



University  
of Idaho

# STANDARD ONE:

*Evaluation of Institutional  
Effectiveness, February 14, 2022*



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February 14, 2022

I am pleased to present the University of Idaho's Seven-Year Self Evaluation Report to the Northwest Commission on Colleges and Universities. We look forward to your virtual visit later this spring, and to gathering feedback from the evaluators.

Our community worked hard to put together a report that captures the depth and breadth of our offerings at the University of Idaho. We've showcased the ways we're delivering access and excellence to students and delivering on our land-grant mission in the state of Idaho.



After facing several monumental challenges over the past several years, the U of I is on the rise. We're financially stable and in a position to reinvest in our top priorities. We're delivering tremendous value and opportunities for students – U.S. News & World Report recognized the U of I as the No. 1 best value of any public university in the West (and No. 2 nationally). Our enrollment outlook is trending upward. And our fundraising campaign is ahead of schedule in supporting student success.

The University experienced several years of financial turmoil and was moved to reducing expenses in 2019 and 2020. Those measures along with a newly implemented hybrid budget model have the U of I in a financially sound place two years later. In 2020 and '21 we achieved positive operational cash flow results. Our budget model is guiding resource allocation and rewarding programs with increases in enrollment, student persistence and collaboration. This is helping us advance student success, improve efficiency, and allows us to respond to the demands of the markets we serve most effectively.

Students are discovering the immense value and unmatched student experience we offer. The U of I is bucking the national trend in college enrollment. Our overall enrollment in the fall of 2021 rose nearly 5 percent, and our first-time freshman enrollment increased by more than 16 percent.

Our capital campaign is raising millions of dollars for Idaho students who would otherwise not be able to afford college. We're committed to improving Idaho's go-on rate and working with our sister institutions in the state to stress the value of higher education to our high school students and their families.

We appreciate the opportunity to gain insights from the NWCCU evaluators and welcome their recommendations on how we can improve.

Sincerely,

C. Scott Green  
President



***Institutional Mission***

## Institutional Mission

### 1.A.1

The institution's mission defines its broad educational purposes and its commitment to student learning and achievement.

The U of I institutional [mission](#) is firmly supported and articulated through our vision, values and principles.

Our mission states, “***The University of Idaho will shape the future through innovative thinking, community engagement and transformative education***” by “*enhancing the scientific, economic, social, legal and cultural assets of our state and develop solutions for complex problems facing our society*”. This is conducted by focused excellence in teaching, research, outreach, and engagement throughout the state at all instructional and research sites, as well as extension agencies. The curriculum is designed to engage student learning and create self-reflection at all levels in multiple modalities and supported by “*excellence and enriched by the knowledge, collaboration, diversity and creativity of our faculty, students and staff*”.

The institutional vision states that, “***The University of Idaho will expand the institution's intellectual and economic impact and make higher education relevant and accessible to qualified students of all backgrounds***”. We prepare students with not just today's knowledge, but also with the ability to discover new knowledge, solve novel problems, lead and construct the future with the aim of creating knowledge, and impact lives through our research, scholarship and creative activity. Through this vision we will maintain our current leadership in research and engagement with Idaho communities, putting new knowledge into action through persistent growth at all levels. We do so, “*representing a cross-section of Idaho in ethnic, socioeconomic and demographic terms*”.

Furthermore, we are a “*purpose-driven organization, a vibrant intellectual community that attracts, retains and develops great faculty and staff. We will achieve this outcome by using our existing resources effectively, generating additional resources and improving our physical and professional environment*”.

Our values are stated here:

- **Excellence** - We value the purposeful pursuit of knowledge that improves our communities and prepares us for a lifetime of service.
- **Respect** - We believe that an institution is only as strong as its ability to include diverse perspectives that critically contribute to the University of Idaho's mission.
- **Integrity** - We believe that adherence to and a shared understanding of ethical principles is necessary for effective collaboration within an educational community.
- **Perseverance** - We believe in a community that is brave and bold in our pursuit of higher aspirations, always pushing to offer the best opportunities and environment for our students, faculty, staff and community.

- **Sustainability** - We embrace our personal and social obligation to ensure the sustainability of our future.

We **strive** to be an open, inclusive, and dynamic public university committed to the exchange of ideas.

The University of Idaho:

- Welcomes and respects all people
- Supports the free and open exchange of ideas and civil discourse
- Believes in the unfettered pursuit of knowledge
- Provides the tools and practice to think critically
- Affirms democracy and our basic commitments to its fundamental principles
- Encourages civility in the resolution of conflict, supports peaceful demonstration and condemns violence as a means of expressing beliefs
- Nurtures an environment for all Vandals to succeed.

The [Idaho Impact Annual Report Update 2020-21](#) shows alignment among our mission, values and principles, and with our goals, objectives, and performance metrics.



## ***Improving Institutional Effectiveness***

## Improving Institutional Effectiveness

### 1.B.1

The institution demonstrates a continuous process to assess institutional effectiveness, including student learning and achievement and support services. The institution uses an ongoing and systematic evaluation and planning process to inform and refine its effectiveness, assign resources, and improve student learning and achievement.

#### **Defining and Leading Institutional Effectiveness**

C. Scott Green took office as the 19th president of the University of Idaho on July 1, 2019. President Green joins U of I as a highly accomplished executive with a career in global finance, operations and administration. He is also a proud alumnus of the university, graduating in 1984. He has provided our institution with unique expertise, new ideas, and a sustainable plan for managing the university's resources to achieve our mission.

The University of Idaho has a 10-year strategic plan implemented in 2016 ([2016-2025 Strategic Plan](#)). President Green took a fresh look at the university's progress on this plan and our mission fulfillment strategy. He challenged our leadership to think differently and create a sustainable financial model to guide future university decisions. The result was a Sustainable Financial Model Working Group which began meeting in Fall 2019 to evaluate and recommend a model that would improve our financial strength and allow for strategic investment based on the needs of our students and State. The group recommended a new financial model, called the [Vandal Hybrid Financial Model](#), developed using four guiding principles (see the [Sustainable Financial Model Working Group White Paper](#) for additional detail):

- Mission alignment
- Transparency
- Agility and adaptability
- Incentive Based

President Green's leadership has disrupted the status quo and challenged the way we operate. The University of Idaho had defined mission fulfillment using aspirational targets, which we were not achieving. President Green took corrective action to improve our position. In doing so, he has identified four strategic initiatives as our foundation for mission fulfillment:

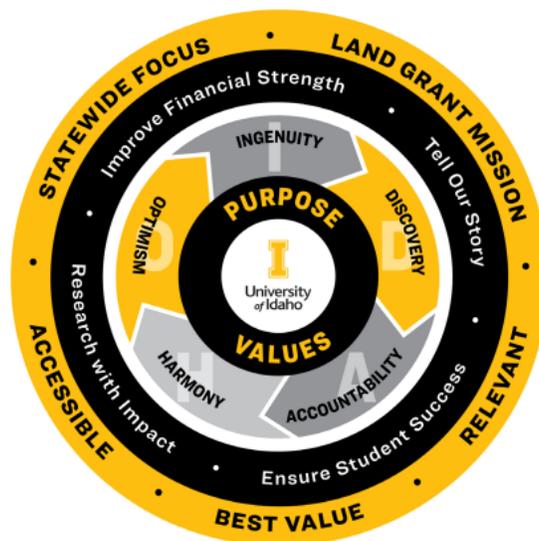
1. Supporting student success
2. Prioritizing research
3. Telling the story of our institution
4. Improving financial strength

We continue to monitor and discuss the metrics in our strategic plan, including the aspirational targets identified by our previous administration, and initially used to measure mission fulfillment. Progress is communicated annually, most recently in our [2021 Annual Update](#). The University of Idaho expects it will take three to four years to see results from the changes in the

financial model and revisioning of our aspirational goals. Early data show these changes are making a positive difference despite the ongoing global Covid-19 pandemic. Making gains in this challenging time leads one to believe the efforts will be fully realized in a non-pandemic world. Furthermore, evaluator feedback from our 2018 Ad Hoc Report addressing mission fulfillment, changes to NWCCU accreditation standards and the shift away from core themes also impacts how we are moving forward.

The University of Idaho is responding to the need to reevaluate our mission fulfillment metrics and restructure evaluation and decision-making processes to support this shift. Rather than making reactive changes, we have taken a timeout on further changes to these metrics while we aggressively focus on our strategic initiatives, mission, students, and collect more consistent data. It is our intention to engage more deeply with and learn from our internal and external environments, so that we can identify targets that are better informed and aligned with our mission, grounded in lessons learned from past processes and demonstrated evidence of where we will have the greatest impact going forward. The Circle of Success shown in Figure 1 demonstrates how our strategic initiatives support our mission and values.

Figure 1: Circle of Success



**Leadership Groups: University Decision-Making**

Our mission fulfillment and strategic initiatives are supported by several groups working to promote inclusiveness, enhance efficiency and facilitate decision-making at the university level. These groups are: Core Operations, Academic Leadership Council, Senior Leadership Council, and University Leadership Forum. They work to fulfill the university's mission and achieve its strategic initiatives and mission fulfillment goals.

**Core Operations** group is composed of the president’s executive leadership team and office staff. The group meets weekly to review the president’s prior and current week activities and to

share operational status in each of the major divisions of the university (Finance and Administration, Advancement, Academics, Research and Information Technology) for coordination across the divisions.

**Academic Leadership Council** provides a venue for academic leaders university-wide, primarily deans, vice provosts, and center directors, to discuss, coordinate and communicate openly and transparently across the academic affairs division. The meetings are intended to promote inclusiveness, enhance efficiency, discuss business processes and inform individuals with decision-making authority. The council develops recommendations and implements actions to fulfill the university's mission and achieve goals as outlined in the strategic plan.

A list of Academic Leadership Council members can be found on the [Provost/EVP website](#).

**Senior Leadership Council** is comprised of the Academic Leadership Council, vice presidents, and other members of the President's leadership team. It meets monthly to share information, discuss initiatives and offer feedback that relate to the overall mission and vision of the institution. Led jointly by the university president and the provost, the council informs the strategic decisions of the executive team and plans for the future based on input from the various divisions that make up the university.

**The University Leadership Forum** are held two to three times per semester and is composed of broad leadership representation across the university. The meetings are typically topic-based for the purpose of information sharing, feedback and unification of messaging. [Please click here to watch the video for the University Leadership Forum with Gardner and Associates.](#)

### **University Working Groups: Guiding Decisions on Strategic Areas of Focus**

A series of working groups is in place to guide decision-making at the university. The working group model is a way to garner internal and external input from subject matter experts to address some of our bigger challenges. The working groups are a tool for informed, transparent decision-making on complicated issues where an inclusive process representative of all stakeholders is needed. Each working group assesses the subject area, its function and areas of improvement. A recommendation to address the challenges, in the form of a white paper, is developed.

