #5** APM 40.10 Cover Sheet and Redline
- **Attach. #6** APM 40.12 Cover Sheet and Redline
- **Attach. #7** APM 60 Cover Sheet and Redlines

**2025 – 2026 Faculty Senate – Pending Approval**

Meeting # 27

Tuesday, April 7, 2026, 3:30 pm – 5:00 pm PST

Zoom only

**Present:** Bailey, Barannyk, Borrelli, Erickson, Hagen, Haltinner (vice chair), Harrison, Hu, Kenyon, Kolas, Lawrence (provost, w/o vote), Long, Maas, McKenna, Murphy (chair), Remy, Rinker, Rivera, Roe, Shook, Stuen, Thorne, Tohaneanu, Vella (faculty secretary, w/o vote)

**Absent:** Miller, Strickland, Victoravich (excused)

**Call to Order**

Chair Murphy called the meeting to order at 3:30 p.m.

**Approval of Minutes (vote)**

- The minutes of the 2025-2026 Faculty Senate Meeting #26 (March 31, 2026) were approved as circulated.

**Chair's report**

- Senate voting procedures include a mechanism for calling for a count of the vote called a motion for division of the assembly. A senator can make a motion for division of the assembly. Once the motion is made, we would call for a hand count to recount the vote. The motion is not debatable and does not require a second.
- Three meetings remain for the 2025-2026 Senate session. The final meeting of the 2025-2026 Senate will be on April 28, 2026 and this is expected to be about half of a meeting. The second half of the meeting will be the first meeting of the 2026-2027 Senate session to call for nominations for vice chair and confirm chair. The second meeting will be held on May 5, 2026, after UFM, to vote for vice chair.

**Provost's Report**

- The two ongoing campus searches—the Law Dean and Interim Provost—are expected to conclude within the next three weeks, with interviews underway and finalists to be announced soon.
- Vandal Giving day is April 7 and 8, 2026. Each year we've set a new record for fundraising and this year a high number of donors have provided matching funding [uidaho.edu/VandalGivingDay](http://uidaho.edu/VandalGivingDay)
- The final Faculty Gathering will be hosted by the School of Health and Medical Professions, Wednesday, April 8, 2026 from 4:30-6:30 pm PT in the D.A. Huckabay Medical Education Building (121 W. Sweet Ave).

**Committee Voting Items and Reports**

- Report from Information Technology Committee – Margie Pinnell, Committee Chair  
Margie provided an overview of the accomplishments of the IT committee. The committee finalized a report and executive summary on centralized IT procurement, related to APM 30.16. The committee is now working on understanding proctoring needs across campus and looking into proctoring software for various situations.

- Report from Administrative Hearing Board – Debb Thorne, Board Chair.  
The committee receives most requests from students seeking partial or full tuition refunds due to missed deadlines or residency issues. This year, 47 petitions were reviewed, with most granted partially or in full. An issue was noted with UI Bound students who register in the spring but later choose to attend another institution in the fall; if they do not withdraw from classes, tuition charges are incurred.

- P&T Salary Increase Recommendation – Brenda Bauges, Chair of Faculty Compensation Committee.  
The Faculty Compensation Committee (FCC) recommended increasing promotion and tenure increments effective with 2025-2026 promotion and tenure decisions, and reviewing increments every three years thereafter to account for inflation. Given there is no CEC this year, the money would come from general education funds or other funds at the university (e.g., individual colleges).

Discussion:

Senators asked about the total budget impact of the proposed changes, including whether the amount includes increases for instructors. Discussion noted that salary compression is most significant at the full professor level and that implementing the recommendation would require identifying other areas to reduce funding. In past years, promotion increases were funded through the CEC, and a question was asked whether the committee considered what would not be funded to support this recommendation. Concerns were raised that the change could further exacerbate compression at the full professor level and impact raises for faculty and staff not receiving promotion increases.

Haltinner made a motion, Thorne seconded, to change the first paragraph in the Specific Recommendations section to read: The FCC recommends that the University of Idaho increase its P&T increments **from \$2500 to \$3750 for Instructors being promoted to Senior Instructor**, \$6,000 to \$9,000 for Assistant Professors being promoted to Associate Professor, and from \$8,500 to \$12,000 for Associate Professors being promoted to Full Professor. These numbers are specifically for those professors on an academic year contract, regardless of tenure-track Status. Vote on amendment: 21/22 yes. 1/22 no. Approved.

The chair called for a vote on the recommendation as amended.  
Vote: 18/20 yes. 2/20 no. Approved.

- Ad Hoc Committee on AI Use in the Classroom Roster Recommendation – Kristin Haltinner, Chair of Committee on Committees.  
Kristin provided an overview of the committee recommendations from the Committee on Committees.

Discussion:

Concern was raised that not all colleges are represented on the committee; however, it was noted that the committee has only seven seats and can seek feedback from the broader campus community as needed.

Bailey motioned to approve the committee with added ex officio members from Dean of Students and Academic Support Services; Thorne seconded.  
Vote: 15/19 yes, 4/19 no, Approved

**Adjournment**

The meeting was adjourned at 4:31 p.m. PST (5:31 p.m. MT).

Respectfully Submitted,

Chantal Vella

Secretary of the University Faculty & Secretary to Faculty Senate



## 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:

\*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:** Chantal Vella, Chair Sabbatical Leave Evaluation Committee; Barb Kirchmeier, Ad Hoc Committee on NTT Faculty

**Policy sponsor, if different from originator:**

**Reviewed by General Counsel:** \_\_Yes  No Name & Date:

**Comprehensive review?**  Yes \_\_No

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

Changes were made to clarify language about the sabbatical application, schedule for applying, position description, and return from sabbatical. Changes were made to the rating system total points to streamline the application review process.

In light of changes to the state board policy on sabbaticals, we have also made a change to sabbatical eligibility. This will allow any faculty member who has served at UI at least 6 years to apply.

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

# UI FACULTY-STAFF HANDBOOK

## CHAPTER THREE:

### EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF

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#### 3720 SABBATICAL

**LAST REVISION:** July 2019

#### CONTENTS:

~~A. General Policy~~

~~A. B. Purpose~~

~~B. Scope~~

~~C. General Policy~~

~~D. Period of Sabbatical and Restrictions on Service and Salary~~

~~DE. Application for Sabbatical Status~~

~~EF. Criteria and Rating System Used in Evaluating Applications~~

~~FG. Schedule for Applying~~

~~GH. Position Description and Annual Performance Evaluation~~

~~HJ. Changes in or Cancellation of Sabbatical~~

~~I.J. Return~~

~~**A. PURPOSE.** Sabbaticals are designed to encourage scientific inquiry, research, artistic creation, clinical/technical expertise, innovation in teaching or to acquire professional skills or training.~~

~~**B. SCOPE.** This policy applies to full-time UI faculty members who have completed six years of full-time employment at the University of Idaho. This policy applies to all UI tenure track faculty~~

~~**CA. GENERAL POLICY.** Members of the UI faculty [see 1520 II-1] having completed six years of full-time employment at the University of Idaho ~~who are tenured by the time the sabbatical is to be effective~~ may be granted sabbatical. ~~A faculty member who is untenured, but expects a tenure decision by the time the sabbatical is to be taken, may submit an application.~~ Tenured ~~F~~faculty may apply for additional sabbaticals provided that six full academic years have elapsed since the end of the most recent sabbatical and the beginning of the requested sabbatical.~~

**A-1. Sabbatical Status.** Employees in sabbatical status (longer than six months) retain all regular employment benefits except short term and long term disability. Faculty are advised to contact Benefit Services in HR to discuss how a sabbatical may impact their benefits.

**A-2. Fiscal Year Cross-over.** In addition, in the event a sabbatical will cross over to a new fiscal year, the faculty member is strongly advised to discuss whether, and what impact, the sabbatical may have on salary.

**A-3. Cooperative Extension System.** Sabbatical applications by faculty members in the Cooperative Extension System (CES) are processed separately by a committee of the CES.

~~**B. PURPOSE.** Sabbaticals are designed to encourage scientific inquiry, research, artistic creation, clinical/technical expertise, innovation in teaching or to acquire professional skills or training.~~

~~**DC. PERIOD OF SABBATICAL AND RESTRICTIONS ON SERVICE EMPLOYMENT AND SALARY.** A sabbatical is for one-half academic or fiscal year at full pay or one full academic or fiscal year at half pay, depending on the type of appointment held by the faculty member. Faculty on sabbatical continue to be full time employees of the University. Outside employment while on sabbatical must be disclosed per FSH 3260.~~

~~**ED. APPLICATION FOR SABBATICAL.** Complete applications for sabbatical must be submitted to the provost or designee who will collect and forward them to the Sabbatical Leave Evaluation Committee (SLEC). The application must contain:~~

~~**ED-1. Cover Page.** The required cover page template is available on the Provost's Office website.~~

~~**ED-2. Abstract.** Maximum length: 100 words.~~

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**ED-3. Description of Proposed Plan for Sabbatical.** Major headings should include a detailed ~~statement of what the applicant plans to do while on sabbaticals~~sabbatical plan, ~~the~~-objectives and significance of the proposed activities, ~~the~~-value of these activities to the applicant's UI obligations, ~~the~~-feasibility and methods of accomplishing the objectives, and ~~the~~-applicant's qualifications pertinent to the proposed activities. This section ~~should~~shall consist of not more than~~be a maximum of~~ four single-spaced ~~typewritten~~ pages and written for a non-specialist audience. In the case of an application for a sabbatical crossing over the beginning of a new fiscal year, an explanation of the reasons for the timing of the sabbatical should be provided.

**ED-4. Curriculum Vitae (CV).** The applicant's CV ~~must be on the~~shall follow the standard University of Idaho format.

**ED-5. Letters of recommendation.** Letters of recommendation from both the applicant's college dean and direct supervisor (if the applicant's direct supervisor is not the college dean). A letter of recommendation from both the applicant's college dean and unit administrator (if applicable).

**ED-6. Appendix.** Letters of invitation or acceptance from persons with whom the applicant plans to work, itinerary, and other supportive documentation should be appended to the application.

**FE. CRITERIA AND RATING SYSTEM USED IN EVALUATING APPLICATIONS.** The SLEC evaluates applications according to the criterion and rating system set forth in this policy below and makes recommendations to the provost who notifies applicants of the disposition of the application.

**FE-1. Criteria:**

**a. Preparation, Thought, and Documentation:** Organization of the application, originality of the idea, thoroughness, specificity, feasibility, preliminary work done on the project in addition to the planning, letters of appointment and acceptance, other documents supportive of the application, and the applicant's plans for travel, if that is an integral feature of the application.

**b. Benefit to UI and Applicant:** Contribution to applicant's knowledge and understanding, contribution to teaching or other assigned duties at UI, publications or other scholarly works resulting from the project, enhancement of professional status, recognition for UI, and contribution to special projects or to UI programs.

**c. Applicant's Record of or Potential for Research, Teaching, Service and/or Other Pertinent Activity:** Publications, performances, grants, postdoctoral fellowships, sabbaticals, participation in relevant professional organizations, record of achievement on previous grants and leaves (FSH 3710), evaluation by unit administrator and dean, and evidence of excellence in teaching, service, or other evidence of contribution to the university.

**d. Decision:** The decision as to the acceptability of an application may not be based on whether additional remuneration may be received by the sabbatical applicant.

**FE-2. Rating System.** The application will be rated by the SLEC according to the following ~~100~~30-point rating system based on the categories in F-1 a through c:

~~a. Merit and feasibility of the proposed sabbatical plan, 60 points.~~

~~a. Preparation, thought and documentation, 10 points~~

~~a-b. Benefit to UI and applicant, 10 points~~

~~c.b. Applicant's record or potential for research, teaching, service and/or other pertinent activity, 25-7 points.~~

~~d.e. Length of service to UI in a tenure-track position and timing of their most recent sabbatical, up to 153 points. Each year of service, counting from the faculty member's initial appointment in a tenure-track position or from their most recent sabbatical, whichever is less, will be considered.~~

**GF. SCHEDULE FOR APPLYING.** Each year there are two rounds of application consideration. Please see Provost's Office website for up-to-date application and sabbatical schedules. The deadlines below reflect the date

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materials are due to the Provost's office. Colleges and Units will have due dates prior to the dates listed below:

**GF-1. Round 1. Deadline March 31<sup>st</sup>.** This deadline applies to:

- a. Faculty with an academic year appointment planning to begin a full-year sabbatical at the start of the second fall semester after submitting the application;
- b. Faculty with an academic year appointment planning to begin a one-semester sabbatical at the start of the second fall semester or the second spring semester after submitting the application;
- c. Faculty with a fiscal year appointment planning to begin a full-year sabbatical at the start of the second fiscal year after submitting the application;
- d. Faculty with a fiscal year appointment planning to begin a half-year sabbatical during the second fiscal year after submitting the application.

**GF-2. Round 2. Deadline October 31<sup>st</sup>.** This deadline applies to:

- a. Faculty with an academic year appointment planning to begin a full-year sabbatical at the start of the next fall semester;
- b. Faculty with an academic year appointment planning to begin a one-semester sabbatical at the start of the next fall semester or the second spring semester after submitting the application;
- c. Faculty with a fiscal year appointment planning to begin a full-year sabbatical at the start of the next fiscal year after submitting the application;
- d. Faculty with a fiscal year appointment planning to begin a half-year sabbatical during the next fiscal year after submitting the application.

**HG. POSITION DESCRIPTION AND ANNUAL PERFORMANCE EVALUATION.** Faculty members on sabbatical remain full time employees of UI. Faculty members are expected to submit a new position description prior to the start of their sabbatical that reflects the appropriate change in duties while on sabbatical. Their annual performance evaluation must reflect whether the purpose and goals of the sabbatical were achieved. Obligations while on sabbatical should be guided by the position description. In most cases the position description will be changed to 100% scholarly and creative activities during the sabbatical.

**IH. CHANGES IN SABBATICAL.** If a faculty member must change the purpose, place, or time of the sabbatical, the faculty member must submit a revised cover sheet indicating the type of change along with an updated recommendation from the dean and unit administrator, to the SLEC. This request must state the rationale for the changes and update the sabbatical plan to reflect these changes. The SLEC will review the change and make a recommendation to the provost for final approval. ~~This request must state the rationale for the changes and update the sabbatical plan to reflect these changes.~~

**JI. CANCELLATION OF SABBATICAL.** If a sabbatical must be cancelled, the faculty member must submit written notification of cancellation to the Provost's Office along with confirmation from the dean and unit administrator (if applicable). Cancelled sabbaticals cannot be reinstated, but faculty may re-apply through the normal application process.

**KJ. RETURN.** Faculty members must return to the active service of UI for at least one contracted academic or fiscal year based on the faculty member's appointment type after completion of the sabbatical or repay the gross salary money received from UI while on sabbatical, unless the president approves a waiver of this requirement. Results of the sabbatical should be documented on the annual performance evaluation and will serve as the official record of return and accomplishment.

### Version History

**Amended July 2019.** Changes were made to address benefits that are affected while on sabbatical and to clarify language about timelines, eligibility, and support letters.

**Amended January 2018.** Revised and reorganized to better reflect process and to remove the recusal language added in 2016 which was found to cause more problems than it solved.

**Amended July 2016.** Changes were made to clarify processes and to ensure that any SEC member who submits a

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sabbatical application while serving on the committee recuse themselves from all evaluations during said period.

**Amended July 2013.** Revised J.

**Amended January 2012.** Editorial changes to D-6, E-1 c, H and J.

**Amended January 2011.** Editorial changes to C.

**Amended July 2009.** Editorial changes to A.

**Amended July 2002.** Revised J. Editorial changes to A and D-6.

**Amended July 2001.** Editorial changes to A.

**Amended July 1997.** Revised D-3, E-1 a, b, c, E-2 a, c and J. Added E-2 b.

**Amended July 1998.** Editorial changes to D-6 and E-1 c.

**Adopted 1979.**



# 2025

## **Report on the Impact of Expanding Sabbatical to Clinical Faculty and Instructors**

### **Prepared by:**

Kristin Haltinner, Faculty Senate Vice Chair

### **Support from:**

Erin Chapman, Member of Faculty Affairs Committee and Ad Hoc Committee on Non-Tenure Track Faculty

Florian Justwan, Chair of the Ad Hoc Committee on Non-Tenure Track Faculty

Jamaica Richter, Member of Ad Hoc Committee on Non-Tenure Track Faculty

Barbara Kirchmeier, Director of General Education; Member of Ad Hoc Committee on Non-Tenure Track Faculty

Tim Murphy, Faculty Senate Chair

## EXECUTIVE SUMMARY

This report evaluates the impact of expanding sabbatical eligibility at the University of Idaho to include clinical faculty and instructors to parallel recent changes to the state board policy. Currently, at UI, only tenured faculty are eligible after six years of service. Clinical faculty and instructors—who often carry heavier teaching loads—are not eligible, despite sabbatical’s stated purpose of supporting innovation in teaching and professional development, in addition to scholarly engagement.

Clinical faculty and instructors play a central role in delivering the university’s teaching mission. High course loads limit opportunities for course redesign, pedagogical innovation, and professional growth. Expanding sabbatical access would better align policy with the university’s mission of excellence in teaching and transformative education. Recent State Board policy changes now permit sabbatical eligibility for any faculty member with six years of service, clearing the way for institutional action. Peer institutions already extend similar benefits to non-tenure-track faculty.

Using current sabbatical participation rates (30%) as a conservative estimate:

- Clinical faculty expansion would result in an average of 3.55 additional sabbaticals per year university-wide (less than one per college)
- Instructor expansion would result in 1.6 additional sabbaticals per year university-wide

In most colleges, the projected increase would be fewer than one additional sabbatical annually. Deans would retain discretion over awards.

Even accounting for the cost of covering courses, the expansion is projected to yield a positive return on investment, due to increased productivity and reduced turnover:

- Clinical faculty expansion: ~\$10,000 annual net benefit
- Instructor expansion: ~\$43,000 annual net benefit

Expanding sabbatical eligibility to clinical faculty and instructors is financially sustainable, mission-aligned, and modest in scope. It strengthens teaching quality, improves retention and morale, aligns UI with peer institutions, and represents a net benefit to the university.

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## HISTORY OF SABBATICALS AT THE UNIVERSITY OF IDAHO

The University of Idaho Sabbatical Leave Policy (FSH 3720) was adopted in 1979. The articulated purpose of sabbatical is to “encourage scientific inquiry, research, artistic creation, technical expertise, innovation in teaching or to acquire professional skills or training.”

Until approximately 2013, sabbaticals were centrally funded by the Provost’s Office. Under this model, there was a set amount of funding available for sabbaticals. Sabbatical proposals were ranked by the Sabbatical Leave Evaluation Committee and the top ranked sabbaticals were awarded until funding was exhausted. From 2008-2013 an average of 5.6 sabbaticals were awarded per academic year.

	Number of Sabbaticals Taken*
AY 19-20	36
AY 20-21	20
AY 21-22	24
AY 22-23	21
AY 23-24	36
AY 24-25	26
<b>Total Over Six Years</b>	<b>163</b>
<b>Average Per Year</b>	<b>27.16666667</b>
<b>Median Per Year</b>	<b>25</b>
*Data Provided by the Vice Provost for Faculty	

	Number of Sabbaticals Taken*
AY 08-09	4
AY 09-10	5
AY 10-11	7
AY 11-12	4
AY 12-13	8
AY 13-14	15
AY 14-15	12
AY 15-16	24
AY 16-17	20
AY 17-18	10
AY 18-19	16
AY 19-20	36
AY 20-21	20
AY 21-22	24
AY 22-23	21
AY 23-24	36
AY 24-25	26
*Data Provided by Vice Provost for Faculty Affairs	

Around 2013, funding for sabbaticals shifted to the colleges. Different colleges have different policies regarding the availability of semester vs. academic year sabbaticals due to their financial impacts. Since this shift, the average number of sabbaticals taken per academic year has risen to 21.7. In the last six years the average number of sabbaticals taken was 27, the median 25.

## SABBATICAL PROCESS AND CURRENT ELIGIBILITY

Currently a tenured faculty member is eligible to apply for sabbatical after six years of employment at UI. Once a sabbatical is taken, they are then eligible to reapply six years after their previous leave.

A sabbatical may be either one semester or one academic year long. A faculty member taking a semester long sabbatical receives their full salary. An awardee taking a yearlong sabbatical receives half of their salary for the year. The availability of semester-long sabbaticals is limited in some colleges due to the nature of sabbatical funding. During a sabbatical a faculty member continues to receive benefits.

A faculty member interested in taking a sabbatical must apply through the Sabbatical Evaluation Committee and is assessed on the level of preparation, thought, and documentation of the project; the project’s benefit to UI and the applicant (including contribution to teaching); and the applicant’s record of success at UI. Upon returning from sabbatical, an applicant must return to UI for at least one academic year or repay the money they received while on sabbatical.

## RATIONALE FOR EXPANDING SABBATICALS TO CLINICAL AND INSTRUCTIONAL FACULTY AT UI

UI policy regarding sabbaticals includes a recognition of the importance of facilitating faculty in their pursuit of “innovation in teaching” and “to acquire professional skills or training.” For clinical faculty members and instructors, many of whom are teaching as many as eight courses per year, there is little time to reimagine, expand, update, and renovate courses in light of contemporary and emerging scholarship. There is, similarly, little time to develop new skills in their work.

The mission of the University of Idaho is to “shape the future through innovative thinking, community engagement, and transformative education.” This is to be accomplished, in part, through “excellence in teaching” and engagement with the Idaho community.

As clinical faculty and instructors contribute significantly to the education of undergraduate and graduate students, it is imperative to the University’s mission that they have ample time to stay abreast of contemporary scholarship, emerging pedagogical developments, novel technological advances in teaching, and to update their courses accordingly. Doing so requires leave from teaching to provide the time required for such engagement. Additionally, some clinical faculty engage in scholarship (in both traditional research areas and in pedagogy), yet they currently lack the ability to take a sabbatical to focus on these activities.

Sabbaticals also intend to provide time for faculty to engage in “scientific inquiry, research, artistic creation, [and] clinical/technical expertise.” Position descriptions vary by program, but some clinical faculty also conduct research or are in technical fields. There are also some faculty who are “research faculty” who are also clinical faculty.

Other universities in our region offer sabbatical to clinical faculty and/or instructors, not just tenured faculty. Idaho State University outlines its sabbatical leave policy in ISUPP 403 which states that “members of the tenured or clinical faculty who have completed at least six years of full-time employment since appointment to the faculty or since their last sabbatical are eligible for sabbatical leave.” Lewis-Clark State College does not distinguish between the type of faculty eligible for sabbatical and extends it to faculty after “six (6) full academic years of service at Lewis-Clark State college or after six (6) full academic years have elapsed since the faculty member’s most recent sabbatical leave.”

Washington State University refers to sabbatical as “professional leave and retraining” and is currently running a pilot program to allow “associate or professor rank career-track faculty who are on continuous or multiyear appointments and have at least six years of service” to apply. The

### FSH 3720 – Sabbatical Leave

**B. PURPOSE.** Sabbaticals are designed to encourage scientific inquiry, research, artistic creation, clinical/technical expertise, innovation in teaching or to acquire professional skills or training.

current WSU policy only applies to “faculty on permanent appointment” who have “completed at least five years of active service for Washington State University.”<sup>1</sup>

Many of our peer or aspirational peer institutions also extend sabbaticals to faculty not on the tenure track. For example, the University of Washington extends sabbaticals to “faculty and librarians” in their “seventh academic year... or their seventh academic year of service after returning from a previous sabbatical leave.” The University of Minnesota grants sabbatical for tenure track and “contract” (what we would call clinical) faculty after their sixth year of employment and six years after a previous sabbatical. Several additional land-grant, R1 institutions also offer sabbaticals to groups beyond tenure track faculty.

## **DISTINCT ROLES OF CLINICAL FACULTY ACROSS COLLEGES**

One challenge in estimating the impact of expanding sabbatical to clinical faculty and instructors, is the fact that these roles are envisioned and practiced differently in distinct colleges. While the nuance of these distinctions is difficult to capture, the big picture understandings are as follows:

In CLASS and EHHS, clinical faculty and instructors are often regarded as teaching faculty. Clinical faculty typically teach a 3/3 load and instructors a 4/4 load. There is variability to this responsibility among people with administrative roles, who supervise special programs, or otherwise have unique responsibilities. In some colleges clinical faculty may hold research positions<sup>2</sup>. In some colleges, clinical faculty and tenure track faculty have comparable job descriptions. Yet, in other colleges, clinical faculty are clinicians. The changes proposed would continue to offer college deans decision making power over sabbatical awards. Those decisions would likely include consideration of faculty job descriptions and need.

## **CURRENT RATE OF SABBATICAL USE**

To assess the financial and/or practical impact of providing sabbaticals to non-tenure-track faculty, we reviewed historical numbers for sabbaticals taken at UI. Assessing the rate at which faculty take sabbaticals is not straightforward, however. Over the past six years fewer than 30% of eligible faculty have taken sabbaticals. This is calculated as an overestimate by dividing the number of people taking sabbatical in a given year by the number of faculty members in their 6<sup>th</sup>, 12<sup>th</sup>, 18<sup>th</sup>, 24<sup>th</sup>, 30<sup>th</sup>, 36<sup>th</sup> (etc) year. However, if people opt not to apply for sabbatical in their 6<sup>th</sup> year, they remain eligible to apply. This calculation assumes everyone applies according to a 6-year schedule and thus overestimates the rate at which people take sabbaticals. Table 1 shows the

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<sup>1</sup> Note: Washington State does not use the term clinical faculty or instructor – they use “career track” and “short term track.”

<sup>2</sup> In such cases, it is unlikely that this policy change would have an impact as such faculty would not have cause for a release from teaching to conduct research. This would continue to be under the Dean’s discretion.

number of faculty in their 6<sup>th</sup>, 12<sup>th</sup>, 18<sup>th</sup> (etc) year, the number taking sabbatical each year, and the percentage of eligible faculty taking sabbaticals.

In sum, the following assumptions were made in these calculations:

- People applied for sabbatical in their 6<sup>th</sup>, 12<sup>th</sup>, 18<sup>th</sup>, 24<sup>th</sup>, 30<sup>th</sup>, 36<sup>th</sup>, or 42<sup>nd</sup> (etc.) year. (Many faculty apply at longer intervals which would make our estimate higher than reality.)
- People with over six years of service have not left UI in the last six years. (Many have; thus our estimate is, again, higher than reality.)

	AY 19-20	AY 20-21	AY 21-22	AY 22-23	AY 23-24	AY 24-25	Total across all years
<b>Number of Eligible Faculty (6<sup>th</sup>, 12<sup>th</sup>, 18<sup>th</sup>, 24<sup>th</sup>, 30<sup>th</sup>, 36<sup>th</sup>, etc year of service)</b>	59	77	82	58	78	88	442
<b>Total Sabbaticals Taken</b>	28	13	14	24	32	23	134
<b>Percentage</b>	47%	17%	17%	41%	41%	26%	30%

**ESTIMATED IMPACT OF EXPANDING SABBATICALS TO CLINICAL AND INSTRUCTIONAL FACULTY AT UI – UNIVERSITY WIDE**

To estimate the impact that expanding sabbaticals to clinical faculty and instructors would have, we took the total number of people in each group, looked at their years of service, and used the same rate of sabbatical use (30%). This number, again, is an overestimate both in the case of tenure track faculty but also in the case of clinical faculty and sabbaticals. Given that many colleges offer only full academic year sabbaticals and that these are paid at a rate of 50% of one’s salary, it is likely that many clinical faculty (with target salaries at approximately 80% of their tenure track peers) and instructors (with target salaries at approximately 65% of their tenure track peers) will struggle to afford sabbaticals each time they are eligible.

In sum, the following assumptions were made in these calculations:

- People will apply for sabbatical in their 6<sup>th</sup>, 12<sup>th</sup>, 18<sup>th</sup>, 24<sup>th</sup>, 30<sup>th</sup>, 36<sup>th</sup>, or 42<sup>nd</sup> year. (Many wait and apply on a longer time table which would make our estimate higher than reality.)
- People with over six years of service have not left UI in the last six years. (Many people may have; thus, our estimate would be lower than reality.)

- Clinical faculty and instructors would take sabbaticals at the same rate as tenured faculty. (Many colleges require yearlong sabbaticals during which awardees receive 50% of their salary. For many clinical and instructor faculty this financial burden might reduce the frequency at which they take sabbaticals, thereby making our estimate higher than reality.)
- Colleges would offer additional sabbaticals to this group. (Many may try to keep the number of sabbaticals steady, resulting in no financial impact.)