The Institutional Planning and Effectiveness Committee (IPEC), established several years ago as a recommendation and decision-making body, has evolved into working groups. Instead of one committee, we have multiple committees shifted for the better. We have learned that more focused working groups provide greater opportunity for expertise on areas of focus. Each of our working groups includes at least two external subject matter experts. For example, our financial model working group included two retired Chief Financial Officers, one from a Fortune 500 company and the other one from one of the largest private companies in the country. It also included a former chair of one of the Big Four accounting firms. All of these external experts are also University of Idaho alumni. These are our active working groups:

- [Comprehensive Campaign](#)
- [Online Education](#)
- [Financial Model](#)

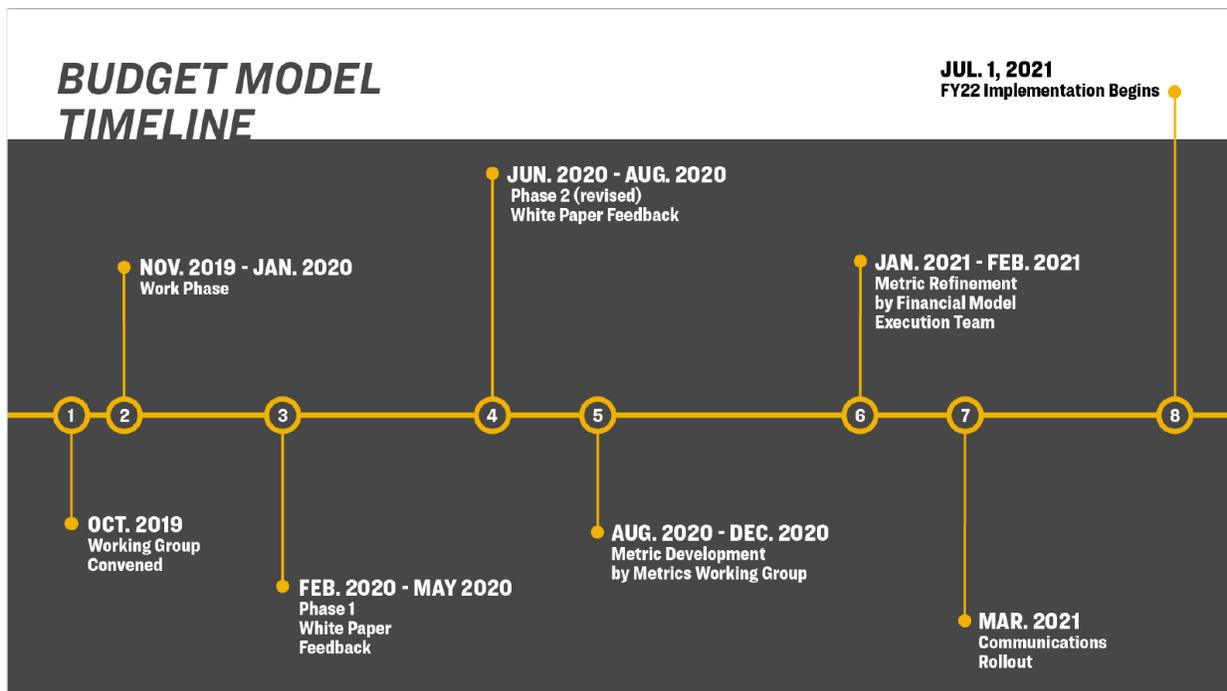
- [R1-2025 Research Initiative](#)
- [Student Experience](#)
- [Sustainability](#)

## **Vandal Hybrid Budget Model: Understanding the University’s Evaluation and Planning Process**

The Vandal Hybrid Budget Model is a new approach to our university’s budgeting process for general education funding from the state general fund, tuition, and state land grant endowments. This performance-based model uses performance metrics to assess for institutional effectiveness, specifically in student learning, student achievement, and student support services. As metrics are achieved by colleges and programs, our strategic initiatives and mission are also achieved. This model ensures that the university is monitoring and refining its effectiveness by allocating resources to invest in strategic areas that fulfill our mission. This model funds growth through performance achievement and does not require the help of the University Budget and Finance Committee (UBFC), a long-standing Faculty Senate-appointed committee, that has been repurposed over the years. This committee has been recently tapped to evaluate and recommend micro investment from P3 and the President’s and Provost’s excellence funds to faculty projects to advance the mission of the institution. The university is evaluating a continuing appropriate role for this committee in the new financial model.

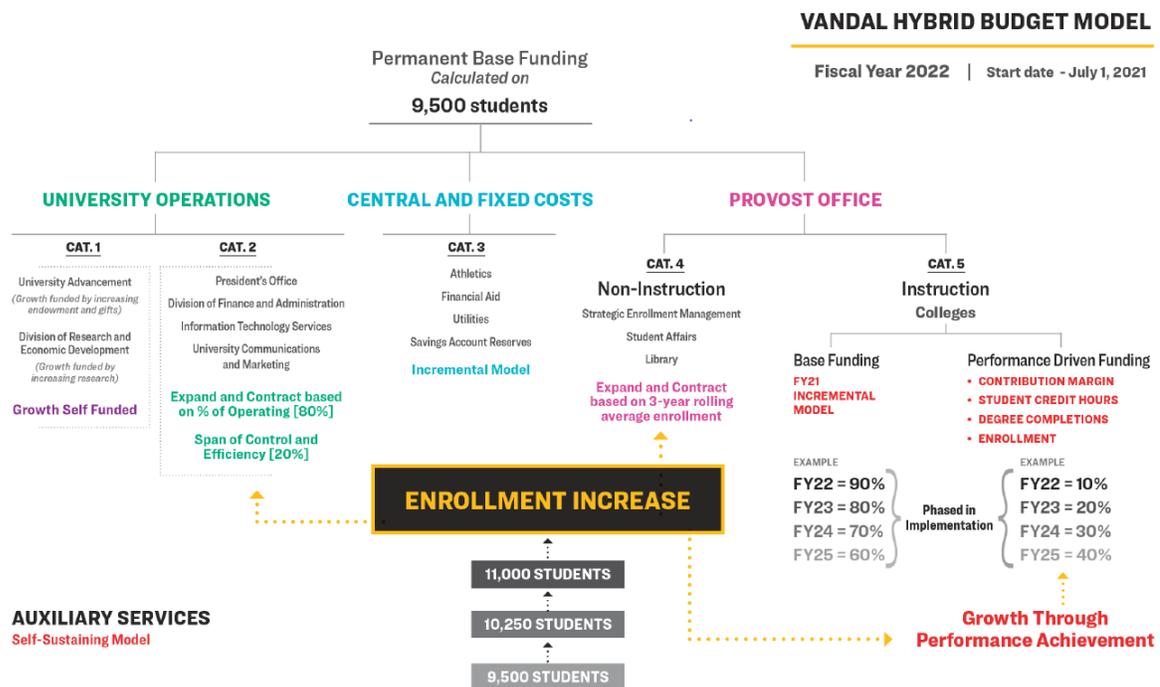
Accountability, incentives for growth, efficiency, entrepreneurial thinking, and improving financial strength are key components of the model, and the performance metrics align with our strategic initiatives. This new budget model better aligns our funding with our priorities and has begun implementation for FY22 (see timeline in Figure 2).

Figure 2: Budget Model Timeline



The Vandal Hybrid Budget Model applies to general education funding only. A key success factor of the model is that incentives are awarded based on prior year’s results rather than forward looking guesses, which should prevent the deep operating deficits experienced in the recent past. Budgets are conservatively calculated based on enrollment achieved in the previous year, and successful target achievements, rather than an aspirational target enrollment number. For FY22, permanent base funding was setting using conservative enrollment estimates to ensure the baseline for the model was set at an achievable level. All university units have been reviewed and categorized into the new model into one of five categories, which are treated slightly different depending on the need of the area. The five categories are shown in Figure 3.

Figure 3: Five Categories of Vandal Hybrid Budget Model



Our inaugural year is also our pilot year. We expect that this model will drive improvements that will advance our university and our mission. Being both an inaugural and pilot year, we are ready to pivot should there be unintended consequences requiring corrective action. However, preliminary results are encouraging. Additionally, the University is transitioning to this model in increments, providing academic college leadership time to adjust their internal budget allocations and efforts to align with strategic initiatives before their full general education funds are considered ‘at risk’ to the new model. This model provides opportunity to get more money for their areas by successfully growing their enrollment.

**Program Prioritization**

Program prioritization remains mandated by the University of Idaho Board of Regents/State Board of Education as a process for setting priorities and allocating resources. As such, priorities inform our General Education budget allocation for the upcoming year. Results from the 2018 program prioritization process are available [here](#). An [update on program prioritization was](#)

[shared in April 2020](#), and includes decisions resulting from the evaluative process. Program prioritization is conducted every five years.

### **Cascaded Plans**

Colleges and divisions continue to use Cascaded Plans as guiding documents during this transition to the Vandal Hybrid Budget Model. Cascaded Plans were developed using the guidelines [here](#), and plans for Strategic Plan Waypoint 1 (2019) are available [here](#). The guidelines for these plans are being updated to align with our strategic initiatives, new program prioritization metrics, and the new Vandal Hybrid Model for the next three-year planning cycle. Cascaded plans are developed, implemented and evaluated at the college and/or division-level, in support of university strategic initiatives and informed by multiple data sources. These sources are both internal and external sources, such as program self-studies ([Annual Program Review](#) and [Program Learning Outcomes Reports](#)), industry stakeholders, survey data, student achievement metrics, and IPEDS data.

### **Evaluation and Planning Process for New Academic Programs**

Program offerings are initiated through an three-year planning process, which is overseen by our governing body, the University of Idaho Board of Regents/State Board of Education and prioritized based on institutional initiatives. The planning process requires development of a draft proposal that includes a description of the program and degree level, and identifies student demand, work force needs, relationship to strategic initiatives and college mission, and resources required for implementation (financial, personnel, facilities, etc.). This process is being refined and integrated into the Vandal Hybrid Budget Model, with input from internal and external stakeholders, in 2021-2022. Changes to this process include evaluating proposals for financial viability and evidence-based need. For example, college Deans must approve the financial obligation of all new programs using available resources and requests should be supported by evidence demonstrated by sources such as Annual Program Review self-study reports. The Vice Provost of Academic Initiatives does a market analysis on requests, and then prioritizes institutional initiatives.

#### **1.B.2**

[The institution sets and articulates meaningful goals, objectives, and indicators of its goals to define mission fulfillment and to improve its effectiveness in the context of and in comparison with regional and national peer institutions.](#)

The University of Idaho has identified four strategic initiatives that will drive performance needed to advance our university and our mission:

1. Supporting student success
2. Prioritizing research
3. Telling the story of our institution
4. Improving financial strength

President Green [inherited multiple years of back-to-back operating losses](#). The University of Idaho had an operating shortfall of \$19 million in FY2019, following a \$21 million shortfall in

FY18. Additionally, mission fulfillment metrics were pegged to poorly informed aspirational targets. It was clear that the institution needed to reevaluate its goals, objectives and indicators for meaningfulness and effectiveness. Budget cuts of \$14 million (off cycle) and \$22 million were implemented for FY 20 and FY21, respectively. Issues with our aspirational targets were raised during our 2017 Ad Hoc peer feedback report and site visit. President Green took corrective action that is detailed in 1.B.1., addressing these items. The results have been operating surpluses in FY20 and FY21, although the pandemic impacted both revenue and expenses in both years.

The Vandal Hybrid Financial Model, implemented for FY22, sets and articulates meaningful performance metrics across the institution that support all four strategic initiatives. Units fall into one of five categories, with slightly different criteria and performance metrics depending on the need of the area. This model covers funding for university operations, central and fixed costs, and the provost office. Each of the five categories is described below, and includes goals, performance metrics, and inaugural data where available.

**Strategic Initiative Goals and Metrics**

*Category One*

Units: University Advancement, Division of Research and Economic Development

University Advancement Goals

During the transition to a self-funded growth model, Advancement receives funding through gift fees, endowment management fees, and short-term cash investments. The President’s Office has funded Advancement with \$200,000 from unrestricted funds from the Foundation.

FY	Range Goal	Actual
2021	\$48 - \$52 million	\$54,163,742 (record year)
2022	\$50 - \$55 million	\$48,042,158 (YTD 2/9/22)

Performance Metrics: Self-funded growth – the budget adjusts based on actual performance.