## CLINICAL FACULTY

There are 71 clinical faculty members (including 15 research faculty) who have served more than six years at UI. Clinical faculty can be promoted through the ranks of assistant professor, associate professor, and full professor.

The table below shows the number of faculty who have been employed at UI in six-year increments from each sabbatical year. So, for example, the faculty in our assessment of those eligible for sabbatical in AY 24-25 include those who were in their 6<sup>th</sup>, 12<sup>th</sup>, 18<sup>th</sup>, 24<sup>th</sup>, 30<sup>th</sup>, 36<sup>th</sup>, or 42<sup>nd</sup> year of employment at UI. Again, it is the case that people can apply for sabbatical on an extended schedule thus the number of eligible faculty each year is not a determinable number.

To estimate the number of additional sabbaticals that would be awarded if sabbaticals were available to clinical faculty, we took the number of eligible faculty and multiplied it by 30% - the estimated rate at which tenured faculty take sabbaticals (outlined above). This is likely an overestimate of the number of clinical faculty who will take sabbatical for the reasons described above.

As indicated in the table below, if clinical faculty had been eligible to apply for sabbaticals over the last six years it would have resulted in an increase of 71 eligible faculty members during that time period. Using that 30% rate of sabbatical use, we estimate an additional 21.3 sabbaticals could be taken if the benefit is extended to clinical faculty. This is an average increase of 3.55 sabbaticals per year across the university – less than one per college.

	AY 19-20	AY 20-21	AY 21-22	AY 22-23	AY 23-24	AY 24-25	Total across all years
<b>Number of Additional Eligible Faculty</b>	9	11	8	10	15	18	71
<b>Estimate of Additional Sabbatical Awards (Total number * 30%)</b>	2.7	3.3	2.4	3	4.5	5.4	21.3

<b>Average Additional Sabbaticals Per Year</b>
<b>3.55</b>

## INSTRUCTORS

There are 75 instructors throughout the university including the extension offices. Most are junior faculty (fewer than six years) and are not included in the estimated impacts of tenure over the past six years. If retention rates remain the same, it is unlikely that these estimates will change. There are 32 instructors who would have been eligible for sabbaticals over the last six years.

The table below shows the number of faculty who have been employed at UI in six year increments from each sabbatical year. So, for example, the faculty in our assessment of those eligible for sabbatical in AY 24-25 include those who were in their 6<sup>th</sup>, 12<sup>th</sup>, 18<sup>th</sup>, 24<sup>th</sup>, 30<sup>th</sup>, 36<sup>th</sup>, or 42<sup>nd</sup> year of employment at UI. Again, it is the case that people can apply for sabbatical on an extended schedule thus the number of eligible faculty each year is not a precisely determinable number.

To estimate the number of additional sabbaticals that would be awarded if sabbaticals were available to instructors, we took the number of eligible faculty and multiplied it by 30% (the estimated rate at which tenured faculty take sabbaticals). This is likely an overestimate of the number of instructors who will take sabbatical (see rationale above).

As indicated in the table below, if instructors had been eligible to apply for sabbaticals over the last six years it would have resulted in an increase of 32 eligible faculty over that time period. Using that 30% rate of sabbatical use we estimate an additional 9.6 sabbaticals if the benefit is extended to instructors. This is an average increase of 1.6 sabbaticals per year across the university – less than one per college.

	AY 19-20	AY 20-21	AY 21-22	AY 22-23	AY 23-24	AY 24-25	Total across all years
<b>Number of Additional Eligible Faculty</b>	3	6	7	4	4	8	32
<b>Estimate of Additional Sabbatical Awards (Total number * 30%)</b>	0.9	1.8	2.1	1.2	1.2	2.4	9.6

Average  
Additional  
Sabbaticals Per  
Year

1.6

## ESTIMATED IMPACT OF EXPANDING SABBATICALS TO CLINICAL AND INSTRUCTIONAL FACULTY AT UI BY COLLEGE

Recognizing that colleges differ both in the rate at which faculty take sabbaticals and also the proportion of clinical faculty or instructors employed, we further examined these factors by college.

A summary chart shows the number of currently eligible faculty (total over six years), the rate of sabbatical use, the potential number of new faculty that would be eligible if sabbatical was extended to clinical faculty and instructors respectively, and the number of additional sabbaticals this would lead to (if awarded) by college.

Over the past six years the colleges with the highest rate of sabbatical use (with the assumptions listed above) are CLASS and CLAW, both at 64%. The lowest rate is in CALS and COE at 9%. The only college that would see an impact of more than one sabbatical annually if leave is extended to clinical faculty is CLASS (1.7 people annually). The only college that would see an impact of at least one additional sabbatical per year if the leave is extended to instructors is also CLASS (1/year). CLASS is also the only college that would see an increase of more than one sabbatical if the leave is extended to both clinical faculty and instructors. This information is provided in more detail below.

Again, awarding sabbaticals will continue to be under the discretion of the deans in each college. These estimates are based on a projected rate of clinical faculty and instructor faculty sabbatical use in line with current use and may not reflect the individual college dean priorities.

	Number of Tenured Faculty with 6+ Years of Service	Total Number of Sabbaticals Over Six Year	Rate of Sabbaticals	Number of Clinical Faculty with 6+ Years of service	Number of Instructors with Over 6+ Years of Service	Potential Annual Increase in Sabbaticals if Extended to Clinical	Potential Annual Increase in Sabbaticals if Extended to Instructors
CAA	21	4	19%	5	1	<1 (0.2)	<1 (0.03)
CALS	117	10	9%	6	7	<1 (0.1)	<1 (0.1)
CBE	19	6	32%	2	4	<1 (0.1)	<1 (0.2)
EHHS	21	8	38%	11	3	<1 (0.7)	<1 (0.2)
CLASS	58	37	64%	16	9	1.7	1
CLAW	14	9	64%	4	0	<1 (0.4)	0
CNR	41	19	46%	5	1	<1 (0.4)	<1 (0.1)
COE	64	6	9%	7	1	<1 (0.1)	<1 (0.1)

COS	65	18	28%	4	6	<1 (0.2)	<1 (0.3)
At Large (Library)	9	2	22%	7	0	<1 (0.3)	0
At Large (WWAMI)	9	1	11%	7	0	<1 (0.1)	0
Other (Provost Office, Student Affairs, University Research)	9	1	11%	7	0	<1 (0.1)	0

### ELIGIBLE TENURED FACULTY PER YEAR

To assess the impact of expanding sabbatical leave to clinical faculty by college, we first identified the *current* number of sabbatical-eligible faculty. This is presented in the table below by college and year of sabbatical eligibility. The far-right columns reflect the total number of sabbatical-eligible faculty across six years as well as the average and median per year.

	AY 19-20	AY 20-21	AY 21-22	AY 22-23	AY 23-24	AY 24-25	Total	Average Per Year	Median Per Year
CAA	3	6	2	5	3	2	21	3.5	3
CALS	26	16	16	15	23	21	117	19.5	18.5
CBE	2	2	3	5	6	1	19	3.2	2.5
EHHS	9	2	3	2	3	2	21	3.5	2.5
CLASS	11	18	6	8	7	8	58	9.7	8
CLAW	4	3	1	5	1	0	14	2.3	2
CNR	10	7	10	7	2	5	41	6.8	7
COE	14	8	12	9	14	7	64	10.7	10.5
COS	9	7	7	18	13	11	65	1.5	1.5
At Large (Library and WWAMI)	1	1	2	2	4	2	11	0.5	0
Other (Provost Office, Student Affairs, University Research)	1	3	1	0	4	0	9	1.5	1

We then identified the number of clinical faculty by college who would be eligible if sabbatical was expanded. The table below shows the number of clinical faculty eligible by college and across the six-year period. The rightmost columns express the total number of would-be eligible clinical faculty over six years as well as the average and median per year.

CLINICAL FACULTY:

	AY 19-20	AY 20-21	AY 21-22	AY 22-23	AY 23-24	AY 24-25	Total Over Six Years	Average Per Year	Median Per Year
CAA	2	1	1	0	1	0	5	0.8	1
CALS	1	2	0	1	2	0	6	1	1
CBE	0	0	1	0	1	0	2	0.3	0
EHHS	0	3	0	2	2	4	11	1.8	2
CLASS	2	0	4	4	3	3	16	2.7	3
CLAW	2	1	0	0	0	1	4	0.7	0.5
CNR	0	0	0	0	1	4	5	0.8	0
COE	0	2	0	0	2	3	7	1.2	1
COS	1	0	2	1	0	0	4	0.7	0.5
At Large (Library)	0	0	0	0	0	0	0	0	0
At Large (WWAMI)	0	0	0	2	3	2	7	1.2	1
Other (Provost Office, Student Affairs, University Research)	0	0	0	0	0	0	0	0	0

We then identified the number of clinical faculty and instructors by college who would be eligible if sabbatical was expanded. The table below shows the number of instructors eligible by college and across the six-year period. The rightmost columns express the total number of would-be eligible instructors over six years as well as the average and median per year.

INSTRUCTORS:

	AY 19-20	AY 20-21	AY 21-22	AY 22-23	AY 23-24	AY 24-25	Total	Average Per Year	Median Per Year
CAA	0	0	0	0	0	1	1	0.2	0
CALS	0	1	3	1	2	0	7	1.2	1
CBE	0	2	2	0	0	0	4	0.7	0
EHHS	0	2	0	0	0	1	3	0.5	0
CLASS	2	0	2	0	2	3	9	1.5	2
CLAW	0	0	0	0	0	0	0	0	0
CNR	0	0	0	0	0	1	1	0.2	0
COE	0	0	0	0	0	1	1	0.2	0
COS	1	0	2	1	1	1	6	1	1
At Large (Library)	0	0	0	0	0	0	0	0	0
At Large (WWAMI)	0	0	0	0	0	0	0	0	0
Other (Provost Office, Student	0	0	0	0	0	0	0	0	0

Affairs, University Research)									
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To estimate the potential impact on each college, given their individual practices and population, we next calculated the rate of sabbatical use for each college.

	Number of Tenured Faculty with 6+ Years of Service	Total Number of Sabbaticals Over Six Year	Rate of Sabbaticals
CAA	21	4	19%
CALS	117	10	9%
CBE	19	6	32%
EHHS	21	8	38%
CLASS	58	37	64%
CLAW	14	9	64%
CNR	41	19	46%
COE	64	6	9%
COS	65	18	28%
At Large (Library)	9	2	22%
At Large (WWAMI)	9	1	11%
Other (Provost Office, Student Affairs, University Research)	9	1	11%

Finally, using the calculated sabbatical rate for tenured faculty by college, we estimated the potential increase in sabbaticals that would be awarded if sabbaticals were extended to clinical faculty. As mentioned earlier, we do suspect that clinical faculty and instructors will apply at a lower rate – especially in some colleges – due to the financial constraints of year long sabbaticals, but we used the rate of current sabbatical use to make these estimates. Therefore, we expect these rates to be higher than actual use. Also, as with the current model, departments, colleges, and the sabbatical leave committee will continue to have discretion over awarding sabbaticals.

### CAA

CAA would see an average of 0.83 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty and an additional 0.17 faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible CAA faculty (19%) they would see an average increase in annual sabbaticals of 0.16 for clinical faculty and 0.03 for instructors (less than 1 person per year).

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 19% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 19% - the college rate of sabbatical awarding)

<b>AY 19-20</b>	2	0.38	0	0
<b>AY 20-21</b>	1	0.19	0	0
<b>AY 21-22</b>	1	0.19	0	0
<b>AY 22-23</b>	0	0	0	0
<b>AY 23-24</b>	1	0.19	0	0
<b>AY 24-25</b>	0	0	1	0.19
<b>Average Per Year</b>	0.83	0.16	0.17	0.03
<b>Median Per Year</b>	1	0.19	0	0
<b>Total Increase Over Six Years</b>	5	0.95	1	0.19

## CALS

CALS would see an average of 1 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty and an additional 1.2 faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible CALS faculty (9%) they would see an average increase in annual sabbaticals of 0.09 for clinical faculty and 0.11 for instructors (less than 1 person per year).

	<b>Number of Clinical Faculty Eligible</b>	<b>Estimated Additional Clinical Sabbaticals (Number x 9% - the college rate of sabbatical awarding)</b>	<b>Number of Instructors Eligible</b>	<b>Estimated Additional Instructor Sabbaticals (Number x 9% - the college rate of sabbatical awarding)</b>
<b>AY 19-20</b>	1	0.09	0	0
<b>AY 20-21</b>	2	0.18	1	0.09
<b>AY 21-22</b>	0	0	3	0.27
<b>AY 22-23</b>	1	0.09	1	0.09
<b>AY 23-24</b>	2	0.18	2	0.18
<b>AY 24-25</b>	0	0	0	0
<b>Average Per Year</b>	1	0.09	1.2	0.11
<b>Median Per Year</b>	1	0.09	1	0.09
<b>Total Over Six Years</b>	6	0.54	7	0.63

## CBE

CBE would see an average of 0.33 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty and an additional 0.67 faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible CBE faculty (32%) they would see an average increase in annual sabbaticals of 0.10 for clinical faculty and 0.21 for instructors (less than 1 person per year).

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 32% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 32% - the college rate of sabbatical awarding)
AY 19-20	0	0	0	0
AY 20-21	0	0	2	0.64
AY 21-22	1	0.32	2	0.64
AY 22-23	0	0	0	0
AY 23-24	1	0.32	0	0
AY 24-25	0	0	0	0
<b>Average Per Year</b>	0.33	0.10	0.67	0.21
<b>Median Per Year</b>	0	0	0	0
<b>Total Over Six Years</b>	2	0.64	4	1.28

## EHHS

EHHS would see an average of 1.83 additional faculty eligible for sabbatical if the benefit was extended to clinical faculty and an additional 0.5 faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible EHHS faculty (38%) they would see an average increase in annual sabbaticals of 0.70 for clinical faculty and 0.19 for instructors (less than 1 person per year).

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 38% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 38% - the college rate of sabbatical awarding)
AY 19-20	0	0	0	0
AY 20-21	3	1.14	2	0.76
AY 21-22	0	0	0	0
AY 22-23	2	0.76	0	0
AY 23-24	2	0.76	0	0
AY 24-25	4	1.52	1	0.38
<b>Average Per Year</b>	1.83	0.70	0.5	0.19
<b>Median Per Year</b>	2	0.76	0	0
<b>Total Over Six Years</b>	11	4.18	3	1.14

## CLASS

CLASS would see an average of 2.67 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty and an additional 1.5 faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible CLASS faculty (64%) they would see an average increase in annual sabbaticals of 1.71 for clinical faculty and 0.96 for instructors.

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 64% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 64% - the college rate of sabbatical awarding)
AY 19-20	2	1.28	2	1.28
AY 20-21	0	0	0	0
AY 21-22	4	2.56	2	1.28
AY 22-23	4	2.56	0	0
AY 23-24	3	1.92	2	1.28
AY 24-25	3	1.92	3	1.92
<b>Average Per Year</b>	2.67	1.71	1.5	0.96
<b>Median Per Year</b>	3	1.92	2	1.28
<b>Total Over Six Years</b>	16	10.24	9	5.76

## CLAW

CLAW would see an average of 0.67 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty. They currently have no qualified instructors. If clinical faculty were to take sabbatical at the same rate as currently eligible CLAW faculty (64%) they would see an average increase in annual sabbaticals of 0.43 for clinical faculty (less than 1 person per year).

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 64% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 64% - the college rate of sabbatical awarding)
AY 19-20	2	1.28	0	0
AY 20-21	1	0.64	0	0
AY 21-22	0	0	0	0
AY 22-23	0	0	0	0
AY 23-24	0	0	0	0
AY 24-25	1	0.64	0	0

<b>Average Per Year</b>	0.67	0.43	0	0
<b>Median Per Year</b>	0.5	0.32	0	0
<b>Total Over Six Years</b>	4	2.56	0	0

## CNR

CNR would see an average of 0.83 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty and an additional 0.17 faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible CNR faculty (46%) they would see an average increase in annual sabbaticals of 0.38 for clinical faculty and 0.08 for instructors (less than 1 person per year).

	<b>Number of Clinical Faculty Eligible</b>	<b>Estimated Additional Clinical Sabbaticals (Number x 46% - the college rate of sabbatical awarding)</b>	<b>Number of Instructors Eligible</b>	<b>Estimated Additional Instructor Sabbaticals (Number x 46% - the college rate of sabbatical awarding)</b>
<b>AY 19-20</b>	0	0	0	0
<b>AY 20-21</b>	0	0	0	0
<b>AY 21-22</b>	0	0	0	0
<b>AY 22-23</b>	0	0	0	0
<b>AY 23-24</b>	1	0.46	0	0
<b>AY 24-25</b>	4	1.84	1	0.46
<b>Average Per Year</b>	0.83	0.38	0.17	0.08
<b>Median Per Year</b>	0	0	0	0
<b>Total Over Six Years</b>	5	2.3	1	0.46

## COE

COE would see an average of 1.17 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty and an additional 0.17 faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible COE faculty (9%) they would see an average increase in annual sabbaticals of 0.11 for clinical faculty and 0.02 for instructors (less than 1 person per year).

	<b>Number of Clinical Faculty Eligible</b>	<b>Estimated Additional Clinical Sabbaticals (Number x 9% - the college rate of sabbatical awarding)</b>	<b>Number of Instructors Eligible</b>	<b>Estimated Additional Instructor Sabbaticals (Number x 9% - the college rate of sabbatical awarding)</b>
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<b>AY 19-20</b>	0	0	0	0
<b>AY 20-21</b>	2	0.18	0	0
<b>AY 21-22</b>	0	0	0	0
<b>AY 22-23</b>	0	0	0	0
<b>AY 23-24</b>	2	0.18	0	0
<b>AY 24-25</b>	3	0.27	1	0.09
<b>Average Per Year</b>	1.17	0.11	0.17	0.02
<b>Median Per Year</b>	1	0.09	0	0
<b>Total Over Six Years</b>	7	0.63	1	0.09

## COS

COS would see an average of 0.67 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty and an additional faculty if extended to instructors. If these groups were to take sabbatical at the same rate as currently eligible COS faculty (28%) they would see an average increase in annual sabbaticals of 0.19 for clinical faculty and 0.28 for instructors (less than 1 person per year).

	<b>Number of Clinical Faculty Eligible</b>	<b>Estimated Additional Clinical Sabbaticals (Number x 28% - the college rate of sabbatical awarding)</b>	<b>Number of Instructors Eligible</b>	<b>Estimated Additional Instructor Sabbaticals (Number x 28% - the college rate of sabbatical awarding)</b>
<b>AY 19-20</b>	1	0.28	1	0.28
<b>AY 20-21</b>	0	0	0	0
<b>AY 21-22</b>	2	0.56	2	0.56
<b>AY 22-23</b>	1	0.28	1	0.28
<b>AY 23-24</b>	0	0	1	0.28
<b>AY 24-25</b>	0	0	1	0.28
<b>Average Per Year</b>	0.67	0.19	1	0.28
<b>Median Per Year</b>	1	0.14	1	0.28
<b>Total Over Six Years</b>	4	1.12	6	1.68

## AT LARGE – LIBRARY

The Library would see an average of 1.17 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty. There are currently no eligible instructors. If eligible clinical faculty were to take sabbatical at the same rate as currently eligible Library faculty (22%) they would see an average increase in annual sabbaticals of 0.26 for clinical faculty (less than 1 person per year).

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 22% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 22% - the college rate of sabbatical awarding)
AY 19-20	0	0	0	0
AY 20-21	0	0	0	0
AY 21-22	0	0	0	0
AY 22-23	2	0.44	0	0
AY 23-24	3	0.66	0	0
AY 24-25	2	0.44	0	0
<b>Average Per Year</b>	1.17	0.26	0	0
<b>Median Per Year</b>	1	0.22	0	0
<b>Total Over Six Years</b>	7		0	0

AT LARGE – SHAMP

SHAMP would see an average of 1.17 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty. There are currently no eligible instructors. If eligible clinical faculty were to take sabbatical at the same rate as currently eligible SHAMP faculty (11%) they would see an average increase in annual sabbaticals of 0.13 for clinical faculty (less than 1 person per year).

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 11% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 11% - the college rate of sabbatical awarding)
AY 19-20	0	0	0	0
AY 20-21	0	0	0	0
AY 21-22	0	0	0	0
AY 22-23	2	0.22	0	0
AY 23-24	3	0.33	0	0
AY 24-25	2	0.22	0	0
<b>Average Per Year</b>	1.17	0.13	0	0
<b>Median Per Year</b>	1	0.11	0	0
<b>Total Over Six Years</b>	7	0.77	0	0

OTHER (PROVOST OFFICE, STUDENT AFFAIRS, UNIVERSITY RESEARCH)

Other at large programs collectively would see an average of 1.17 additional faculty eligible for sabbatical annually if the benefit was extended to clinical faculty. There are currently no eligible instructors. If eligible clinical faculty were to take sabbatical at the same rate as currently eligible other at large faculty (11%) they would see an average increase in annual sabbaticals of 0.13 for clinical faculty (less than 1 person per year).

	Number of Clinical Faculty Eligible	Estimated Additional Clinical Sabbaticals (Number x 11% - the college rate of sabbatical awarding)	Number of Instructors Eligible	Estimated Additional Instructor Sabbaticals (Number x 11% - the college rate of sabbatical awarding)
AY 19-20	0	0	0	0
AY 20-21	0	0	0	0
AY 21-22	0	0	0	0
AY 22-23	2	0.22	0	0
AY 23-24	3	0.33	0	0
AY 24-25	2	0.22	0	0
<b>Average Per Year</b>	1.17	0.13	0	0
<b>Median Per Year</b>	1	0.11	0	0
<b>Total Over Six Years</b>	7	0.77	0	0

## RETURN ON INVESTMENT OF SABBATICAL EXPANSION BY COLLEGE

Sabbatical comes with a potential financial cost to colleges but also has the potential for cost savings in the form of increased productivity and a reduction in turn over.

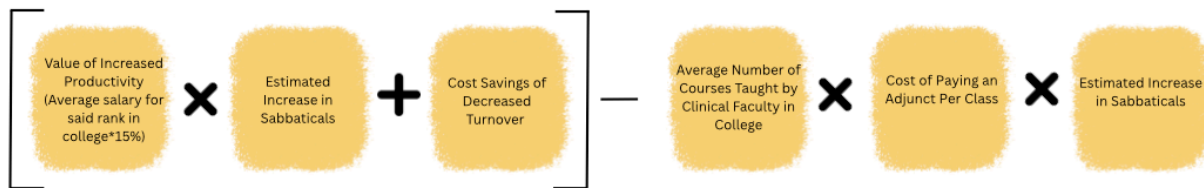
For these calculations, we had to make some assumptions about the impact of sabbatical, informed by research on related benefits at corporations (there was no related scholarly work on the impact of sabbaticals as found through multiple Google Scholar searches). Existing scholarship suggests that annual leave increases productivity between 10 and 25%. Given the specific use of sabbatical for professional development – in addition to its benefits to an employee’s morale and energy – we (under)estimated the impact on productivity to be 15%. Productivity itself is difficult to assess in higher education – but it is envisioned as increased student retention and satisfaction due to improvement in teaching; elevated teaching and engagement as a result of professional development opportunities; and similar impacts to the university.

Existing scholarship also suggests that organizations with sabbaticals have a lower turnover rate than others, to the tune of 25%. Though U of I has a relatively low turnover rate of faculty already (2.4%) this 25% reduction is small but has financial impacts in shrinking the loss of productivity and institutional knowledge associated with a vacant position and the cost of a search. The estimation of the cost of turn over below includes a calculation of the cost to run a

search (estimated at \$15,000 + the loss of productivity in the year of a vacancy). It was then multiplied by the reduced loss due to decreased turnover – calculated at 25% of 2.40 (the current turnover rate) x the number of clinical faculty.

Therefore, to assess the financial impact of sabbatical expansion we used the following formula:

[Value of increased productivity (average salary \* 0.15) \* estimated increase in sabbaticals (1.6) + cost savings in decreased turnover] – [Average number of courses taught by clinical faculty \* cost of paying adjunct per class \* estimated increase in sabbaticals]



While we are unable to assess the impact on each college specifically, as each Dean will continue to have the ability to offer sabbaticals under their individualized policies, we can calculate a university-level impact under the assumption that all colleges were to increase the number of sabbaticals currently offered to match the estimate increase in applications (thereby maintaining the current proportion of approved sabbaticals).

### *Clinical Faculty*

Using the formula, we calculated the following:

- Value of increased productivity: \$45,078.21 (Average clinical professor salary (\$84,655) across UI \* 0.15 \* number of sabbaticals per year)
- Cost savings of decreased turn over: \$50,225.96 (Retention of ½ of a person \* cost of search (15,000) \* cost of loss of productivity during vacancy (average clinical faculty salary))
- Average number of courses taught by clinical faculty: 2.5 (across the university, ranges within college)
- Internal cost of adjunct per course: \$4500
- Estimated increase in sabbaticals = 3.55

ROI: \$10,288.47 in **benefit** to the university (per year) in increased productivity and reduced turnover despite costs to replace instruction

### *Instructor Faculty*

- Value of increased productivity: \$17,499.46 (Average clinical professor salary (\$72,914) across UI \* 0.15 \* number of sabbaticals per year (1.6))
- Cost savings of decreased turn over: \$21,978.60 (Retention of 0.8 of a person \* cost of search (15,000) \* cost of loss of productivity during vacancy (average instructor faculty salary))
- Average number of courses taught by clinical faculty: 4 (across the university, ranges within college)
- Internal cost of adjunct per course: \$4500
- Estimated increase in sabbaticals = 1.6

ROI: \$42,938.15 in **benefit** to the university (per year) in increased productivity and reduced turnover despite costs to replace instruction

We conclude that, even with the cost of covering courses, expanding sabbatical to include clinical faculty and instructors will have a positive return on investment for the university.

### **CURRENT ALTERNATIVE TO SABBATICAL: PROFESSIONAL IMPROVEMENT LEAVE**

The University of Idaho also provides “Professional Improvement Leave.” This leave is available to all faculty “with instructor rank or above, exempt employees and classified staff.”

Like sabbatical, professional improvement leave is paid and one taking such leave retains their benefits. The goal for this leave includes time away for an employee to “attain or enhance a skill set that will result in a mutual benefit to both the university and the employee.” The leave only applies in cases in which people will be gone more than two weeks. People eligible to take this leave must have served at UI for at least four years and two years must have passed since their sabbatical or last professional leave.

People requesting professional improvement leave must submit a letter to their supervisor at least three months in advance of their anticipated leave. This letter must explain the need for leave, its duration, and any funding associated. As with sabbaticals, one must return to service at the university for at least one year after their leave or pay back the money they were paid during the leave.

Professional improvement leave must be approved by one’s supervisor, their dean or director, and the provost’s office. Professional improvement leave is funded by one’s college. It is often difficult for people with teaching contracts to access this leave, given their course commitments.

Professional improvement leave is different than sabbatical in that a) it does not go through the peer review process of the Sabbatical Leave Evaluation Committee, b) it is not awarded for a set length of time, c) it does not carry the same level of prestige as associated with tenure (in that tenure projects are required to improve one’s ability to contribute to the mission of the

university), and d) because it is not advertised in the way that sabbatical is,<sup>3</sup> many non-tenure-track faculty are not even aware that this type of leave is available to them.

## STATE BOARD POLICY

In December of 2025 the State Board changed the sabbatical policy to make eligible any faculty member with six years of service, paving the way for institutions to do the same.

### 6. Sabbatical Leave

1. Eligibility: A sabbatical leave may be granted at the discretion of the chief executive officer to a faculty member who has completed at least six (6) years of full-time service at an institution. A sabbatical leave may not be awarded to the same faculty member more than once in any six (6) academic years and sabbatical leave time is not cumulative. Sabbatical leave proposals must be submitted, reviewed, and processed according to policies and procedures established at each institution. A sabbatical leave may be used for the purpose of acquiring and/or updating professional skills and knowledge, innovation in teaching, or for conducting research or creative activity. Sabbatical leave awards are fully dependent on the availability of appropriate funding.

## RECOMMENDATION

The Non-Tenure Track Ad Hoc Senate Committee recommends that the University of Idaho include clinical faculty and instructors in the existing sabbatical leave policy.