FY22 Data: See **Appendix A** for University Advancement

Division of Research and Economic Development Goals

ORED goals include the management and deployment of the P3R1 funds towards our R1 goals university wide. This includes increasing the number of Ph.D. students graduated, both university wide and in specific disciplines (e.g. humanities and social sciences). Additionally, a priority has been to increase the number of doctoral level research staff (postdocs, scientists). To this end, \$3 million has been allocated to spend towards these efforts. We have matched 25 postdocs and 37.5 Ph.D. students in the P3R1 matching program (25 postdocs on grants/25 on P3R1 funding) and (70 Ph.D. students on grants and 37.5 Ph.D. students on P3R1 funds). For the doctoral staffing program an additional 24 Ph.D. level scientists will be hired through FY22.

Other goals are continued efforts to support Federal Relations and Federal Advocacy for UI proprogramming enterprise wide, compliance of the UI research enterprise, sponsored programs

management, technology transfer, contract service, and improvement of competitiveness for UI grant applications.

Performance Metrics: Self-funded growth – the budget adjusts based on actual performance.

Figure 4: Strategic Plan Goal 1, Selected Performance Metrics

PERFORMANCE MEASURES		Baseline 2014-15	2016-17	2017-18	2018-19	2019-20	Waypt 2 2022	Final Goal 2025
1.1 Terminal Degrees in Given Field (PhD, MFA, etc.)	Goal		285	300	325	325	380	425
	Actual	275	236	231	251	242		
1.2 Number of Postdocs, and Non-Faculty Research Staff with Doctorates	Goal		70	75	80	80	100	120
	Actual	66	102	92	83	103		
1.3 Research Expenditures (\$ Million)	Goal		100	105	115	115	135	160
	Actual	95	102	109	111.6	113.1		
1.4 Invention Disclosures	Goal		20	25	30	30	40	50
	Actual	14	21	24	26	35		

FY22 Data: Not yet available. See **Figure 4** for FY22 targets.

*Category Two (Core Support Operations)*

Units: President’s Office, Division of Finance and Administration, Information Technology Services, and University Communications and Marketing

Goals: Minimizing Cost, Maximizing Efficiencies

Performance Metrics: Span of Control, Customer Service, Efficiency of Operation

FY22 Data: See **Appendix B** for mid-year data on unit-specific metrics

Central and Fixed Costs

*Category Three*

Units: Athletics, Financial Aid, Utilities, Savings Account Reserves

Goals: Incremental – the budget largely adjusted for inflation and need incrementally.

Performance Metrics: Balanced budget.

FY22 Data: Not yet available.

Provost Office and Academic Affairs

Non-instructional units within Academic Affairs, have funding expansion and contraction based on a 3-year rolling average enrollment. The idea being that these services need to

expand/contract with growing/declining enrollment, regardless of which college produces the enrollment, because they serve and support the entire student body. This year, as an example of how funding is distributed to category 4 units, Academic Affairs was given an allocation for category 4 and an allocation for category 5.

Each unit leader was asked to present requests for additional General Education funding. All the units met together, each unit leader presented their requests, and was asked to provide feedback on the requests from the other units. The feedback was collated, and the Provost made final allocation decisions for all category 4 and 5 units.

#### *Category Four (Non-Instruction)*

Units: Strategic Enrollment Management, Student Affairs, Library

Goals: Expand and Contract Units Based on Enrollment

Performance Metrics: 3-Year Rolling Average Enrollment

FY22 Data: See **Appendix C** (FY22 Academic Metrics Category 5) for 3-year rolling averages.

#### *Category Five (Academic Colleges - Instruction)*

Units: All Colleges

Goals: Address Structural Issues, Reward Collaboration, Recognize Mission Centrality, Resolve Emerging Issues

Performance Metrics: Contribution Margin (Net Tuition + F&A + G&A), SCH Delivered, UG Degree Completions (3-Year Average), GR Degree Completions (3-Year Average), UG Enrollment Trend, GR Enrollment Trend

FY22 Data: See **Appendix C** for backward looking data on performance metrics used to calculate FY22 budget.

Improving the financial strength of our institution is intertwined in a complimentary relationship with the other three strategic initiatives. We believe that by focusing our financial model on the other three initiatives, we will improve our financial position. And that an improved financial disposition returns an increase in our future investment in these same focus areas. Similar to the flywheel concept, once our initiatives are fully implemented, we believe it will gain momentum and allow us to achieve our mission and growth potential.

#### **Strategic Plan Metrics**

As mentioned in 1.B.1., the mission fulfillment metrics reported in previous years by the University of Idaho in the [2016 Year One Self-Evaluation Report](#), 2017 Ad Hoc Report, and [2018 Mid-Cycle Evaluation Report](#) are regularly monitored and updated as part of our Strategic Plan. The most recent figures are available in the [2021 Annual Report](#).

### 1.B.3

The institution provides evidence that its planning process is inclusive and offers opportunities for comment by appropriate constituencies, allocates necessary resources, and leads to improvement of institutional effectiveness.

#### **Inclusive Planning Process**

The University of Idaho has a history of using leadership groups that guide institutional-level decision-making. In addition to intentionally inclusive leadership groups, we have newly diversified our Institutional Planning and Effectiveness Committee (IPEC) so that instead of one committee, we now have multiple focused committees. This provides greater opportunity for inclusiveness in planning around a number of strategic initiatives and related projects. We have learned that more focused work groups provide greater opportunity for participation by those with expertise in areas of focus. Each of our working groups are highly representative and inclusive, and now include at least two external experts from the area of focus.

Information on the current leadership groups and its membership is available below, and the role of these groups is discussed further in 1.B.1. Additionally, white papers from each working group provides insight into how these groups engaged appropriate constituencies in their work and recommendations.

<a href="#"><u>Comprehensive Campaign</u></a>	<a href="#"><u>Comprehensive Campaign White Paper</u></a>
<a href="#"><u>Online Education</u></a>	<a href="#"><u>Online Education White Paper</u></a>
<a href="#"><u>Financial Model</u></a>	<a href="#"><u>Financial Model White Paper</u></a>
<a href="#"><u>R1-2025 Research Initiatives</u></a>	<a href="#"><u>R1-2025 Research Initiatives White Paper</u></a>
<a href="#"><u>Student Experience</u></a>	<a href="#"><u>Campus Participation Form</u></a>
<a href="#"><u>Sustainability</u></a>	<a href="#"><u>Sustainability White Paper (Expected May 2022)</u></a>

#### **Including the Student Voice**

The goal of the Student Experience working group is to create opportunities for students to provide direct feedback and present ideas to support and improve the student experience at the University of Idaho. These conversations are ongoing.

To meet the goals of the working group, the Student Advisory Groups (SAG) are formed with the goal of providing a diversity of opinions and feedback. The groups are coordinated by Blaine Eckles, Vice Provost for Student Affairs & Dean of Students. The SAGs will meet periodically throughout the year to have ongoing conversations with President Scott Green and other university administrators. Each new conversation and focus area will be comprised of a new group of students. These conversations offer the opportunity for university administrators to learn first-hand from students and develop ways in which the student experience may be improved upon. Students use the Campus Participation Form to self-select into a future conversation. Previous conversations topics are available for viewing [here](#).

#### **Allocates Necessary Resources**

The ingenuity of the Vandal Hybrid Financial Model is that it provides the mechanism for allocating resources based on our strategic initiatives, which we believe is critical to mission

fulfillment. We have aligned our efforts with our financial position. This was possible because this model was developed on the four guiding principles of: mission alignment, transparency, agility and adaptability, and incentive based. We believe our model achieves all four principles.

For FY22, \$2.7 million of new net tuition revenue was allocated to divisions and colleges across campus. For example, of the \$2.7 million, \$569,000 was allocated to Category 2 divisions (ITS, DFA, President’s Office).

Category 2 leaders agreed that the priority for this year’s funding should be existing commitments. Any remaining funds would then be allocated to DFA and the President’s Office in light of the mid-year allocation of \$351,993 given to ITS for position retention.

Suggested Allocations for Category 2:

President’s Office	Internal Audit Position	\$ 54,757
	OCRI Consulting Position	\$ 85,000
ITS	Position Retention	\$ 351,993
DFA	Sustainability Director	\$ 70,000
Other	Other Unfunded Needs	\$ 7,250
	<b>Total</b>	<b>\$ 569,000</b>

Categories 4 and 5 received a total of \$1,431,000 as incentive funding to recognize enrollment growth. \$367,943 was given to Category 4 units and \$973,057 was given to Category 5 units.

See **Appendix D** for projected increase or decrease based on metric performance in FY22 and how discretionary funding will be reallocated in FY23.

Resource Reallocation Recommendations from Program Prioritization

The results from our program prioritization process in 2020, included closing inactive programs still on inventory, removing emphasis areas, voluntary closures, merging/restructuring departments, adjusting programs, and closing programs based on recommendations. For example, The Materials Science and Engineering (B.S.M.S.E.) program was recommended for closure, with six tenured/tenure-track faculty issued nonrenewal. Also, the music program received the recommendation to adjust the program for increased efficiency and Geology and Geography were combined with similar goals. Please see the [full report from April 2020](#) on the process, committee membership, and results.

**Improvement of Institutional Effectiveness**

The effectiveness of the University’s planning process and allocation of resources can be demonstrated by recent accomplishments around each of our four strategic initiatives.

## *Strategic Initiative: Improving Financial Strength*

### **Improved Moody's Credit Rating**

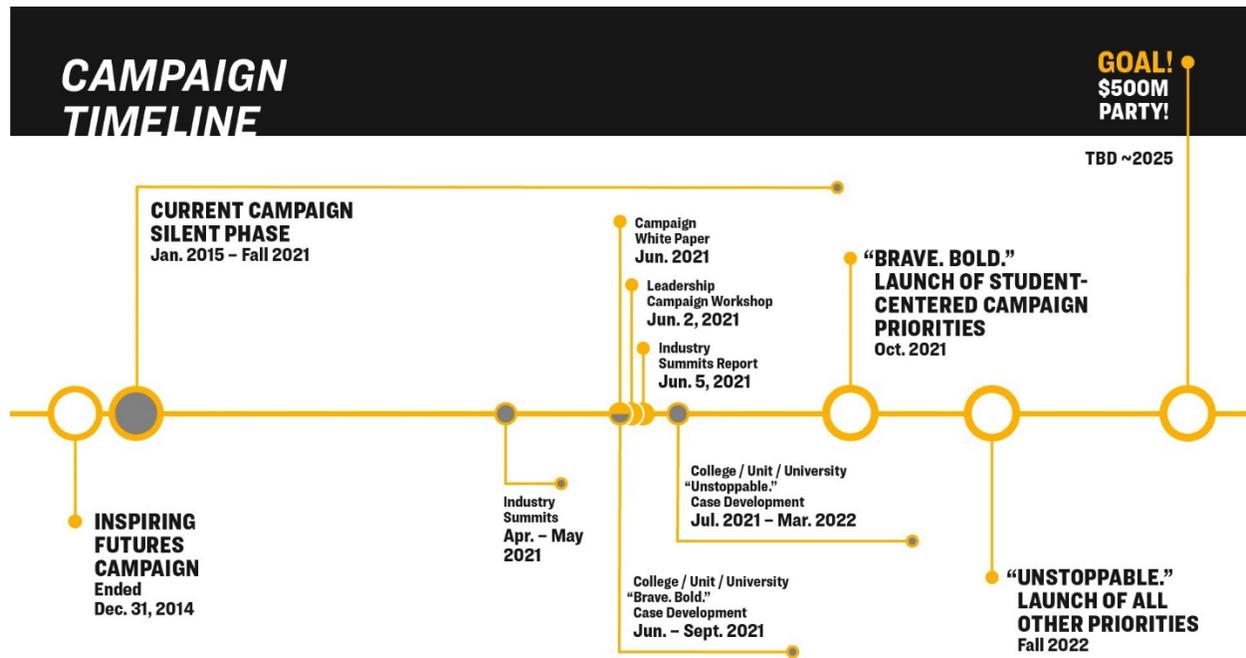
In February 2020, [Moody's Investor Service downgraded the rating on the university's outstanding general revenue bonds to A1 from Aa3](#), issuing an outlook of negative. The rationale cited significant operating deficits in recent years with further use of liquidity projected for 2020, while growth prospects were limited due to our affordability focus and declining State funding. Moody's indicated that improvements to operating performance was dependent on substantial budget cuts.