This would require the following changes to FSH: 3720, Section A:

**C. GENERAL POLICY.** Members of the UI faculty [see 1520 II-1] having completed six years of full-time employment at the University of Idaho may be granted sabbatical. Faculty may apply for additional sabbaticals provided that six full academic years have elapsed since the end of the most recent sabbatical and the beginning of the requested sabbatical.

The University should preserve the professional improvement leave policy (FSH 3710) as it currently stands such that it is available to faculty for special projects (such as an extended training or visiting professorship) and staff.

We conclude that extending eligibility for this benefit is a net positive for the University of Idaho. Doing so will enable teaching faculty to contribute to the fulfillment of the mission of the University of Idaho to provide “transformative education” through excellence in teaching. It also fits the purpose of sabbatical which includes the development of new “innovation in teaching.” It will also extend the ability to develop one’s scholarship to clinical faculty who hold research positions, in part or full.

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<sup>3</sup> Multiple times per year, reminders are sent out about the application deadlines for sabbaticals

Second, extending eligibility for this benefit will strengthen the University of Idaho's ability to recruit and retain clinical faculty and instructors. Several peer institutions already extend this benefit to teaching faculty. As the target salaries for clinical faculty and instructors are lower than that of tenure track faculty, extending sabbatical is an essential part of supporting clinical faculty and instructors and demonstrating our commitment to excellence in teaching through facilitating their professional development.

Finally, extending eligibility for sabbaticals will boost morale at the University of Idaho by demonstrating to everyone that we listen to, hear, and support all of our team members – that all of our faculty's time and contributions to the university are valued.

DRAFT

## APPENDIX A: LETTER OF SUPPORT FROM AFT

February 11, 2026

Dear President Green, Faculty Senate, and Members of University Leadership,

On behalf of AFT Local 3215, we write to express our strong support for the Ad Hoc Committee on Non-Tenure Track Faculty's recommendation to amend the University of Idaho's sabbatical leave policy (FSH 3720) to extend eligibility to clinical faculty and instructors. This recommendation is both timely and well grounded, particularly in light of the State Board of Education's December 2025 policy revision explicitly permitting sabbatical eligibility for any faculty member with six years of full-time service.

Clinical faculty and instructors play an indispensable role in fulfilling the University of Idaho's mission to provide transformative education through excellence in teaching, innovation, and community engagement. In most colleges, these faculty members carry substantial instructional responsibilities, often with heavier teaching loads than their tenure-track colleagues, leaving little opportunity to engage in the sustained professional development, pedagogical renewal, and scholarly engagement that sabbaticals are designed to support. Extending sabbatical eligibility would directly enhance instructional quality, curricular innovation, and student learning across the institution, fulfilling our mission as the land grant institution in Idaho.

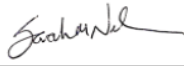
From a labor and equity perspective, this policy change is especially important. Clinical faculty and instructors are hired at reduced target salaries—approximately 80% and 65% of their tenure-track peers, respectively—and are excluded from access to certain rights and professional opportunities, including eligibility for some administrative leadership roles and the ability to serve as principal investigators on certain grant applications. In this context, the continued exclusion of these faculty from sabbatical leave represents a significant inequity. Expanding eligibility would help mitigate long-standing disparities and affirm that the University values the professional contributions of all faculty, regardless of appointment type.

We also emphasize the positive impact this change would have on faculty morale and retention. Sabbaticals are widely recognized as a critical tool for sustaining professional vitality, preventing burnout, and retaining experienced educators. The evidence presented in the Faculty Senate report demonstrates that expanding eligibility would result in a modest and manageable increase in sabbatical usage—less than one additional sabbatical per college per year on average—while yielding meaningful returns in productivity, institutional knowledge, and faculty commitment. In a competitive higher education labor market, offering equitable access to sabbaticals strengthens the University of Idaho's ability to recruit and retain talented clinical faculty and instructors.

Finally, extending sabbatical eligibility sends a powerful institutional message: that the University of Idaho listens to its faculty, adapts to evolving professional realities, and is committed to fairness and shared investment in excellence. This policy change aligns UI with peer and aspirational institutions and reflects best practices across higher education.

AFT Local 3215 strongly urges the administration to adopt the recommended revisions to FSH 3720 and formally include clinical faculty and instructors in the University of Idaho's sabbatical leave policy. We view this change as an essential step toward a more equitable, supportive, and forward-looking institution.

Sincerely,  
AFT Local 3215  
University of Idaho



Sarah Nelson  
President



Russ Meeuf  
Vice-President



Ashley Kerr  
Secretary



You Qiang  
Treasurer

# **FAQ: Sabbatical Expansion Project**

## **Q1: Will the change in sabbaticals have a financial impact on colleges?**

The financial impact on colleges is expected to be modest. In most colleges, the change would likely result in approximately one additional sabbatical applicant every several years, rather than a large annual increase.

Importantly, the impact will depend on the decisions of deans within each college. As outlined in FSH 3720, deans will retain discretion over sabbatical decisions. This includes:

- Determining the annual budget allocation for sabbaticals within the college
- Approving sabbatical applications according to the criteria and rating system outlined in FSH 3720.E
- Exercising discretion over the sabbatical approval process in accordance with college bylaws

Although colleges may take different approaches to funding sabbaticals, the long-term investment is estimated to be a net positive, based on the return-on-investment (ROI) calculation included in the report.

## **Q2: How will this work in colleges in which faculty must find external sources to cover the cost of their salary?**

In colleges where faculty are expected to obtain external funding to support sabbatical salary, the same requirement would apply to clinical faculty and instructors.

However, this raises an important equity consideration. Clinical faculty and instructors often face greater barriers to securing external grants because their positions may involve heavier teaching loads or fewer opportunities to serve as principal investigators. As a result, requiring external funding can create disparities in access to sabbatical leave.

This issue is not limited to clinical faculty and instructors; it affects many faculty across the university. The Ad Hoc Committee recognizes this as a broader equity concern and views the current system as a practice that should be reconsidered more broadly in the future.

## **Q3: Will there be increased competition for sabbaticals?**

The change is unlikely to substantially increase competition for sabbaticals.

In most colleges, expanding eligibility would translate to roughly one additional applicant every several years. Additionally, the number of sabbatical applications already fluctuates significantly from year to year. Some years see many applicants, while others see relatively few.

Because of this natural variability and the relatively small expected increase in applicants, the overall level of competition is unlikely to change dramatically.

#### **Q4: What are the weaknesses of the ROI calculation?**

As with any financial model, the ROI calculation includes assumptions and limitations.

One limitation is the use of salary as a proxy for productivity. While imperfect, this approach is commonly used in institutional ROI analyses. For example, the University of Idaho used a similar method when estimating the return on investment for parental leave policies.

Another limitation involves estimating the cost of replacing instruction. The ROI model assumes a cost of \$4,500 per course to cover teaching while a faculty member is on sabbatical. In reality, this figure can vary:

- In some cases, instructors cost more than \$4,500 per course.
- In other colleges, courses are not replaced at all, and departments are expected to cover the teaching internally without additional funding.

There are also several factors that are difficult to quantify:

- The potential recruitment benefits of offering sabbatical eligibility to clinical faculty and instructors
- Variation in how colleges identify and hire adjunct instructors

In the ROI calculation, the \$4,500 estimate was used to represent the cost of covering instruction. This may overestimate costs in departments that cover teaching internally, but it may also underestimate costs when departments incur expenses related to recruiting and hiring adjunct instructors.

Currently, many colleges rely on recent graduate students, current graduate students (at the University of Idaho or Washington State University), postdoctoral scholars, and emeritus faculty to meet adjunct teaching needs.

#### **Q5: How is sabbatical different from professional leave?**

Sabbatical leave and professional leave serve different purposes and operate through different processes.

##### *Sabbatical Leave*

- Requires approval from the dean and a sabbatical leave committee

- Involves peer review of the proposal
- Funded through college-level sabbatical budgets
- Cause for leave must fit one's position description

### *Professional Leave*

- Requires approval from the provost
- Typically funded through department-level resources
- Generally shorter-term opportunities (such as specific training programs or workshops)
- Does not need to be tied directly to activities listed in a faculty member's position description

Professional leave is also used relatively rarely—fewer than one faculty member per year applies for it. Historically, tenured faculty have been able to take professional leave even when instructors were eligible for sabbaticals, and the system functioned without conflict between the two opportunities.

## **Q6: Should access to professional leave be reduced if this proposal passes?**

No. There is no evidence that professional leave is being overused or abused.

Professional leave serves different purposes than sabbatical leave and typically supports short-term professional development opportunities. Maintaining access to both options ensures that faculty have appropriate avenues for different types of development and training.

## **Q7: What impact might expanding sabbatical eligibility have on recruitment?**

Expanding sabbatical eligibility could significantly improve the recruitment of clinical faculty and instructors.

As the university increasingly hires clinical and instructor lines in place of tenure-track positions, recruitment for these roles becomes more challenging. Compensation is already lower relative to tenure-track positions:

- Clinical faculty target salaries are approximately 80% of tenure-track salaries.
- Instructor target salaries are approximately 65% of tenure-track salaries.

In addition to lower salaries, individuals in these positions are excluded from many opportunities at the university, including:

- Serving as Faculty Secretary
- Supervising undergraduate research projects

- Holding certain administrative roles
- Serving as principal investigator on certain grants

Given these existing limitations, providing access to sabbatical leave would represent a meaningful benefit that could improve recruitment and retention.

### **Q8: I heard that instructors used to have sabbaticals. What happened?**

Instructors did previously have access to sabbaticals. However, approximately 15 years ago the university removed tenure from instructor positions. Because the sabbatical policy required tenure for eligibility, instructors consequently lost access to sabbatical leave.

### **Q9: How might this change affect department dynamics?**

Expanding sabbatical eligibility is expected to improve fairness, equity, and access within departments.

Clinical faculty and instructors often contribute significantly to teaching and service, yet currently have fewer opportunities for professional development and institutional participation. Allowing these faculty members access to sabbatical leave helps align opportunities more closely with their contributions.

This change may therefore contribute to stronger morale, improved perceptions of fairness, and greater equity across faculty roles within departments.

## In Workflow

1. Registrar's Office
2. Graduate Council Chair
3. Registrar's Office
4. Ready for UCC
5. UCC
6. Post-UCC Registrar
7. Faculty Senate Chair
8. Catalog Update

## Approval Path

1. Fri, 20 Feb 2026 16:09:48 GMT  
Anna Hall (annahall): Approved for Registrar's Office
2. Thu, 26 Mar 2026 17:02:16 GMT  
Stephanie Thomas (slthomas): Approved for Graduate Council Chair
3. Mon, 30 Mar 2026 16:55:49 GMT  
Anna Hall (annahall): Approved for Registrar's Office
4. Wed, 01 Apr 2026 16:20:42 GMT  
Anna Hall (annahall): Approved for Ready for UCC
5. Tue, 07 Apr 2026 21:57:59 GMT  
Anna Hall (annahall): Approved for UCC
6. Tue, 07 Apr 2026 21:58:26 GMT  
Anna Hall (annahall): Approved for Post-UCC Registrar

## New Proposal

Date Submitted: Fri, 20 Feb 2026 00:43:28 GMT

Viewing: **E-Grades**

Last edit: Tue, 07 Apr 2026 21:57:34 GMT

Changes proposed by: Dwaine Hubbard

### Faculty Contact

Faculty Name	Faculty Email
Lindsey Brown	lindseybrown@uidaho.edu

### Request Type

Add/Drop/Change an academic regulation

**Effective Catalog Year**  
2027-2028

**Title**  
E-Grades

**Request Details**  
This request is to discontinue the IP (in progress) grade.

**Attach State Form**

**Supporting Documents**  
E-Grades.pdf  
E-Grades red line.pdf

**Reviewer Comments**  
**Anna Hall (annahall) (Tue, 07 Apr 2026 21:57:34 GMT):** Passed unanimously at UCC.

Key: 185

## **E - Grades**

### **E-1. Grading System**

#### **E-1-a. Definitions of Grades**

For purposes of reporting and record, academic work is graded as follows:

- A: superior
- B: above average
- C: average
- D: below average
- F: failure
- I: incomplete work of passing quality (see [regulation F](#))
- W: withdrawal
- WA: withdrawal to audit
- WU: withdrawal from the university
- P: pass (see below)
- N: unsatisfactory and must be repeated (used only in [ENGL 1101](#) and [ENGL 1102](#))
- S: satisfactory (used only in CEU courses)
- CR: credit
- NC: no credit (may be used only in professional development courses)

#### **E-1-b. Grades of P**

Grades of P may be reported at the option of the department on a course-by-course basis in noncompetitive courses such as practicum, internship, seminar, and directed study. Grades of P are also reported in courses carrying the statement "Graded P/F" in the course description. In courses in which P's are to be used, the method of grading will be made known to the students at the beginning of the semester, and the grading system will be uniform for all students in the courses. Grades under the pass-fail option are not affected by this regulation because the conversion of the regular letter grade is made by the registrar after instructors turn in the class rosters.

#### **E-1-c. Mid-Semester Grades**

Mid-semester grades in undergraduate courses must also conform to the above regulations. It is permissible to report P's at mid-semester ONLY in courses that have been approved for grading on this basis.

## **E-2. Grades in Law Courses**

For additional provisions applicable to grades in law courses, see the [College of Law](#) section.

## **E-3. Computing Grade-Point Averages**

Grades are converted by assigning the following number of points per credit for each grade: A - 4, B - 3, C - 2, D - 1, and F - 0. In computing the grade-point average, neither credits attempted nor grade points earned are considered for the following: courses graded I, P, S, W, WU, N, CR, NC, non-U of I sponsored independent study courses, continuing education units, credits earned under regulation I, or courses taken at another institution. Credit earned at non-U.S. institutions is recorded as pass (P) or fail (F), except for some courses taken through an approved study abroad program.

The U of I considers only the institutional grade-point average official. Although both institutional and overall grade-point averages are printed on transcripts, the overall grade-point average (which includes transfer courses) is informational only. To calculate a grade-point average, divide the quality points (course credits times the points assigned for the grade earned) by the GPA hours (course credits attempted *not* including grades of I, P, W, WU, or N). "Earned Hours" indicate the total number of semester credits successfully completed (course grades of A, B, C, D, or P earned). Grades of P are included in earned hours but do not earn any quality points; grades of F are included in GPA hours, but not in earned hours.