In January 2022, [Moody's Investor Service revised its outlook for the university from negative, to stable](#). The rationale cited the university's strengthened liquidity and financial reserves, coupled with strong investment returns. Moody's wrote that the improved rating, "incorporates the university's improved wealth level and financial performance," and that the "university benefitted from significant expense reduction efforts." Moody's concluded that FY22 is projected to be another positive year for the university.

### **Comprehensive Fundraising Campaign**

President Green formed the Comprehensive Campaign Working Group to develop and recommend a strategic approach for embarking on a successful comprehensive fundraising campaign. As Idaho is one of the two-fastest growing state in the nation, this growth brings opportunity associated with a well-educated workforce. The Campaign Working Group was tasked to make the case for a comprehensive campaign, describe the communication processes that articulate such a long-term vision, and identify the operational support required to execute a successful campaign. The Comprehensive Campaign [white paper](#) addresses these items and resulted in a recommendation for a phased approach to a public launch of such a campaign. The timeline is shown in **Figure 5**. While a comprehensive fundraising campaign can be seen as simply raising money, for the University of Idaho it is a tool for identifying and accomplishing bold, strategic goals that, as a result, meet the needs of our constituencies and support our strategic initiatives. The first public phase of the white paper and roadmap were implemented for FY22 with the public launch of the campaign, which had already seen much success during the quiet phase in recent years.

Figure 5: Campaign Timeline



For FY20, donors provided \$8 million in endowment contributions to the U of I Foundation, with more than \$2.1 million funding 39 new endowments. Additionally, the University raised \$49.77 million from organizations and the Vandal community, of which \$22.17 million was designated to students, \$16.5 million designated to academic and other programs, \$6.4 million designated to faculty/research support, and \$4.7 million designated to facilities. The University more than doubled the amount raised designated to support students in FY20, compared with FY19.

For FY19, donors provided \$9 million in endowment contributions to the U of I Foundation, with more than \$4.2 million funding 23 new endowments. Additionally, the University raised \$51.8 million from organizations and the Vandal community, of which \$10.5 million was designated to students, \$23.3 million designated to academic and other programs, \$10.1 million designated to faculty/staff support, and \$7.7 million designated to facilities.

### New Public-Private Partnership

The University of Idaho entered into a [50-year lease of its steam plant and utility system to a concessionaire as part of a public-private partnership \(P3\)](#) which provides the university with money to invest in our student success and research initiatives. The 50-year agreement with Sacyr Infrastructure and Plenary closed at the end of 2020 and will provide the university with returns of approximately \$6 million annually over 50 years. Current funding has been invested in student scholarships, research measures, recruitment efforts, and student success initiatives.

## **\$10 Million USDA Funding for Dairy Research**

The Idaho [Center for Agriculture, Food, and Environment](#) (CAFE) will break ground in 2022. The project that spans three Idaho counties includes a 1,500-cow Research Dairy with the adjacent Sustainable Water and Soil Health Demonstration Farm, a discovery center, and a collaborative food science effort with other Idaho institutions. The first major initiative is dairy research funded by a [\\$10 million USDA grant received by the College of Agricultural and Life Sciences](#) in 2020. Idaho CAFE will be a commercial farm and be the host site for a variety of on-going research and demonstration experiments. It will also support UI extension's outreach and education mission being the location of classes and student research. Research has already begun on the demonstration farm and milk production will begin in 2023. More information about the center and its timeline is available [here](#).

*Strategic Initiative: Supporting Student Success*

## **Vandal Promise Scholarship**

Access to higher education for Idaho students is the University's number one priority. Evidence comes from the \$30 million investment in scholarships and waivers offered to students. The [Vandal Promise Scholarship](#) was created to help bridge the \$5,000 gap faced by many Idaho students between financial aid awards and the cost to attend college. The first cohort of approximately 24 students had a 100% retention from Fall 2019 to Spring 2020 and an overall GPA of 3.56. Scholarship recipients meet monthly as a cohort and interact with a staff mentor as part of the program.

## **Vandal Gateway Program**

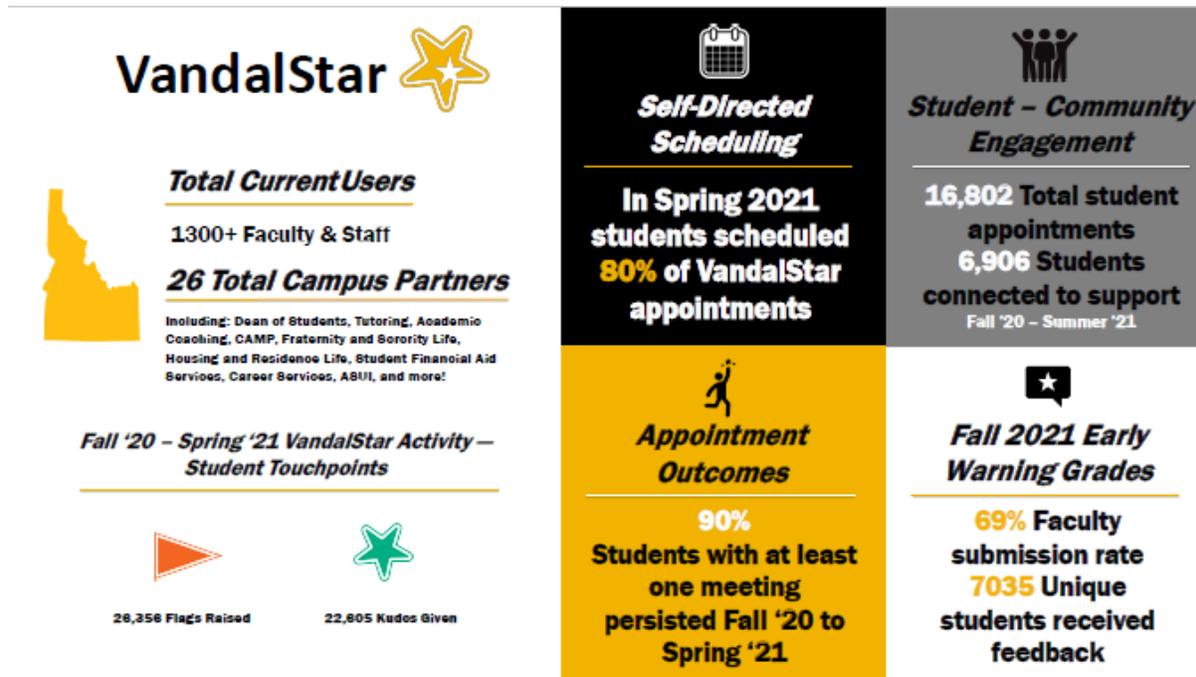
The Vandal Gateway Program is a unique, individualized program whose mission is to provide comprehensive and holistic student support services to empower students to live meaningful and successful lives, both during their college experience and after graduation. A comprehensive list of services can be seen [here](#).

The program provides a pathway to college students who may not have otherwise considered college or whose high-school grades do not meet the University's standard admissions criteria. This program allows a small cohort of students the opportunity to attend on a probationary basis, while receiving cohort-based academic support during the first two semesters of the student's college career. New first-year students entering in Fall 2022 whose cumulative unweighted GPA was 0.30 or less below admission standards, were offered direct admission into the Vandal Gateway Program. Students who do not wish to participate in the program may continue to appeal for regular admission through the Admissions Committee. This program was implemented as a three-year pilot for Fall 2022 through Spring 2025 and will be evaluated annually.

## VandalStar

VandalStar is an initiative focused on student success and increasing graduation completion rates. VandalStar, powered by Starfish, is a web-based retention and advising tool that provides an efficient way to offer coordinated support to all students, ensuring they receive the right type of assistance/intervention to keep them on track. We implemented VandalStar university-wide in Fall 2018.

Since then, we have had over 1300 faculty and staff use the tool to give over 28,000 student flags and 22,000 student kudos.



VandalStar is an information hub that allows us to collect information in one place and enables faculty and advisors to send alerts if there are concerns about academic performance. It also sends “kudos” to acknowledge good performance and student referrals to additional support services. VandalStar also allows for online appointment scheduling with faculty, advisors and support service offices. It helps engage our students in their own progress by keeping them informed, and recommending action even before the student reports feeling overwhelmed.

## Strategic Enrollment Plan

Strategic Enrollment Management (SEM) is in the process of developing our next Strategic Enrollment Plan (SEP). This work is being guided by our enrollment goals, using Key Performance Indicators (KPIs) and a SWOT analysis, developed in partnership with Ruffalo Noel Levitz (RNL). As a result, several situational analyses were developed that led to thirteen action plans addressing student recruitment, retention, and/or persistence at the University of Idaho.

Teams made up of staff and interdisciplinary faculty developed action plans for consideration. These plans are being evaluated and prioritized by university leadership based on return on investment, including the return on enrollment and revenue, as well as alignment with strategic initiatives. Each proposal required a title, strategy description, benefits to the university, mission and strategic plan alignment, enrollment impact, financial impact, and recommended next steps.

Proposed action plans included:

1. **Scholarship Coordination:** Strategic use of all scholarship funds to positively influence student enrollment.
2. **Need-based Recruitment:** Support enrollment of low-income students by increasing marketing and outreach effort encouraging FAFSA completion.
3. **Onboarding Melt Reduction:** Increase enrollment and retention through communication and engagement of transitional support to students that fosters confidence in college choice.
4. **Student Success Analytics:** Improve student retention, persistence, and graduation rates by developing a culture of assessment through actionable analytics.
5. **Vandal Persistence Programming:** Improve student retention, persistence, and graduation rates through a holistic and team-approach to persistence programming.
6. **Vandal Transfers:** Increase enrollment and community college partnerships by creating a new Admissions position focused on the transfer student experience.
7. **Program Demand and Capacity Alignment:** Support enrollment growth with improved alignment between resource allocation and strategic opportunity.
8. **Branding Through Academic Strengths:** Improve academic visibility and enrollment by branding our academic strengths including student learning outcomes and experiential learning aligned with the workplace.
9. **International Collaboration and Connection:** Increase international enrollment by engaging in existing and new partnerships and expanding the global University of Idaho brand.
10. **International Students Experience:** Increase student retention and graduation by creating a seamless process for international students, from program entry through completion.
11. **Program Delivery and Engaged Outreach:** Increase student enrollment, retention, and completion rates of place-bound students by expanding access to dual credit and online courses.
12. **Integrated Recruitment:** Increase student enrollment by optimizing recruitment efforts with better coordination with partners and influencers.
13. **Communications Audit:** Increase student enrollment and retention by strengthening University of Idaho communication and branding with user-centric marketing.

For more detail on each proposal and team members, please see **Appendix E**.

## Diversity Plans

Established in 2004, the university's Diversity Plan was reinstated by the Office of Equity and Diversity in 2018, at the direction of then President Chuck Staben. It was reviewed and revised in 2018-19 by the [President's Council on Diversity and Inclusion \(PDCI\)](#), comprised of [university faculty, staff, and students](#), and presented to the Provost's Council and President's Cabinet for feedback and approved. The Office of Equity and Diversity together with the PDCI developed an implementation plan to strategically move forward with our [eight revised goals from FY19](#).