## **E-4. Replacing Grades**

### **E-4-a. Repeatable Courses**

Some courses are listed in this catalog as "repeatable" (i.e., the credits listed for the courses show a maximum number of credits that may be earned or show "credit arranged" or "max arranged," indicating that the courses may be repeated for credit without restriction as to maximum). Other courses show one credit entry for the course (e.g., "1 credit," "2 credits," etc.) and may be taken only once for credit (see procedure for repeating to replace a grade below). [See the section entitled "[Credit Designations](#)" for more information.]

### **E-4-b. Repeating a Course for Grade and Grade Point Average Improvement**

An undergraduate student may repeat a course for grade and grade point average improvement. Although all grades remain on the record, the highest grade received will be calculated within the student's grade point average and credit earned in the course. Courses taken at other institutions will not qualify for repeat status unless the student can provide the Registrar's Office written proof from the appropriate U of I department that the courses involved were equivalent or the course has already been evaluated by the academic department as equivalent. Enrollment for a repeated course beyond the third attempt requires permission by the student's college.

A graduate student may repeat a course in which a grade of C or lower has been earned only upon specific recommendation by the student's advisory committee and with approval of the major professor. All grades will remain on the student's record. The highest grade earned will be used for grade point average calculation. Enrollment will not be allowed for a third repeat attempt. Courses numbered 5000, 5010, 5020, 5030, 5040, 5970, 5980, 5990, 6000, 6010, 6030, 6040, 6980, and 6990 may be repeated but not for grade replacement.

See the [College of Law](#) section for the exception to this regulation applicable to students in that college.

#### **E-5. Reports of Grades and Grade Corrections**

Grades are reported to the registrar for all courses at the end of each academic session and at mid semester for undergraduate courses (see deadlines in the [academic calendar](#)). The assignment of grades and corrections of grades are the sole prerogative of the instructor and are reported by the instructor directly to the Registrar's Office via the U of I Faculty Web. All grades except I (see [regulation F](#)) are considered final when assigned by an instructor at the end of a term. An instructor may request a grade correction when a computational or procedural error occurred in the original assignment of a grade. No final grade may be revised as a result of re-examination or the submission of additional work after the close of the semester. Grade corrections must be processed within one year of the end of the term for which the original grade was assigned. In the event the instructor leaves the university, the departmental administrator may assign the final grade.

## **E - Grades**

### **E-1. Grading System**

#### **E-1-a. Definitions of Grades**

For purposes of reporting and record, academic work is graded as follows:

- A: superior
- B: above average
- C: average
- D: below average
- F: failure
- I: incomplete work of passing quality (see [regulation F](#))
- W: withdrawal
- WA: withdrawal to audit
- WU: withdrawal from the university
- P: pass (see below)
- ~~IP: in progress (see [E-2](#))~~
- N: unsatisfactory and must be repeated (used only in [ENGL 1101](#) and [ENGL 1102](#))
- S: satisfactory (used only in CEU courses)
- CR: credit
- NC: no credit (may be used only in professional development courses)

#### **E-1-b. Grades of P**

Grades of P may be reported at the option of the department on a course-by-course basis in noncompetitive courses such as practicum, internship, seminar, and directed study. Grades of P are also reported in courses carrying the statement "Graded P/F" in the course description. In courses in which P's are to be used, the method of grading will be made known to the students at the beginning of the semester, and the grading system will be uniform for all students in the courses. Grades under the pass-fail option are not affected by this regulation because the conversion of the regular letter grade is made by the registrar after instructors turn in the class rosters.

### **E-1-c. Mid-Semester Grades**

Mid-semester grades in undergraduate courses must also conform to the above regulations. It is permissible to report P's at mid-semester ONLY in courses that have been approved for grading on this basis.

### **E-2. In-Progress (IP) Grades**

#### **E-2-a. Grades in Undergraduate Senior Thesis or Senior Project**

The grade of IP (in progress) may be used to indicate at least minimally satisfactory progress in undergraduate courses such as senior thesis or senior project that have the statement "May be graded IP" in the course description. When the thesis or project is accepted, the IP grades are to be removed (see E-2-c). Grades of IP in undergraduate courses are considered to represent grades of at least C or P. If, in any given semester, the instructor considers the student's progress unsatisfactory, an appropriate letter grade (D or F) should be assigned for that semester.

#### **E-2-b. Grades in Graduate Research Courses**

The grade of IP (in progress) may be used in courses 5000 (Master's Research and Thesis), 5990 (Non-thesis Master's Research), and 6000 (Doctoral Research and Dissertation). When the thesis, dissertation, or other research document is accepted, or when a student ceases to work under the faculty member who is supervising their research, the IP grades are to be removed (see below). Grades of IP in graduate courses are considered to represent at least grades of B or P. If, in any given semester, the faculty member supervising the student's research considers the student's progress unsatisfactory, a regular letter grade (C, D, or F) should be assigned.

#### **E-2-c. Removal of IP Grades**

Departments may use on a department-wide basis either the Pass/Fail grading system or regular letter grades, as well as P, when removing the previously assigned IP grades (e.g., a student who enrolled for six credits in course 5000 one semester, four credits another semester, and five credits an additional semester could have 15 credits of IP grades removed with different grades for each of the blocks of credit registered for each semester, such as six credits of A, four credits of B, and five credits of P).

### **E-3.2. Grades in Law Courses**

For additional provisions applicable to grades in law courses, see the [College of Law](#) section.

### **E-4.3. Computing Grade-Point Averages**

Grades are converted by assigning the following number of points per credit for each grade: A - 4, B - 3, C - 2, D - 1, and F - 0. In computing the grade-point average, neither credits attempted nor grade points earned are considered for the following: courses graded I, ~~HP~~, P, S, W, WU, N, CR, NC, non-U of I sponsored independent study courses, continuing education units, credits earned under regulation I, or courses taken at another institution. Credit earned at non-U.S. institutions is recorded as pass (P) or fail (F), except for some courses taken through an approved study abroad program.

The U of I considers only the institutional grade-point average official. Although both institutional and overall grade-point averages are printed on transcripts, the overall grade-point average (which includes transfer courses) is informational only. To calculate a grade-point average, divide the quality points (course credits times the points assigned for the grade earned) by the GPA hours (course credits attempted *not* including grades of I, ~~HP~~, P, W, WU, or N). "Earned Hours" indicate the total number of semester credits successfully completed (course grades of A, B, C, D, or P earned). Grades of P are included in earned hours but do not earn any quality points; grades of F are included in GPA hours, but not in earned hours.

## **E-54. Replacing Grades**

### **E-54-a. Repeatable Courses**

Some courses are listed in this catalog as "repeatable" (i.e., the credits listed for the courses show a maximum number of credits that may be earned or show "credit arranged" or "max arranged," indicating that the courses may be repeated for credit without restriction as to maximum). Other courses show one credit entry for the course (e.g., "1 credit," "2 credits," etc.) and may be taken only once for credit (see procedure for repeating to replace a grade below). [See the section entitled "[Credit Designations](#)" for more information.]

### **E-54-b. Repeating a Course for Grade and Grade Point Average Improvement**

An undergraduate student may repeat a course for grade and grade point average improvement. Although all grades remain on the record, the highest grade received will be calculated within the student's grade point average and credit earned in the course. Courses taken at other institutions will not qualify for repeat status unless the student can provide the Registrar's Office written proof from the appropriate U of I department that the courses involved were equivalent or the course has already been evaluated by the academic department as equivalent. Enrollment for a repeated course beyond the third attempt requires permission by the student's college.

A graduate student may repeat a course in which a grade of C or lower has been earned only upon specific recommendation by the student's advisory committee and with

approval of the major professor. All grades will remain on the student's record. The highest grade earned will be used for grade point average calculation. Enrollment will not be allowed for a third repeat attempt. Courses numbered 5000, 5010, 5020, 5030, 5040, 5970, 5980, 5990, 6000, 6010, 6030, 6040, ~~and 6980~~, ~~and 6990~~ may be repeated but not for grade replacement.

See the [College of Law](#) section for the exception to this regulation applicable to students in that college.

### **E-65. Reports of Grades and Grade Corrections**

Grades are reported to the registrar for all courses at the end of each academic session and at mid semester for undergraduate courses (see deadlines in the [academic calendar](#)). The assignment of grades and corrections of grades are the sole prerogative of the instructor and are reported by the instructor directly to the Registrar's Office via the U of I Faculty Web. All grades except I ~~and P~~ (see [regulation F and E-2](#)) are considered final when assigned by an instructor at the end of a term. An instructor may request a grade correction when a computational or procedural error occurred in the original assignment of a grade. No final grade may be revised as a result of re-examination or the submission of additional work after the close of the semester. Grade corrections must be processed within one year of the end of the term for which the original grade was assigned. In the event the instructor leaves the university, the departmental administrator may assign the final grade.



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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: **40.03 New and Major Renovation Building Policy**

\*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:**

**Policy Sponsor, if different from Originator:**

Reviewed by General Counsel  Yes  No Name & Date: Kim Rytter

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

This policy was interim approved in Sept 22, 2025 for updates to new APM format. This is to formalize the approval. Attached redline represents the changes receiving interim approval.

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.

N/A

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.

July 1, 2026

## **APM 40.03 – New and Major Renovation Building Policy**

~~Created January 23, 2008~~ **Owner:**

- **Position:** Senior AVP Finance & Planning, Division of Finance & Administration
- **Email:** [vpfinance@uidaho.edu](mailto:vpfinance@uidaho.edu)

**Last updated: Interim Approval Sept 22, 2025**

### **A. Purpose.** ~~2008~~

*Preamble:* The responsible use of all forms of energy and the good health of the University of Idaho and local communities are high priorities ~~of~~ the University of Idaho, which is committed to environmental, economic, and social sustainability. This policy furthers these priorities by developing sustainable building standards for new buildings and major ~~building~~-renovation projects. - Sustainable building standards will yield cost savings through reduced operating costs; help to provide a healthy and productive environment for students, faculty, staff, and visitors; and contribute to the University's goals of protecting, conserving, and enhancing the region's and State's environmental resources. -For further information, contact Architectural and Engineering Services at 885-6246.

**B. Scope.** This policy applies to all new buildings and major renovations of existing buildings and facilities under the purview of the Regents, University of Idaho. This includes buildings and facilities located on the main campus of the university in Moscow, Idaho, as well as at all centers and locations statewide. This policy applies to all University divisions, departments, offices, and their contractors responsible for financing, planning, designing, developing, constructing, renovating, and managing University-owned facilities and buildings, regardless of location. Where other state agencies (e.g., Division of Public Works or Idaho State Building Authority) have responsibility for delivering the construction or renovation project, the

~~A.~~—University will strive to work with the agency in developing and delivering a project meeting the standards outlined above.

### **C. Definitions.**

**AC-1. LEED:**—Leadership in Energy and Environmental Design developed by the U.S. Green Building Council. - The LEED Green Building Rating System is the national benchmark for high performance green buildings. -Current rating systems and resources can be found at <http://www.leedbuilding.org/>. U.S. Green Building Council.

### **D. B.**—**Policy.**

**BD-1. -General.** -It is the policy of the University to finance, plan, design, construct, manage, renovate, and maintain its facilities in a sustainable fashion. -While construction of sustainable buildings potentially incurs additional ~~first~~initial costs – both in terms of design fees and construction costs, - sustainable buildings have reduced operating costs. The University recognizes that investments in sustainable building usually have short payback periods and yield substantial savings over the life cycle of the completed facility.

**BD-2. -Sustainable Building Standard.** -All new construction and major ~~remodels~~renovations (in excess of 50% of state replacement value) shall be certified as meeting or exceeding a ~~LEED~~ Silver-~~LEED~~ rating or equivalent according to the latest edition of the US Green Building Council's LEED rating system and accompanying Reference Guide. -Design and project management teams are encouraged to meet higher LEED rating levels such as Gold or Platinum. -Use of an alternative green building standard is allowed ~~as long as if~~ a clear rationale is provided as to why the alternative standard should be considered equivalent or superior to LEED Silver or Gold. ~~Particular emphasis should~~Emphasis will be placed on achieving ~~the~~ LEED points related to optimizing energy performance, advanced commissioning, and measurement and verification while advancing the mission of the building, the campus, and the University.

~~**BD-3. Responsibility.** This policy applies to all university divisions, departments, offices and their contractors responsible for financing, planning, designing, developing, constructing, renovating and managing University owned facilities and buildings, regardless of location. Where other state agencies (e.g., Division of Public Works or Idaho State Building Authority) have responsibility for delivering the construction or renovation project, the university will strive to work with the agency in developing and delivering a project meeting the standards outlined above.~~

**B-4.-Exemptions.** -Buildings ~~whose~~for which the primary use is ~~for~~ agricultural or machinery storage, animal shelters, and similar ~~functional and pragmatic~~ uses are exempt from this policy until a LEED rating system is designed suitable to these types of structures.

## **E. Contact Information**

- Position: SAVP Finance & Planning, Division of Finance & Administration
- Email: [vpfinance@uidaho.edu](mailto:vpfinance@uidaho.edu)

## **F. Related Policies**

**F-1.** All new buildings and major renovations of existing buildings and facilities projects shall comply with the requirements of Board of Regents Policy V.K. – Construction Projects.

**F-2. University of Idaho policies related to Capital Planning and Design include:**

- APM 40.05 Architectural & Engineering Services
  - APM 40.06 Privately Funded Capital Projects
  - APM 40.07 Facility Maintenance Endowment
  - APM 40.08 Donated Services or Materials
- 

**Version History**

2008



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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: **40.10 University Space**

\*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:**

**Policy Sponsor, if different from Originator:**

Reviewed by General Counsel  Yes  No

Name & Date: Kim Rytter

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

This policy was interim approved in Sept 22, 2025 for updates to new APM format. This is to formalize the approval. Attached redline represents the changes receiving interim approval.

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.

N/A

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.