The college deans selected objectives from the plan they thought to be priority for the institution. They also selected a goal and objective that each college would work toward achieving. Out of this work, each college identified 1 or more diversity goals and objectives. They also developed diversity teams for each college. The PDCI is working with the college diversity teams to clarify metrics for evaluation. We anticipate by the end of the academic year, baseline data for the college diversity objectives will be collected.

The revised goals address:

1. Administrative Structure, Systems, and Processes
2. Institutional Climate, Equal Opportunity, Inclusion, and Human Rights
3. Equity Concerns
4. Student Recruitment and Retention
5. Faculty, Staff, and Administrator Recruitment and Retention
6. Curriculum Diversification
7. Community Issues, Extension, and Outreach
8. Research and Other Scholarly Activity

Six subcommittees are tasked with examining current issues and strategies related to these goals and making recommendations for how the University can meet the Diversity Plan goals. More information about the six subcommittees, including the charge and membership for each, is available [here](#).

## Enrollment

Enrollment growth at the University of Idaho continues to be a top strategic initiative. Overall enrollment declines for the last two years at U.S. colleges and universities are a concern. While other states and regions are expecting significant declines in the number of students graduating from high schools, the number of high school graduates in Idaho will continue to increase from 21,600 in 2021 to 23,900 students in 2026. Additionally, western states will see a modest increase from 820,000 to 857,000 students in the same timeframe according to WICHE. The enrollment at universities in Idaho has potential to remain stable or increase with strong strategic enrollment initiatives. However, we also recognize that competition from out of state colleges will also increase and dropping college matriculation rates in the state are of significant concern.

Our undergraduate admissions for Fall 2021 were up by 7% which led to a dramatic increase in first time freshmen and transfers. First time freshmen were up by 236 students or 16.5% over the

prior comparable period (PCP). Transfer student enrollment was up by 56 students or 11.7%. This incoming class was the largest class since 2016. Our continuing undergraduate student enrollment was down 5.4% resulting in overall undergraduate enrollment that was up 0.4%. New graduate student enrollment was up by 79 students or 13.8% and overall graduate enrollment was up 148 students or 8.2%. The overall fall 2021 enrollment was up by 4.7%.

Enrollment is impacted by the retention of our currently enrolled students. U of I historically has the highest retention rates from first year to second year, and the highest graduation rate among all public institutions in the state of Idaho. Our current registration deficits for the fall were exclusively attributed to retention of our undergraduate students.

### **Recruitment and Retention During a Pandemic**

The COVID pandemic has been a significant challenge for our recruitment and retention initiatives. We have responded with several strategies to offset the impact of the pandemic. The recruitment strategies have produced a strong entering class for FY21 and FY22. Retention of our current students has been challenging.

Our Division of Student Affairs has worked hard to keep our institution open to students while ensuring the health and success of our students. We have provided students free and accessible COVID testing to help identify positive students and assist them with their health needs. An isolation unit was available to students who live on-campus and tested positive, providing them with needed support (food, lodging, etc.) and absence from class while they recovered. Support was also provided to students in quarantine situations.

In an effort to reduce transmission, masks have been required in all common university spaces, including classrooms. Vaccine clinics have been held on campus regularly, since the vaccines became available, and continue to be offered. We have encouraged students to get the vaccines by offering financial incentives, including gift cards to all vaccinated students. In addition to precautions taken on-campus, online course offerings have increased to meet the student demand and needs of the pandemic, over the past two years.

Because the COVID pandemic has eliminated most standardized testing across the nation, we suspended the standardized test requirement for admission consideration for the 2022 recruitment year. We anticipate this will continue to aid students in applying for admission to the university.

Our recruitment events for the fall 2022 class have been a mix of face to face and virtual events. Overall, participation in our recruitment events has been lower than last year with many still concerned about attending large face to face events. Our campus tours continue to be offered face-to-face giving us a strong marketing advantage.

We have continued to work with Ruffalo Noel Levitz (RNL) to assist with final steps of our next Strategic Enrollment Plan. We also continue to work with RNL to develop and implement a stronger financial aid package to better meet student needs and be more competitive with other institutions. Several strategies have already been implemented that we believe will assist us in building our next class.

As a result of a financial aid analysis we adjusted our financial aid / scholarship program. We increased our academic merit scholarships and our need-based scholarship programs including using housing waivers to attract prospective students. The University of Idaho financial aid programs are designed to be attractive recruitment tools as well as support the student for the duration of their degree. We invested in our scholarship software tool to help us leverage our scholarship dollars. Scholarship Universe allows us to utilize scholarships fully and also allow students to more conveniently find third party scholarships to fund their education.

The percentage of transfer students who continue their education after completing a two-year degree at a community college is relatively small across the U.S. We have taken deliberate steps to build [a seamless transition for transfer](#) students through a joint admissions/enrollment initiative with Idaho community colleges. We continue to build these programs to enhance our transfer student enrollments.

A [Co-op Program](#) was funded on an external grant and provides students the opportunity to earn a salary while on an experiential learning practicum. The coop programs are attractive to prospective students and will make our programs even more attractive. We are in the final year of a three-year grant for our co-op program and reapplied for five-year renewal.

### **Online Education**

In Spring 2020, President Green commissioned the Online Education Working Group. Detailed information is available in this [white paper](#), which is used to inform our roadmap. The working group examined the opportunities available through online education and developed a plan for a robust and stable online education offering. The recommendation from this group was a university-wide approach to online education with a single office under Academic Affairs overseeing and coordinating the online efforts and programming. As a result the role of [Vice Provost for Digital Learning Initiatives was created](#) and filled in July 2021.

Additional recommendations included making sufficient resources available to the Center for Excellence in Teaching and Learning to assist with course development and quality assurance, improving infrastructure to strengthen support services to online students, and developing a marketing and communication strategy to create visibility of our online programs in the online education marketplace. Greater detail about these recommendations, timeline, and budgetary requirements is available in the [white paper](#).

Projected enrollment numbers based on institutional data and national reports suggest student demand for online educational offerings. We estimate that if we continue the current trajectory, the university will serve over 4,000 online students by 2026. With a centralized and focused online effort, growth could well exceed predictions. Furthermore, comparing estimated tuition income, currently online student growth rates, and the costs of the overall University of Idaho online campus program, the return on investment is expected to exceed 200% by 2023, and over 450% by 2026 (see [white paper, Appendix J, Figure 5](#)).

## Student Experience

The Student Experience working group creates opportunities for students to provide direct feedback and present ideas to support and improve the student experience at the University of Idaho. The university held several conversations touch on various topics (shown [here](#)). The meetings were intentionally designed to give students opportunities to share their life experiences with senior administrators (the President, Provost, Dean of Students, etc.) on a variety of different topics to help inform future decisions. The topics are geared toward identifying areas of importance for students and/or that may help inform institutional practices moving forward. Future such discussions may include recruitment to the University of Idaho, sustainability, and social just discussions.

*Strategic Initiative: Prioritizing Research*

## Research Expenditures

As mentioned in the 2016-2025 strategic plan, the University has had a goal of improving our Carnegie Ranking to the highest research ranking (R1) status. Details on a sensitivity analysis that reconstructed the Carnegie rankings of universities that met the minimum threshold and determined the most sensitive inputs to achieving R1 status was shared in our 2017 NWCCU Ad Hoc Report. That study confirmed that we needed to increase our research expenditures.

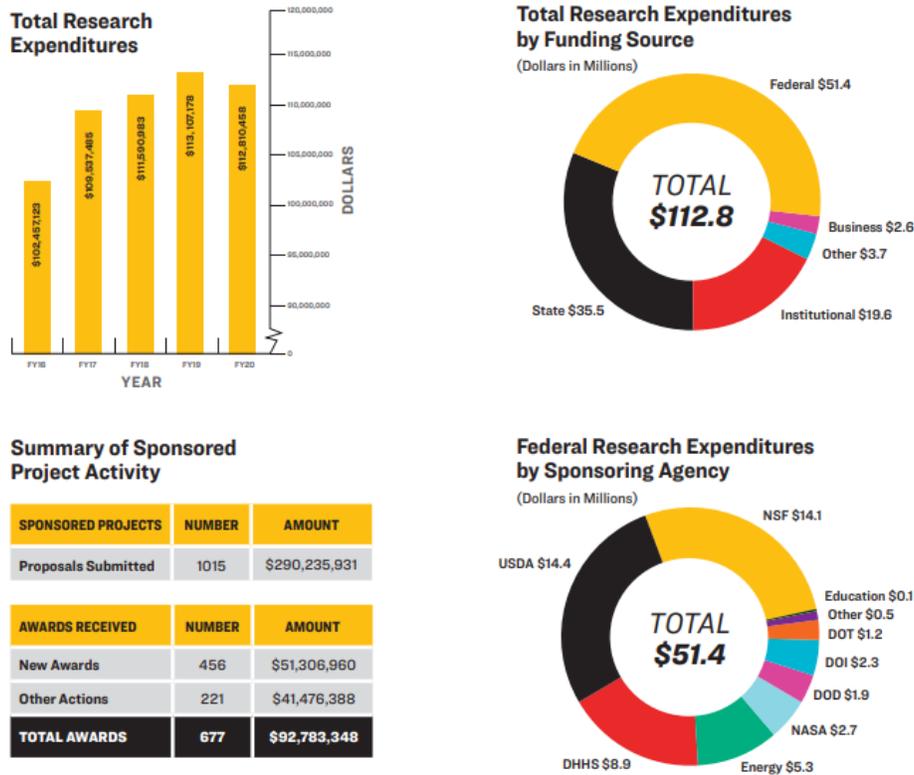
U of I has monitors and reports its research expenditures annually, as part of its strategic plan metrics. These numbers are compared with aspirational targets which we are achieving or close to achieving (see **Figure 6**). Our next waypoint is FY22 with an aspirational target of \$135 million. For FY21, the University had research expenditures of \$112.8 million.

Figure 6: Research Expenditures

PERFORMANCE MEASURES		Baseline 2014-15	2016-17	2017-18	2018-19	2019-20	Waypt 2 2022	Final Goal 2025
1.3 Research Expenditures (\$ Million)	Goal		100	105	115	115	135	160
	Actual	95	102	109	111.6	113.1		

We are on a generally upward trajectory and recently increased our investment toward this initiative. Most of our research funding comes from federal and state sources, as shown in **Figure 7**. The University is investing in post-doctoral researchers, research staff, and graduate students to help faculty accomplish research objectives. The benefit to the university will be an even larger share of federal research dollars, higher quality research programs, and a greater ability to attract quality faculty and students.

Figure 7: U of I Annual Report 2021, Research Expenditures



### R1-2025 Research Initiative

In 2020, the R1-2025 Research Initiative Working Group finalized its recommendations to invest in moving the university toward R1 Carnegie Classification of Institutions of Higher Education. This group took a fresh look at the landscape of research and graduate education at the U of I, with the objective of identifying actions to improve the research culture and incentivize greater research and doctoral degree productivity (a strategic plan metric). These measures would improve the quality of the university’s research and produce improvements in research output and graduate degree completion. This is consistent with the University’s goal of achieving R1 classification in the Carnegie Classification. The Working Group explored the reasons for shortcomings in these areas. The plan recommended by the Working Group emphasized investment in these areas: post-doctoral scholars, graduate students, and reallocation of F&A funds collected from sponsored projects. Detailed information on context, recommended actions, and priorities can be found in the Working Group’s [white paper](#).