July 1, 2026

## **APM 40.10 – University Space**

~~Updated March 22, 2017~~

### **~~A. Definitions~~**

#### **~~A Owner:~~**

- ~~**Position:** Senior AVP Finance & Planning, Division of Finance & Administration~~
- ~~**Email:** vpfinance@uidaho.edu~~

~~**Last updated:** edit~~

~~**A. Purpose.** This policy governs the allocation of space Units and subdivisions of the University. This includes how space is allocated in fulfillment of the strategic mission of the University, the process for request for space from the Units, the process governing consideration of such space requests, the process for strategic reallocation, and the process for final resolution of space and institutional space needs.~~

~~**B. Scope.** This policy applies to all space, facilities and space within facilities under the purview of the Regents, University of Idaho, to include buildings and facilities located on the main campus of the University in Moscow, Idaho, as well as at all centers and locations statewide. This policy applies to all University Units seeking to occupy space at such facilities in fulfillment of their role and missions in accordance with the University's overall role, mission, and strategic objectives.~~

### **~~C. Definitions.~~**

~~**C-1. Unit:** refers to primary management ~~units~~Units within the University ~~of Idaho~~ (University), including recognized colleges, administrative ~~units~~Units, and recognized University Centers located remotely from the main Moscow campus. ~~{rev. 3-17}~~.~~

~~**AC-2. President:** refers to the President of the University of Idaho, or ~~his/her~~their designee, having final authority over space policies, procedures, and allocations at ~~university~~University sites statewide. ~~{add. 3-17}~~.~~

~~**AC-3. Space Advisory Council (SAC).** The SAC is a group established with the goal of providing advisory input regarding the development and implementation of University of Idaho space related policies and processes and to serve as an impartial reviewer for resolution of space issues not resolved through the routine policies and processes. SAC membership will be determined by the President and will normally include representative~~

stakeholders from entities such as Executive leadership, Staff Council, Faculty Senate, ASUI, and Facilities. ~~[add. 3-17]~~

## **BD. Policy**

~~**B-1. Policy Statement.**~~ All University owned or operated buildings, space, and land, regardless of fund source or location, or use by a particular Unit, are assets of the University as a whole, and are subject to assignment or reassignment to meet the overall needs and best interest of the University. -Long-range planning for optimum use of these valuable University assets is a continuing process.- Policies and procedures that guide space assignment and reassignment are the responsibility of the President. -Unless otherwise specified by the President, space assigned to a Unit may be reassigned by the Unit leader or reallocated within and among internal divisions or departments of the Unit to meet its goals and purposes, consistent with accreditation needs of the University and University space and facilities policies. -Any reassignment of space between one Unit and another is subject to prior approval by the President and may necessitate input from the SAC. ~~[rev. 3-17]~~

In the event University controlled space is inadequate or unavailable, University program space needs may be addressed through leasing property not owned or otherwise controlled by the University. All lease agreements must be signed by the Vice President for Infrastructure or designee, and where required, must be authorized by the Board of Regents for the University prior to execution.- Prior to submission to the Vice President or Board of Regents, the University Real Estate Officer is assigned responsibility to review, process, and coordinate all University leasing activity and ensure adequacy of leasing terms and compliance with University policies.- Proposals for leasing must be consistent with University program priorities and budgetary confirmation of the financially responsible party within the University, and shall be approved by the responsible Unit administrator (e.g. dean, appropriate VP) prior to initiation of lease negotiations by the Real Estate Officer. ~~[rev. 3-17]~~

Assignment of campus space is documented and maintained by the Facilities department. Units are to notify Facilities when changing space allocation ~~and/or~~ room uses within the Unit and complete an annual space audit to confirm space allocation and room usage. ~~[add. 3-17]~~

## **C. Procedure.**

~~**C-1. Requesting Campus Space.** Units desiring additional existing University space are to complete and submit a University Space Request Form, found at <http://www.uidaho.edu/infrastructure/facilities/aes>. [ed. 3-17]~~

## **E. Procedures.**

**E-1. Requests for Campus Space.** A&E Services offers University Units assistance with space planning, utilization, and assignment. The management, allocation, and assignment of University space resources is governed by the University of Idaho Space Policy as defined herein. Units wishing to explore requests for additional space as a result of changing Unit needs should begin by completing and submitting a University Space Request Form, found at <http://www.uidaho.edu/infrastructure/facilities/aes> or by contacting the University Space Planner within A&E Services at 208-885-6246.

**E-2. Reporting of Changes in Space Use, Assignment, or Allocation.** A & E Services maintains a database of all University Space, its functional use, assignment and allocation. Units which reallocate or reassign space internally within the Unit, or which negotiate a swap of space use and assignment with other Units, or which are in position to relinquish space previously assigned to the Unit, shall report all such changes in space use, assignment or allocation to the University Space Planner at 208-885-6246 for the purpose of maintaining and keeping current the accuracy of the database

## **F. Contact Information.**

- **Position:** SAVP Finance & Planning, Division of Finance & Administration
- **Email:** [vpfinance@uidaho.edu](mailto:vpfinance@uidaho.edu)

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## **Version History**



## POLICY COVER SHEET

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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: **40.12 Sustainability Revolving Loan Fund**

\*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:

### Policy Sponsor, if different from Originator:

Reviewed by General Counsel  Yes  No

Name & Date: Kim Rytter

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

This policy was interim approved in Sept 22, 2025 with a change to shorten the repayment window and to shift in program ownership from Facilities/Infrastructure to Sustainability; otherwise was format update. Attached redline represents the changes receiving interim approval. This is to formalize the approval.

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.

N/A

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.

July 1, 2026

## APM 40.12 – Sustainability Revolving Loan Fund

### Owner:

- **Position:** Director, [FacilitiesSustainability](#)
- **Email:** [facilitiesuofi-sustainability@uidaho.edu](mailto:facilitiesuofi-sustainability@uidaho.edu)

**Last updated:** ~~November 01, 2017~~ [March 31, 2025](#)

**A. ~~General Purpose.~~** The University of Idaho Sustainability Revolving Loan Fund (SRLF) funds innovative projects that reduce environmental impacts and provide economic benefits. The SRLF may fund energy conservation, renewable energy, waste and recycling and other sustainability projects that demonstrate sustainable design and that save money. Savings resulting from a SRLF funded project shall be used to repay the loan from the SRLF. The SRLF shall serve as a source of money from which loans may be made for projects; as repayments are made, the money is made available for additional projects.

The SRLF has several goals:

1. To foster sustainable design and environmentally sound technologies and practices at UI-owned facilities.
2. To reduce risk and budget shortfalls associated with rapidly rising energy, waste and other costs.
3. To educate and inspire UI students, staff and faculty about the cost-effectiveness of sustainable practices.
- 3.4. To create opportunities to use our campus as a living laboratory for students studying sustainability issues.
- 4.5. To serve as a role model to other state and national organizations in environmental and fiscal responsibility.
- 5.6. To maintain itself financially into the foreseeable future without compromising—and supporting when possible—student, community and institutional initiatives for a socially and environmentally just and sustainable world.

**B. Scope.** Any university employee may apply for funding through the SRLF.

**C. Definitions.** None.

**DCB. Applicability Policy.**

**DC-1. Project types.** Funded projects can be of any type as long as they advance the effort to increase the sustainability of University of Idaho operations, and are for uses consistent with permissible uses of public funds. Several projects with different payoff periods and rates can be bundled in one proposal. This will enable projects with short-term payoffs to offset projects with long-term payoffs for an average that meets SRLF criteria. Funds can be used on new construction and renovation only to cover the cost difference between a code-compliant option and a high-performance option.

**DC-2. Project durations.** Projects need to be paid off in 10-5 years or less. Several projects with different payoff periods and rates can be bundled in one proposal. This will enable projects with short-term payoffs to offset projects with long-term payoffs for an average that meets SRLF criteria. Funds can be used on new construction and renovation only to cover the cost difference between a code-compliant option and a high performance option.

### **EDC. Procedures.**

**EG-D-1. Allocation of savings.** After receiving startup funding, the SRLF will be self-sustaining. The intent is to grow the SRLF over time using the cost savings accrued from sustainability projects. Many formulas for allocation of savings and repayment are possible and will be considered. Example formulas include the following:

- a. 80% of estimated savings paid to SRLF until 120% of loan is covered, adjusted for inflation, for projects with payback of 2 years or less.
- b. 50% of estimated savings paid to SRLF until 150% of loan is covered, adjusted for inflation, for projects with payback of >2 to 5 years.

To be funded, projects need to explicitly state the repayment formula and the budget(s) from which loan repayment is to be made as well as the mechanism for repayment. Projects providing shorter payback periods and higher repayment percentages will be prioritized.

### **EDC-2. Award decision making process.**

a. SRLF project proposals shall be reviewed by the SRLF Board ("Board"), which shall make funding recommendations to the Vice President for Infrastructure University Sustainability Director. Board members, other than ex-officio members, shall be appointed by the Vice President for Infrastructure University Sustainability Director to three year~~three-year~~ terms. The Board shall consist of the Sustainability Manager, the Associate Vice President for Operations, and one representative from each of the following entities on campus: Architectural and Engineering Services facilities, ASUI, staff affairs, students, and faculty.

The UISC Student Programs Coordinator shall be an ex officio board member with full voting privileges. The Sustainability Coordinator and the university Senior Budget Analyst shall be non-voting ex officio members. [rev. 7-16, ed. 11-17]

**b.** Board decisions will be made by majority vote, with a quorum present. Projects may only be funded in response to a request for proposals (RFP) issued by the Board. The Board shall issue an RFP at least once per year. The Board will determine which projects to recommend for funding based on the criteria in this policy and any additional criteria it establishes and includes in the RFP. The Board shall forward its recommendations for project funding to the ~~Vice President for Infrastructure~~ University Sustainability Director or designee, who shall have final funding decision-making authority. [ed. 11-17]

**c.** ~~The U~~ Sustainability ~~Coordinator~~ Manager will be responsible for managing the issuance of the RFP, collecting proposals, staffing the Board, notifying applicants of award decisions, and otherwise providing administrative support to the Board.

**EDG-3. Administration of SRLF.** The SRLF will be administered by the ~~Assistant Vice President for Facilities Management~~ University Sustainability Director, or designee, subject to the University's policies ~~and the general oversight of Vice President for Infrastructure~~. [rev. 7-16]

**FE. Contact Information.** The Office of Sustainability is the primary resource center for the policy and is available to answer specific questions.  
<https://www.uidaho.edu/sustainability>

**G. Forms.** None.

**H. Related Policies.** None.

## Version History



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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's Chapter 60 – Purchasing APM 60.03; 60.10; 60.11; 60.13; 60.14

\*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: Robert Akhnoukh

Policy Sponsor, if different from Originator: Brian Foisy

Reviewed by General Counsel  Yes  No

Name & Date: Edith Pacillo

- Policy/Procedure Statement:** Briefly explain the reason for the proposed addition, revision, and/or deletion.  
Review and update of policy was recommended by Internal Audit findings in June 2024. Formatting Updates, Removal of defunct policies since the introduction of JAGGAER and language updates are the majority of requested changes. Some contain increases to established thresholds in the process. Policy updates are primarily formatting changes, removal of old policy no longer applicable and delegated review & signature authority changes/updates to address organizational structure changes. Policy updates have been fully reviewed by Brian Foisy - DFA VP, Edith Pacillo – OGC, Robert Akhnoukh – Director, Contracts and Purchasing Services.
- Fiscal Impact:** What fiscal impact, if any, will this addition, revision, or deletion have? NA
- Related Policies/Procedures:** Describe other UI policies or procedures related or similar to this proposed change, or that will be impacted by it. N/A
- 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. January 1, 2026 or ASAP.

## 60.03 -- General Responsibilities within Purchasing Services

~~July 30, 2009~~

### Owner:

- **Position:** Purchasing Services Director
- **Email:** purchasing@uidaho.edu

**Last updated:** ~~July, 30, 2005~~ July 2026

A. **General.** Outlined below are the responsibilities, duties and required approvals of UI Purchasing Services and employees involved in and related to the University's purchasing process for goods and services.

B. **Procedure.** It shall be the responsibility of requesting units to ensure that all requisitions are properly entered on the University's [administrative E-procurement System\(JAGGAER\) computer system \(Banner\)](#) in order to secure necessary approvals and initiate Purchasing Services' process of purchasing goods or services. *[ed. 7-09]*

B-1. **Ensure Fund Availability.** It shall be the responsibility of the requesting unit to determine and ensure funds are available and properly budgeted for any proposed purchase. *[ed. 7-09]*

B-2. **Ensure Proper Accounting Codes.** It shall be the responsibility of the requesting unit to specify  [& review](#) the proper accounting codes for all proposed purchases. ~~Requisitions will be reviewed by Purchasing Services to verify budget and accounting codes. Any changes will be communicated directly to the requester.~~ *[ed. 7-09]*

B-3. **Develop Proper Specifications.** It shall be the responsibility of the requesting unit to develop specifications in accordance with these policies. Specifications are subject to review and approval by Purchasing Services [See [60.46](#)]. *[ed. 7-09]*

B-4. **Monitor Vendor Performance.** It shall be the responsibility of the requesting unit to monitor contractor performance, progress reports as required and payment requests. *[ed. 7-09]*

B-5. **Waivers Approved.** It shall be the responsibility of Purchasing Services to document and justify any special circumstances that limit or restrict competition, or require procedures other than those set forth in these policies.

B-6. **Contractual Obligations.** Purchasing Services shall be responsible for developing and updating standard contractual provisions and forms related to the purchasing function and for determining contract terms and conditions. Changes in standard contract terms and conditions require review and approval of General Counsel. *[ed. 7-09]*

**B-7. Processing Purchase Transactions.** Purchasing Services shall be responsible for the issuance of all purchase orders exceeding \$510,000 and the signing of select contracts [See 60.20]. Purchasing Services has delegated authority to units for processing purchase transactions for goods and materials limited to no more than \$510,000 through either the use of Purchase Orders [See 75.32] or the use of a University Purchasing Card [See 75.37]. All service contracts must be routed through Purchasing Services for administrative approval and signature. [*ed. 7-07, rev. 7-09.*]

**B-8. Competitive Bid Process.** Purchasing Services shall be responsible for the solicitation and opening of Requests for Bids and Requests for Proposals in accordance with these policies. Purchasing Services, with concurrence from the requesting unit, shall be responsible for analyzing such bids or proposals for compliance with the specifications and for determining compliance with all other requirements of the Request for Bids or Proposals. [*ed. 7-09*]

**B-9. Bid Protest Resolution.** All bid protests require resolution by the Director of Contracts and Purchasing Services. [*ed. 7-09*]

**B-10. Debarment, Suspension and Exclusion.** Purchasing Services shall be responsible to ensure compliance of all procurements over \$25,000 with (E.O.) 12549. [*add. 7-09*]

**B-11. Documentation.** Purchasing Services shall maintain documentation related to all aspects of purchases utilizing a competitive process. Such documentation shall be available for public inspection upon request (Public Records Requests). [*ren. 7-09*]

### Version History

2026 – Minor amendments to clarify the existing policy without changing its core intent. Increase to established thresholds in B-7, B-10

2009 – Amended to clarify the delegated authority granted to departments is limited to goods and add that service agreements must be routed through Purchasing. Adds language indicating that Purchasing Services is responsible for compliance to Federal debarment requirements.