The University is currently implementing the recommendations of the Working Group. In January 2021, the university announced it will invest \$3 million annually to execute the recommendations. Of that new investment, \$2 million is allocated toward postdoctoral fellowships, and \$1 million toward new doctoral research assistantships. Funding comes from the

public-private partnership on the University's energy infrastructure and is thus named the P3-R1 Initiative. See the [P3-R1 Grant Matching Program webpage](#) for more detail.

## **COVID-19 Response**

While the COVID-19 pandemic certainly presented many challenges to institutions of higher education, our University found opportunity to engage in research that benefited our Vandal community and beyond. We returned to in-person instruction much sooner than some of our peers in part because we started a COVID-19 testing lab that served the Moscow campus and greater community. This made testing available and convenient for our community, allowing for regular screenings and access to diagnostic testing.

[University researchers partnered with the City of Moscow](#) to improve wastewater testing for SARS-CoV-2, the virus that causes COVID-19, enabling an early warning system that detected increases of cases in the community.

Intervention strategies modeled by our researchers informed the Idaho Department of Health and Welfare and Governor Brad Little's Coronavirus Taskforce.

Additionally, University researchers are making contributions to how we understand or cure coronaviruses. A biological science team is working to identify a cure for coronaviruses and develop a pipeline for identifying drugs that block viruses from entering human cells. In another study, evidence that breastfeeding women with COVID-19 don't pass the virus in milk but do transfer milk-borne antibodies that are able to neutralize the virus. More information about how we responded to the pandemic is available [here](#).

*Strategic Initiative: Telling the Story of our Institution*

## **Statewide Listening Tours and Activities**

President Green spent his first summer as president traveling the state to listen and learn from Vandals and others who are invested in the university's mission. The focus of these sessions was to deepen existing partnerships and create new ones that will ensure the University provides what industries need to thrive. He has visited nearly every Extension and research center located in 42 of Idaho's 44 counties. He also held industry summits with Idaho CEOs and other business leaders, hearing from over 50 industry leaders between March and May 2021. This work helped inform our strategic initiatives and projects.

## **Enroll Idaho**

Enroll Idaho provides career and college counseling, financial aid, and other resources to high school students and encourages them to go on to any of Idaho's colleges or universities. The program contributed to greater awareness about the University of Idaho and other institutions across the state. It included visits to high schools to share how higher education benefits students who choose to continue their education.

## Ambassador and Vandalizing the Classroom Toolkits

In Fall 2019, the University launched a brand ambassador program with a toolkit and bragging points to tell the Vandal Story. Telling the Vandal Story with one voice will attract students, inspire our alumni, and nurture public support. Additionally, thousands of classrooms, gymnasiums, and administrator offices across Idaho and the nation have been “vandalized” in the best way possible. This program provides alumni teachers and educators Vandal branded pennants, pom poms, posters, decorations, and school supplies to share their Vandal pride in their classrooms.



## Marketing Campaigns

The University is promoted through multiple platforms. We use Facebook, Instagram, and Search Ads to focus on recruiting new students. Though we target in-state students, we also work hard to tell the Vandal story to perspective students in the WUE states.

Additionally, we strive to drive awareness through the use of billboards on the highway, signage in airports, and coffee sleeves in airport restaurants. To engage and increase awareness of Alumni, parents and the public, we will be launching a new campaign in the spring of 2022 which will include static billboards, digital billboards, transit boards (bus wraps), as well as Over the Top (OTT) streaming TV and traditional TV commercials.



Thanks to space donated by some generous donors, we also have 3 branded grain bins proudly displaying the UI Brand.

#### 1.B.4

The institution monitors its internal and external environments to identify current and emerging patterns, trends, and expectations. Through its governance system it considers such findings to assess its strategic position, define its future direction, and review and revise, as necessary, its mission, planning, intended outcomes of its programs and services, and indicators of achievement of its goals.

#### **Strategic Plan**

We have a 10-year strategic plan implemented in 2016 ([2016-2025 Strategic Plan](#)) that continues to serve as a guiding document. Goals, objectives and metrics from this plan are regularly monitored and findings are communicated to the Vandal community, the State Board of Education, and the public. The President's Office publishes an annual update on the strategic plan and initiatives, available [here](#). Additionally, the [Provost, who is a Faculty Senate ex-officio member](#), provides updates directly to Faculty Senate which meets weekly during the academic year. Senate meeting [talking points](#) and [minutes](#) are documented and made available to the Vandal community and the public.

Based on recommendations from inclusive and expert [working groups](#), and through its governance system, the University continues to revise as necessary, its mission, planning, intended outcomes of its programs and services, and indicators of achievement of its goals. Revisions are documented in 1.B.1. and include four explicit areas of strategic initiative and new performance metrics associated with the [Vandal Hybrid Financial Model](#).

#### **Cascaded Plans**

The strategic plan goals are supported by colleges and units across the university, through their own [Cascaded Plans](#). These cascaded plans provide alignment between institutional goals and initiatives, and those of our many units. The plans also address how resources will be used in support of meeting the strategic plan goals. New plans are created every three years, with the [most recent plans created in 2019](#).

The cascaded plans remain a guiding document for units. However, with the new Vandal Hybrid Financial Model implemented in FY22, units are working diligently to align their plans and resources with new performance metrics supporting our strategic initiatives. These plans have been developed from multiple data sources including IPEDs data, student survey data, program reviews, learning outcomes reports, advisory boards, programmatic accreditors, etc.

#### **Specialized Accreditation**

Many [academic programs at the University earned recognition by programmatic or specialized accreditors](#). More than 70 of our degree programs are recognized with this distinction. External accreditation provides the opportunity to assess the mission, planning, outcomes, and goals of our academic programs through an external lens. Additionally, these accreditors help our programs identify current and emerging regional and national patterns, trends and expectations.

## **Annual Program Reviews (APR)**

Academic and student support programs engage annually in guided self-study. Our annual program review (APR) processes provide opportunity for meaningful program evaluation and reflection aligned with the University's strategic plan and initiatives. We have a long history of using our program review process to monitor our internal and external environments for patterns, trends and expectations. In addition to the self-study component, unit plans are reviewed by the division or college, and then the Provost's Office. Feedback on program goals and assessment is provided to units, and program goals are aligned with college and institutional strategic goals and initiatives. Units use the feedback and program assessment to refine goals and assess performance.

The annual program review process provides a rich and consistent data source to help the University, and its many parts, define its future direction and assess its strategic position. Colleges and divisions can consider the findings from this process as they define their future direction, review and revise as necessary, their mission, planning, intended outcomes, and contributions to goals. Flexible and adaptable guidance from administration fosters buy-in from units. Process begins at the unit level, encourages program faculty to collaborate on constructing self-study narrative. Layered review and staggered deadlines provide opportunities to refine.

The University discussed and piloted a revised annual program review process between 2019 and 2021. The new process was implemented in 2021. Previously, all units were required to undergo external program review every 7 years. The revised process also coincided with the adoption of a new assessment management system, Anthology.

### **APR for Academic Programs**

All [academic departments or units complete annual program review](#) annually, by completing or updating their self-study in Anthology Planning (our assessment management system). Generally the department chair or lead is responsible for coordinating the program review within the unit, and is supported by Institutional Assessment. The self-study consists of six templates which includes:

1. [Program mission](#): a statement that defines the program's broad educational purpose and its commitment to student learning and success.
2. [Program goals](#): a minimum of three program goals and indicators of its goals, to measure mission fulfillment by.
3. [Student learning outcomes assessment reports](#): an annual report on the program learning outcomes for each 'program of study.'
4. [Student achievement](#): a report on the program's indicators of student achievement, including student retention, persistence, completion, postgraduate success, and equity gaps.
5. [Demand and productivity](#): a report on internal and external demands for the program's research, degrees, and majors, as well as trends and patterns.
6. [Financial health and resources](#): a report of the program's financial health and how it ensures efficient use of resources.

The self-study is supported by a program-specific dashboard which in its pilot stage, allows programs to review common metrics by program of study. Programs are provided with this data pre-loaded, and are encouraged to review and incorporate this data in their discussion. In addition to this data, programs are encouraged to incorporate data from other sources the program finds meaningful and/or as supporting evidence in their responses. Integration of data reporting systems and guidance to use signature assessments aligned to PLOs improves confidence and reliability. Introduction of embedded data visualization tools enhances overall quality of the experience and communication of key data.

An example program APR dashboard can be seen [here](#).

When the self-study is completed or updated, the college reviews each program's report, and incorporates this data into its own report. Each college completes or updates its own report which consists of four templates:

1. [College mission](#): a statement that defines the college's broad educational purpose and its commitment to student learning and success.
2. [College goals](#): a minimum of three program goals and indicators of its goals, to measure mission fulfillment by. The college also aligns its goals with the University's strategic plan metrics and indicates which of its program's goals align upward.
3. [Program feedback report](#): a report on each program's self-study and or progress.
4. [Strategic recommendations](#): a final list of 3-5 strategic recommendations or actions the college believes are necessary for fulfilling its mission.

The college reports are reviewed by the Provost's Office and aligned with strategic initiatives. An institutional-level report is due annually, summarizing the findings from the process and highlighting achievements. The first report is expected Summer 2022. FY22 was our pilot year for our revised process. Feedback will be used to improve the process for FY23 and the process will be adapted as needed, to align with institutional strategic initiatives and performance metrics.

See **Appendix F** for example reports completed in FY22.

### **APR for Student Support Programs**

All student support programs are systematically assessed against national benchmarks using standards developed by the Council for the Advancement of Standards in Higher Education (CAS). The University adopted the CAS standards to guide our evaluation beginning in 2021. The [program review process](#) is intended to be inclusive and offers feedback by appropriate constituencies and is intended to inform program and institutional effectiveness, evaluate resources, and improve student success.

CAS has been the national leader in developing standards and guidelines for program review since 1979. CAS self-assessment guides (SAGs) are directly available to co-curricular programs and services in Anthology Compliance Assist (our assessment management system). Each SAG contains standards, guidelines and measures for a specific functional area. CAS has developed SAGs for [48 functional areas](#) as of January 2022. Area directors are responsible for coordinating

the program review within the unit and are supported by Institutional Assessment. Program review begins with the program's self-study. Programs are encouraged to approach the self-study as a team, including program leader(s), program staff members, external/campus/community stakeholders, students and faculty, where feasible. The team should bring diverse perspective, in an inclusive and respectful approach.

Each self-assessment guide covers [12 general standards](#) common to all functional areas that are characteristics of quality programs and services:

1. Mission
2. Program and Services
3. Student Learning, Development, and Success
4. Assessment
5. Access, Equity, Diversity and Inclusion
6. Leadership, Management, and Supervision
7. Human Resources
8. Communication and Collaboration
9. Ethics, Law, and Policy
10. Financial Resources
11. Technology
12. Facilities and Infrastructure

When the self-study is complete, a review team from the division provides feedback on each report, which is then also shared with the Provost's Office. Programs use the feedback to inform their action plans. An institutional-level report is due annually, summarizing the findings from the process and highlighting achievements. The first report is expected Summer 2022. FY22 was our pilot year for our revised process. Feedback will be used to improve the process for FY23 and the process will be adapted as needed, to align with institutional strategic initiatives and performance metrics.

Each year, programs will revisit their self-study and provide relevant progress updates. These updates should include addressing any changes to how the program is meeting the standard, updating relevant evidence of each standard and detailing the progress that has been made on the action plan. The first update will occur in 2022-23.

See **Appendix G** for example reports completed in FY22.

## **Program Learning Outcomes Assessment**

All academic programs offered at the University of Idaho lead to the achievement of clearly identified program-level student learning outcomes, consistent with the field and level of study. Program learning outcomes for all degrees, certificates and credentials are published in the [University of Idaho Catalog](#) and accessible to students and the public.

Every major, degree, certificate and/or credential has a set of learning outcomes, which students who complete the ‘program of study,’ should achieve by the time they complete their studies. Program learning outcomes are specific to the field of study and/or industry for which the program prepares students for and may align with an industry or professional organization’s standards for learning. They are unique to each program and level of study. These statements are developed in collaboration with faculty, industry advisors, students and other stakeholders, using disciplinary expertise, employment trends and best practices. Additionally, they are reviewed periodically to ensure they are current.

A minimum of one program learning outcome is assessed each year, with all assessed over a three-year cycle. Some programs choose to assess all outcomes every year. Assessment is the gathering of evidence of student learning and using this data in continuous improvement efforts. This evidence must include a direct measure, where a student is given an appropriate opportunity to show faculty how well they can perform or demonstrate the specific learning outcome. Faculty with content and disciplinary expertise use their judgment to determine how well a student performs on a specific program learning outcome. Responding to assessment data and making curricular changes that leads to measurable improvement for our students, means we have closed the loop and is reason to celebrate.

Assessment data is collected in Anthology Outcomes, and reported annually as part of the Annual Program Review process in Anthology Planning. Programs may also use Anthology Rubrics to assess signature assignments and Anthology Insight to analyze their assessment data by demographic variables and for longitudinal analysis.

Institutional Assessment reviews these reports regularly for quality and effectiveness using the [Quality Assessment Rubric](#) (adapted from James Madison University’s 2015 APT Assessment Rubric). In 2019, the rubric was built in Qualtrics to enhance efficiency. Programs receive a quality score and detailed feedback with recommendations for improving their work. These scores are monitored and analyzed for trends and improvement. Academic programs, colleges and the University, can use this data to better understand our strengths and weaknesses, as well as trends in quality of assessment and improvements to student learning occurring within programs, colleges, or the overall institution. Recent reports are available [here](#).

## **Industry Summit Report**

The University contracted with Agnew:Beck to facilitate a series of five listening sessions with prominent business leaders throughout Idaho. Industry leaders discussed their immediate and future business challenges, as well as what they hope to see in Idaho’s future labor force. A full list of participants and findings is available in **Appendix H**.

Key findings from the listening sessions are summarized below:

1. Idaho is facing an ongoing workforce gap that will continue to widen without targeted workforce development and training
2. The University should invest in data science to address the increasing complexity and demand for technological integration.
3. Idaho's economy and population are rapidly changing, demanding that our educational institutions develop talent that is as technically gifted as it is adaptive.
4. Addressing the challenges of education and industry will require a holistic approach that is targeted and intentional partnerships.



## *Student Learning*

## Student Learning

### 1.C.1.

The institution offers programs with appropriate content and rigor that are consistent with its mission, culminates in achievement of clearly identified student learning outcomes that lead to collegiate-level degrees, certificates, or credentials and includes designators consistent with program content in recognized fields of study.

The University of Idaho offers program with appropriate content and rigor that are consistent with our [mission](#). Additionally, program offerings are guided by the [Idaho State Board of Education's policy on Planning and Delivery of Postsecondary Programs and Courses \(III.Z.\)](#). The purpose of the policy is to ensure Idaho's public institutions of higher education meet the needs of the state with it's programs, while allowing each institution to grow and develop consistent with it's vision and mission. As part of this policy, we deliver programs that true to our statewide mission.

Each program of study culminates in the achievement of student learning outcomes, specific to the discipline and field of study, and published in the [University of Idaho catalog](#). Program learning outcomes are reviewed as part of the curriculum approval process to ensure they are specific for the field of study, and appropriate in rigor for the degree level. Program learning outcomes are reviewed by Institutional Assessment ([Assessment Review stop in workflow](#)) when curricular changes are proposed. Our assessment management system maps program learning outcomes to Bloom's Taxonomy, providing immediate and consistent feedback to programs on the cognitive rigor of the program's learning outcomes. Programs are encouraged to align their learning outcomes and designators with industry-specific frameworks, or to use national interdisciplinary frameworks such as the Degree Qualifications Profile to guide development of outcomes with appropriate content and rigor. Programs are asked to identify the industry-specific or national framework their learning outcomes are aligned to in their annual assessment report. Consistent feedback is also given on the annual assessment report through the [meta-assessment process](#) which includes specific criteria on the learning outcome statements.

### 1.C.2.

The institution awards credit, degrees, certificates, or credentials for programs that are based upon student learning and learning outcomes that offer an appropriate breadth, depth, sequencing, and synthesis of learning.

All degrees at the U of I are based on a curriculum vetted for sufficient breadth, depth, sequencing by a combination of the following methods: disciplinary faculty groups, faculty assessment committees, advisory boards, external constituent groups, peer evaluators, or external disciplinary accreditors. Student learning outcomes at the course level are designed to support program learning outcomes which in turn support the University mission.

For disciplines with external accreditors, breadth, depth, sequencing, and the synthesis of learning is driven by the units' efforts to meet the standards and metrics of the external accrediting body. In many cases this effort to address the external accreditors standards is sufficient to meet institutional needs in the assessment of student learning and achievement. Since all units engage in the Annual Program Review process (APR) units that do not address all the institutional needs in the assessment of student learning and achievement capture that work in that process.

Disciplines without external accreditors go through the curricular approval process for courses at the university level which addresses and determines the strength of the course's breadth and depth. New programs go through the curricular approval process at both the university and state level which addresses and determines the strength of the program's breadth, depth, and sequencing. In both cases (courses v. programs) the synthesis of learning is reflected in the APR process.

All new programs and courses go through the university approval process which includes Unit Curriculum Committee review, College Curriculum Committee review, University Committee on General Education (if a general education course), University Curriculum Committee review, Faculty Senate review and a University Faculty meeting vote. At the state level, new programs are reviewed by the Council on Academic Affairs & Programs (CAAP), Instruction, Research and Student Affairs (IRSA) a sub-committee of the State Board of Education and finally the State Board of Education (SBOE). In addition, new Ph.D. programs receive an external peer review and site visitation delineated and chosen by the Office of the State Board of Education (OSBE).

Previously conducted through the External Program Review (a periodic review), disciplinary programs and degrees are reviewed and maintained by individual unit faculty through the new Annual Program Review (APR) process. In this new APR process units may choose to include an external peer review. General education undergoes a rotating review of syllabi by the University Committee on General Education (UCGE) to review and maintain course for breadth, depth, and sequencing.

### 1.C.3.

The institution identifies and publishes expected program and degree learning outcomes for all degrees, certificates, and credentials. Information on expected student learning outcomes for all courses is provided to enrolled students.

All degrees and certificates have identified program learning outcomes. New program proposals require this information as part of the curriculum approval process. The University of Idaho publishes all program and degree learning outcomes for all degrees and certificates in its [catalog](#), in the Academic Offerings section alongside curricular requirements. Information is available to students and the public before they enroll in a program. Additionally, all updates to these outcomes are reflected in the catalog, when changes to the learning outcomes are implemented.

Students enrolled in courses are provided the course learning outcomes in the syllabi. The University of Idaho's Faculty Senate Handbook requires faculty to dedicate class time in the first class session to discussing the course objectives ([FSH 4700 B](#)) and to provide enrolled students with a syllabus that includes the learning outcomes for the course ([FSH 4700 F-4](#)).

General education learning outcomes are available on the [assessment student webpage](#), the [Idaho State Board of Education's webpage on Statewide General Education policy](#), and on course syllabi.

#### 1.C.4.

The institution's admission and completion or graduation requirements are clearly defined, widely published, and easily accessible to students and the public.

The University of Idaho's admission requirements are clearly defined, widely published, and easily accessible to students and the public on the [Admission's webpage](#). Students and the public can find information based on their type of applicant, and/or situation. [International student admissions](#), [graduate student admissions](#), and [law student admissions](#) each maintain a helpful website detailing the requirements unique to these programs and/or student populations. In addition to these published requirements, students can easily connect with an admissions counselor who can provide answers to all applicants, including those with unique or less common situations. Checklists and timelines are available to students through these webpages.

Graduation requirements are publicly accessible in the U of I catalog, and on many program webpages. This includes the [requirements for each degree or certificate program](#) and the [general requirements](#). Additionally, students can plan and monitor their own progress towards graduation using the [Degree Audit](#) feature in VandalWeb. Here students can see the degree requirements, including any approved exceptions or waivers, and visualize their progress.

#### 1.C.5.

The institution engages in an effective system of assessment to evaluate the quality of learning in its programs. The institution recognizes the central role of faculty to establish curricula, assess student learning, and improve instructional programs.

Active participation in the assessment of learning outcomes is expected of all faculty at the course, program, and university-wide levels, per the U of I Faculty Staff Handbook ([FSH 1565, C-1, A](#)). More information on the faculty role, specifically, is available on the [Assessment and Accreditation Faculty webpage](#).

Additionally, assessment is supported institution-wide by the [University Assessment and Accreditation Committee \(UAAC\)](#), a Faculty Senate supported university level committee. UAAC's function is to facilitate communication on the development and implementation of the program review process, the program learning outcomes assessment, and university-wide student satisfaction surveys. The committee supports the development of assessment activities to ensure a quality education and co-curricular experience, continuous program improvement, and

compliance with accreditation standards. Furthermore, the committee facilitates communication between Institutional Assessment and Accreditation and faculty.

Per the Faculty Staff Handbook ([FSH 1540](#)), faculty has governance over curriculum. Routine change proposals like additions, deletions, and changes to existing curricula, are approved by the [University Curriculum Committee \(UCC\)](#), fulfilling its role of shared governance, and circulated in a [General Curriculum Report \(GCR\)](#) for faculty consideration. More complex changes that require approval by the State Board have additional levels of approval. See the [Curricular Change Handbook](#) for more information about this process.

In addition to providing data, faculty are asked to provide context and interpretation for this data, as well as to make recommendations for curricular changes based on the data collected. The Results Template in **Appendix I** shows the data collected from each assessment. The data is then further reviewed and analyzed by the academic unit as a whole, providing additional opportunity for faculty input, and culminates in an annual report on the quality of learning, and how the data will be used to improve instructional programs.

The annual Student Learning Assessment Report is completed as part of the department's annual program review. The department lead is responsible for completing or coordinating the completion of the [report template](#) for each "program of study" in the department. Multiple data sources are used, including direct measures collected from faculty through signature assignments or course-embedded assignments.

We selected an assessment management system that offers some flexibility, so that programs can determine the best way to assess their students' outcomes. Institutional Assessment and Accreditation offers support for this process, but the process itself is coordinated by the academic unit.

See **Appendix J** for example Student Learning Assessment Reports.

#### 1.C.6.

Consistent with its mission, the institution establishes and assesses, across all associate and bachelor level programs or within a General Education curriculum, institutional learning outcomes and/or core competencies. Examples of such learning outcomes and competencies include, but are not limited to, effective communication skills, global awareness, cultural sensitivity, scientific and quantitative reasoning, critical analysis and logical thinking, problem solving, and/or information literacy.

We have core competencies within our General Education curriculum. The Idaho State Board of Education provides a shared framework for General Education in Idaho, ensuring seamless transfer of courses between Idaho public institutions. The statewide vision for General Education is it "provides students with an understanding of self, the physical world, and human society -- its cultural and artistic endeavors as well as understanding of the methodologies, value systems, and thought processes employed by human inquiry."