2005 – Minor amendments to language.

## 60.10 -- Requests for Quotations (RFQs)

~~Last updated August 23, 2005~~ November 5, 2007

### Owner:

- Position: Purchasing Services Director
- Email: purchasing@uidaho.edu

Last updated: November 5, 2007 July, 2026

A. **General.** The issuance of Requests for Quotations (RFQ) is a method of soliciting offers from vendors in order to establish pricing, specification or performance standards, and the terms and conditions for the purchase of goods or services. [rev. 11-07]

B. **Procedure.** For purchases totaling no more than \$~~50,000~~100,000 per order, a RFQ may be used, ~~either~~ by Purchasing Services ~~or by the department itself~~. To the extent possible, quotations must be solicited from a minimum of three responsible and responsive vendors in a fair and ethical process.

#### **B-1. Quotation Solicitation. Such RFQs shall include:**

- ia) Clearly defined specifications for the purchase of goods or a complete statement of work to be performed for the purchase of services.
- iib) University's General Terms and Conditions [See 60.06].
- iiic) Required delivery or completion schedule.
- ivd) Any other provisions, procedures, or statement, as deemed necessary by the Purchasing Services' Manager.
- ve) RFQs shall allow sufficient time, as deemed appropriate by the Buyer, to permit prospective vendors to prepare and submit RFQ responses.

**B-2. Standard Specifications.** Specifications contained in the RFQ will, where practical, be non-restrictive so as to provide an equal basis for competition and participation by an optimum number of qualified vendors. Unless otherwise stated, reference to any equipment, materials or supplies by trade name, make, or catalog number shall be regarded as establishing a standard of quality and shall not be construed as limiting competition. The final decision as to whether an item is an equivalent or a satisfactory alternate shall rest with Purchasing Services [See 60.46].

**B-3. Opening of Quotes.** RFQs are not required to be sealed and are not opened in a public manner. RFQ responses are generally opened and recorded as they are received. Vendor responses should be received prior to designated opening date and time in order to be considered.

**B-4. Evaluation of Quotes.** Award should be made to the lowest responsive, responsible vendor whose offering meets the following criteria:

i) The lowest price.

ii) Conformity to the specifications or minimum acceptable requirements of the RFQ.

iii) Agreement to the University's terms and conditions as described within the RFQ.

iv) Such other information as may be secured having a bearing on the decision to award the contract.

**B-5. Quotation Solicitation Records.** For each RFQ issued by UI, Purchasing Services shall retain a record which should include a copy of the RFQ, a list of all vendors receiving the RFQ, all vendor responses, and any other information prepared or received during the quotation process. This record shall be available for public inspection.

**C. Award of Contract.** The contract will be awarded on the basis of the best vendor response to the RFQ as defined in these policies, or as Purchasing Services' Manager may determine to be in the best interests of UI.

~~D. Sample Request for Quotations (RFQ) Form.~~

~~{See~~

~~[www.purchasing.uidaho.edu/documents/Departmental%20RFQ.pdf&pid=75981&doc=1http://www.its.uidaho.edu/purchasing/forms.htm](http://www.purchasing.uidaho.edu/documents/Departmental%20RFQ.pdf&pid=75981&doc=1http://www.its.uidaho.edu/purchasing/forms.htm)]~~

[Version History](#)

[2026 - Amendments to clarify the existing policy and an increase to established threshold in B; review recommended by internal audit.](#)

[2007 - Added specificity regarding Requests for Quotations](#)

[2005](#)

## 60.11 -- Requests for Bids (RFBs) ~~Last updated November 5, 2007~~

### Owner:

- Position: Purchasing Services Director
- Email: [purchasing@uidaho.edu](mailto:purchasing@uidaho.edu)

Last updated: ~~November 5, 2007~~ July, 2026

A. **General.** The issuance of Requests for Bids (RFB) is a method of soliciting offers from vendors in a sealed process in order to establish pricing, specification or performance standards, and the terms and conditions for the purchase of goods and services. [rev. 11-07]

B. **Procedure.** For purchases totaling more than \$~~50,000~~100,000 per order, a RFB must be used. Purchasing Services has the sole responsibility for issuing RFBs. To the extent possible, quotations must be solicited from a minimum of three responsible and responsive vendors in a fair and ethical process. Vendor's responses to RFB's must be made on the University's bid form and must be completed, executed, and submitted in accordance with the instructions of the bid document.

B-1. **Solicitation of Bids.** Purchasing Services shall ensure adequate RFBs are prepared which clearly define the goods or services needed in order for bidders to properly respond to the request. Such RFBs shall include:

- a) Clearly defined specifications for the purchase of goods or a statement of work to be performed for the purchase of services.
- b) University's General Terms and Conditions [See 60.06].
- c) Required delivery or completion schedule.
- d) Any solicitation statements required by state or federal agencies.
- e) Any other provisions, procedures, or statements, as deemed necessary by Purchasing Services.

B-2. **Standard Specifications.** Specifications contained in the RFB will, where practical, be non-restrictive so as to provide an equal basis for competition and participation by an optimum number of qualified bidders. Unless otherwise stated, reference to any equipment, material or supplies by trade name, make, or catalog number shall be regarded as establishing a standard of quality and shall not be construed as limiting competition. The final decision as to whether an item is an equivalent or a satisfactory alternate shall rest with Purchasing Services [See 60.46].

- a) RFB Timing. RFBs shall allow sufficient time (no less than ten (10) calendar days) to permit prospective bidders to prepare and submit bids.

**B-3. Addendums to RFBs.** If, after the issuance of a RFB, but before the time set for submitting bids, it is necessary to amend any part of the RFB, such information shall be sent to each firm to whom a RFB has been furnished in the form of an addendum with sufficient time to permit all prospective bidders to consider such information in submitting or modifying their bids. In addition, any information given to a prospective bidder concerning a RFB must be furnished promptly to all other prospective bidders, as an addendum to the RFB, if such information is necessary to bidders in submitting bids.

**B-4. Late Bids.** Bids that do not arrive in time for a bid opening will not be considered and will be returned to the sender, unopened, with a letter explaining that the bid response was received too late for consideration.

**B-5. Bid Modification or Withdrawal.** Bids may be modified or withdrawn by written notice received in Purchasing Services no later than the exact time set for submittal. Any modification or request for withdrawal of bids received after the stated bid submittal time will not be considered.

**B-6. Opening of Bids.** At the place, date and time set forth in the RFB, all bids received in accordance with the bid submittal requirements in the RFB shall be publicly opened and read aloud to those persons present by the Buyer.

**B-7. Evaluation of Bids.** Award should be made to the lowest responsive, responsible vendor whose offering meets the following criteria:

- a) The lowest price.
- b) Conformity to the specifications or minimum acceptable requirements of the RFB.
- c) Agreement to the University's terms and conditions as described within the RFB.
- d) The ability, capacity, and skill of the vendor to perform the contract or provide the service required.
- e) Ability of the vendor to perform contractual obligations within the time specified.
- f) The vendor's compliance with laws relating to the contract for the goods or services.
- g) Such other information as may be secured having a bearing on the decision to award the contract.
- h) Bidders may be requested to furnish to the Purchasing Services' Manager acceptable evidence of their ability to perform, such as firm commitments by subcontractors, equipment, supplies and facilities, and to show their ability to obtain the necessary personnel.

**B-8. Rejection of Bids.** The UI reserves the right to accept or reject bids on each item separately or as a whole, to reject any or all bids, to waive irregularities or informalities and to contract in the best interest of the University.

**B-9. Bid Review Memo.** It is the Buyer's responsibility to evaluate all bids received and to determine the apparent successful bidder. A bid review memo shall be completed and sent to the requester as a method of advising them of the status of their request as well as to solicit their concurrence with the Buyer's bid evaluation. In addition, if an additional technical evaluation is required, the bid review memo provides the requester the opportunity to assist in the evaluation of the bids.

**B-10. Bid Solicitation Records.** For each RFB issued by UI, Purchasing Services shall retain a record which should include a copy of the RFB, a list of all vendors who received the RFB, all vendor responses, and any other information prepared or received during the bid process. This record shall be available for public inspection.

C. **Electronic Commerce.** The use of electronic solicitation of bids may be used in circumstances that provide an open and fair competitive market. Purchasing Services' Manager may apply the use of such techniques as reverse auction, electronic posting, or electronic advertisement of solicitations as appropriate to the buying situation. *[add. 11-07]*

D. **Award Basis.** The contract will be awarded on the basis of the best bid as defined in these Policies, or as Purchasing Services' Manager may determine to be in the best interests of the University. ~~Award of contracts in excess of \$250,000 may require the review and approval of the Executive Director of the Board of Regents or the Board of Regents itself~~ Certain contracts may require Board of Regents approval, in accordance with SBOE policy as amended from time to time. [See 60.20]. *[ren. 11-07]*

#### Version History

2026 – Updates following review as recommended by internal audit. Increase threshold for bid requirement in B.

2007 – Revise language around procedures to improve clarity of specifications.

2005

**60.13 – Waiver of Competitive Bid Process (~~formerly Sole Source Procurements~~)**  
**~~June 9, 2015~~**

**Owner:**

- **Position: Purchasing Services Director**
- **Email: [purchasing@uidaho.edu](mailto:purchasing@uidaho.edu)**

**Last updated:** ~~June 9, 2015~~ July, 2026

**A. General.** Purchases exceeding the competitive bid threshold (see APM 60.02) shall be made in a manner that provides maximum practicable open and free competition appropriate to the type of product or service to be provided. A preference for a particular proprietary item does not justify a waiver of the bid requirements if there is more than one potential source for that item. *[rev. 1-10, 4-11, 6-15]*

The following are non-exhaustive examples of circumstances that may justify waiving the competitive bid process: *[rev. 4-11]*

- Spare parts or replacement parts for existing equipment where proprietary items can only be acquired from the manufacturer or from a single distributor.
- Property rights of a company for an item or service that make a mandatory critical feature non-competitive. *[add. 1-10]*
- Routine expenses such as utility charges. *[rev. 1-10]*
- Compatibility of equipment or accessories is the paramount consideration.
- Equipment is experimental or developmental. *[rev. 1-10]*

**B. Procedure.** The determination to waive the competitive bid process may be made only by the Director of Contracts and Purchasing Services (CPS). Any request by a unit to restrict a purchase to one potential supplier must be accompanied by an explanation as to why no other item or vendor is suitable or a statement that no other vendor exists to meet the need. ~~Request should be submitted on the current bid waiver request form found on the CPS website.~~ *[rev. 1-10, 4-11, 6-15]*

~~Pursuant to Idaho Code 67-5720(2)9225, w~~When there is only one (1) vendor for the property to be acquired, unless the property is required for a life-threatening situation or a situation that is immediately detrimental to the public welfare or property, notice of a bid waiver procurement shall be published on the CPS [website](#) for a period of ~~seven~~five (75) business days. *[add. 6-15]*

**C. Exceptions to Competitive Bid Requirements.** The following are exempt from competitive bid requirements:

- Goods purchased for the sole purpose of resale in retail operations, such as, the Bookstore or Golf Pro Shop;
- Products manufactured by, or services provided by, Rehabilitation Facilities (as defined in APM 60.51) that satisfy the requirements of APM 60.51 Section B; and *[add. 2-12]*
- Publications, periodicals, manuscripts or other goods in either hard copy or electronic format purchased for Library collections.
- Sequencing and analysis services for the continuation of research.
- Hotel room block agreements.
- Software Renewals.
- Repair and Maintenance agreement renewals.
- Blanket Orders not to exceed \$50,000 per fiscal year.
- Performing Artists/Speakers
- Curriculum
- Herd Animals
- **External Legal Counsel (Office of the General Counsel)**

These procurements are still subject to applicable laws, regulations, and Board of Regents policies. Materials, supplies, services or goods required to maintain operations in these service facilities must continue to follow competitive acquisition policies. *[add. 4-11]*

**D. Information.** CPS shall conduct negotiations, determine price, availability, and terms for purchases exceeding the competitive bid threshold (see APM 60.02). Sole source letters alone from vendors are not accepted as an exception to the competitive bid process. For further information on the process to waive competitive bidding, call CPS at (208) 885-6116. *[rev. 1-10, ren. & rev. 4-11, ed. 6-15]*

#### Version History

July, 2026 - Minor amendments to clarify the existing policy without changing its core intent or requirements; recommended by internal audit. Addition to exception items list and sole source letter clarification.

2015 - Update to existing policy to require electronic notice of bid waiver purchases on the Office of Contracts and Purchasing's website, which makes the current policy consistent with both Regents policy and state law.

2012 - Establishes the competitive exemption (as practiced) for retail operations and Library collections.

2010 - This addition adds language in the example section to provide competitive exceptions for copy write protection or patents which are a critical feature in an item to be purchased.

2005

## 60.14 – Direct Negotiations

~~Last updated August 24, 2005~~

### Owner:

- Position: Purchasing Services Director
- Email: [purchasing@uidaho.edu](mailto:purchasing@uidaho.edu)

~~Last updated: August 24, 2005~~ July, 2026

A. **General.** In lieu of competitive bidding, negotiations may be conducted whenever any of the following conditions are applicable:

- The public good, as determined by Purchasing Services' Manager, will not permit the competitive bid process due to time constraints.
- It is impractical to secure competition by competitive bidding in situations such as: sole source supply; through a competitive bid process; no responsive and/or responsible bids are received at acceptable levels of price, service, or terms; services are to be performed by a utility; or the prices for work or services are established by law or regulation.
- The purchase is for experimental, developmental or research work, or for the manufacture or furnishing of property for experimentation, development, research or test.

B. **Process.** Negotiations will be conducted under the direction of, or by Purchasing Services staff to arrive at the most favorable pricing, availability and terms for the UI. Any requests totaling more than \$510,000 should be confirmed by a written offer from the vendor.

### Version History

July 2026 – Increase to established thresholds for vendor confirmation.

July 2005