This vision is supported by six areas of competency, each with specific student learning outcomes. The six competency areas are:

1. Written Communication
2. Oral Communication
3. Mathematical Ways of Knowing
4. Scientific Ways of Knowing
5. Humanistic and Artistic Ways of Knowing
6. Social and Behavioral Ways of Knowing

The complete list of courses classified within each competency is available in the [U of I catalog](#). The student learning outcomes for each of the six competency areas is publicly available in the [Idaho State Board of Education's Policy on Statewide General Education](#), the [General Education Assessment Strategy](#) webpage, and through the [U of I assessment webpage for students](#). These learning outcomes are reviewed and approved by disciplinary representatives from each Idaho public institution.

Oversight of general education courses and assessment of the six areas of competency, is the responsibility of the Director of General Education. The learning outcomes are published on syllabi, and all instructors teaching a general education course are expected to contribute assessment data each semester. Data is collected in the U of I's assessment management system, and the Director of General Education analyzes and disseminates findings annually. More information on the General Education Assessment Strategy is available [online](#).

Course proposals for new general education courses or newly designated courses, are reviewed by the Faculty Senate appointed [University Committee on General Education](#). This same committee advises the Director of General Education on program refinement and continuous improvement efforts.

1.C.7.

[The institution uses the results of its assessment efforts to inform academic and learning-support planning and practices to continuously improve student learning outcomes.](#)

#### Efforts to Improve Student Learning Outcomes

The results of student learning assessments are reviewed by program faculty at least annually. Each program is expected to coordinate the review locally, and report on this review centrally, as part of the annual program review process. In most cases, student learning assessments are coordinated by the department chair or other unit lead, who is tasked with ensuring that assessment results are reviewed by program faculty and used to inform curricular decisions. Evidence of this review and data-informed decisions are documented and shared with college and institutional leadership. Programs are encouraged to:

- Ensure the impacts of curricular decisions on programs of study and its outcomes are carefully reviewed

- Consult faculty from other disciplines when reviewing or discussing findings
- Consult with learning support services -- both specific and institution-wide -- on academic needs identified from assessment efforts
- Consult with advisory and/or alumni groups
- Engage students in review and discussion of findings

### Effective System of Assessment

Program learning assessment is reported centrally, using a standardized process. All programs of study participate in this process. The process is supported by an assessment management system (Anthology) with oversight from a dedicated full-time staff position. The Provost's Office, and/or designee, consults with stakeholders and establishes criteria for assessment plans based on best practices. Feedback on efforts to assess learning is provided regularly to all programs, as part of the meta-assessment process, using the Quality Assessment Rubric. Data collected from the meta-assessment process demonstrates continued improvement of assessment quality and provides an opportunity to benchmark against peers, by using a quality rubric designed by James Madison University and adapted for use at institutions nationwide. More information on the meta-assessment process is available [here](#).

### Learning Support Services

Tutoring & College Success supports students in their educational endeavors by providing academic success strategies through Academic Coaching, SI-PASS, and Tutoring.

Academic Coaching is an interactive student support resource focused on students developing and enhancing their academic skills. Students can receive support in a variety of ways.

- 1.) Individual Consultations: All students can talk directly with the Academic Coaches in-person, over the phone, Zoom.
- 2.) Academic Coaches serve as Instructors for INTR 101 (College Success Strategies): This class will provide students with a foundation for achieving their academic goals, charting a path for future professional success, and appreciating the value of lifelong learning. We offer this course during the early and late eight weeks of every semester.
- 3.) Academic Coaches hold workshops and presentations: Workshops are regularly held on many academic skills including time management, study strategies, critical reading, note taking, goal setting, and how to prepare for an exam.

Supplemental Instruction Peer Assisted Study Sessions (SI-PASS) provides regularly scheduled, peer-led study sessions for difficult courses. All SI-PASS Leaders work closely with faculty and professionals in Tutoring & College Success to prepare study session material to best help students learn. SI-PASS sessions are held multiple times a week in-person and focus on better understanding the course material through collaborative activities. SI-PASS is free and available to all students enrolled in SI-PASS supported courses. Students who regularly participate in SI-PASS statistically earn higher grades in classes than their peers. Each semester SI-PASS Leaders

support 15-20 courses.

Vandals Tutoring is a free service provided to all Vandal students. Tutoring is available for over 250 courses sections. Students can receive support in many different ways. First, students can attend Drop-in Tutoring on the 2nd floor of the Library. Secondly, tutoring is available via appointment Monday-Friday 9am-9pm. Appointments are held online via Zoom and in-person at the Library. Instructors and staff members can also make referrals in VandalStar for students who may need assistance. Finally, group tutoring workshops are also available for many courses during the semester.

Faculty and staff are able to connect students with resources in three ways, using VandalStar:

1. Referral tracking items are a warm hand-off in which a message is sent both to the student and the resource office (e.g. Tutoring) notifying both that the student is interested in accessing a particular resource. The resource office then follows up with the student.
2. "I Need Help" flags can be raised directly by the student to notify a resource office that they need assistance. The resource office then follows up with the student.
3. My Success Network shows students the individual people on campus who are connected to them in a variety of areas (e.g. academic advisors, instructors, TA's, SI-PASS leaders, tutors, college librarians, etc.). It also provides students, faculty, and staff a searchable directory of services offered by U of I which includes descriptions, links, and contact information.

VandalStar is the primary way that professional advisors make referrals to support offices on campus. However, advisors also facilitate verbal referrals to campus resources as well as physically walking a student to a support office when the situation calls for that type of handoff. Usually this would be for a student in crisis and in need of immediate support via the Counseling and Testing Center.

### The Writing Center

Undergraduate and graduate students are offered [support services](#) with academic and extracurricular writing projects at the [Writing Center](#). Students from all colleges use this service each semester. Support offered includes peer-tutoring, group writing opportunities, writing resources, and graduate writing support. All services and resources are free to all members of the university community, including students, alumni, faculty, and staff.

### One-to-One Peer Tutoring

Our peer-tutoring model offers one-to-one tutoring, both in-person and online. Tutoring sessions are 30- or 60-minute sessions are available by appointment or on a drop-in basis. Students are offered up to four sessions per week, although requests for additional appointments are generally accommodated. Tutoring sessions include meetings, or asynchronous written feedback on written drafts. [Peer tutors](#) receive a semester-long formal training through ENGL 402, a service-learning

internship course. Professional development and continued training is available to tutors beyond ENGL 402. The Writing Center employs up to 20 students as peer tutors, each semester.

### Group Tutoring/Writing

The Writing Center provides support for the First-Year Composition program's ENGL 109 co-requisite program. English 109 students are led and tutored by students training in writing tutoring pedagogy. To promote a culture of writing, the Writing Center offers creative writing circles and interactive workshops. Creative writing circles are 90-minute sessions of prompted writing, workshop-style feedback, and guest presentations.

### Additional Resources

The Writing Center is also a quiet space to write independently, or with help on-hand. The center offers access to desktop and laptop computers, a printer, composition textbooks, and [reference and style guides](#). Advisors and faculty may bring small groups or individual students to the center to introduce them to the available resources. All students enrolled in ENGL 109 (co-requisite program), CAMP, and TRiO Student Support Services visit the center for a brief orientation.

### Graduate Writing Support

The Writing Center has a graduate writing consultant (GWC) focused specifically on graduate student writing across disciplines. The GWC is available year-round. Sessions are generally an hour long and can be in -person or online. Graduate students can work with the Writing Center's peer tutors, but for assistance with dissertations, manuscripts, and proposals, students are encouraged to meet with the GWC.

### 1.C.8.

[Transfer credit and credit for prior learning is accepted according to clearly defined, widely published, and easily accessible policies that provide adequate safeguards to ensure academic quality. In accepting transfer credit, the receiving institution ensures that such credit accepted is appropriate for its programs and comparable in nature, content, academic rigor, and quality.](#)

Detailed information on how the U of I evaluates transfer credits can be found [online](#). Students or applicants can [use a self-service tool](#), *I Transfer*, to see how credits may transfer to the U of I. Transfer credits are accepted from all regionally accredited institutions. [Transfer guides](#) are publicly available, showing transfer course equivalencies based on previously evaluated transfer courses. Students can also submit a Transfer Course Evaluation Request, for courses not previously evaluated. Decisions are shared by Faculty committee and the Office of the Registrar. If no direct equivalency is available, the decision is deferred to the chair of the department offering the course. Information on transfer pathways is also available to students and the

public [online](#). The U of I also complies with the [Idaho State Board of Education policy on Articulation and Transfer](#).

#### Credit Review Process for Unaccredited Institutions

[Academic departments review requests](#) to transfer credits from institutions that are not regionally accredited and make a recommendation, with a final decision made by the [University Curriculum Committee](#).

#### Prior Learning Credits

The U of I follows the [Idaho State Board of Education policy on prior learning](#). This policy is available in the U of I catalog as [alternate credit opportunities](#). Examples include receiving credit for military courses based on the American Council of Education (ACE) guide (I-2-e), and/or awarding credit for work, community, or volunteer experiences based on demonstrated learning outcomes (I-2-b) approved by an ad hoc committee of college/department representatives. Students can submit the [Application for Challenge](#), the [Petition for Experiential Learning Credit](#), or the [Vertical Credit Application](#) to initiate the appropriate request. Specific policies and procedures for all alternate credit opportunities are publicly available [here](#). See the Fall 2021 Prior Learning Credits Report in **Appendix V** for recent credits awarded.

#### 1.C.9.

The institution's graduate programs are consistent with its mission, are in keeping with the expectations of its respective disciplines and professions, and are described through nomenclature that is appropriate to the levels of graduate and professional degrees offered. The graduate programs differ from undergraduate programs by requiring, among other things, greater: depth of study; demands on student intellectual or creative capacities; knowledge of the literature of the field; and ongoing student engagement in research, scholarship, creative expression, and/or relevant professional practice.

A complete listing of graduate programs is available on the [Graduate Admissions webpage](#), including [graduate student admission requirements](#). Information on graduate programs is also published in the [U of I Catalog](#).

The College of Graduate Studies was formally organized in 1925 (then designated as the Graduate School) but the university has awarded advanced degrees since 1897. The College of Graduate Studies encompasses all graduate programs of the university but does not supervise programs in the College of Law. This coverage of all regular disciplines, interdisciplinary programs, and professional fields provides a wide variety of academic programs. Enrollments are large enough to make possible the vital interchange of ideas among students and between students and faculty necessary for graduate programs and yet enrollments are sufficiently small to permit close faculty-student relationships. Interdepartmental cooperation is an important factor on the Idaho campuses. The University is the chief research center for the state and as such operates active graduate programs in most areas providing a broad research base upon which graduate programs have been built.

The Graduate Council is the representative body of and is empowered to act for the Graduate Faculty. It is responsible to and reports to the Graduate Faculty, which retains the authority to review actions of the council. Its function is to promote graduate instruction and research, to formulate policies and long-range plans for the graduate programs, and to review and act on student appeals and petitions that involve exceptions to accepted regulations and procedures of the College of Graduate Studies.



## ***Student Achievement***

## Student Achievement

### 1.D.1

Consistent with its mission, the institution recruits and admits students with the potential to benefit from its educational programs. It orients students to ensure they understand the requirements related to their programs of study and receive timely, useful, and accurate information and advice about relevant academic requirements, including graduation and transfer policies.

Recruiting practices follow the university's [admissions](#) process utilizing both university [admission requirements](#) and Idaho State Board of Education Admission Requirements ([SBOE Policy III.Q.](#)). Recruitment is conducted by the Office of Strategic Enrollment Management in coordination with colleges, academic units and [admissions officers](#) placed in key market areas.

Prior to orientation, the university promotes [UIdaho Bound](#), a program offered over twelve sessions in spring and summer. The program hosts student activities including getting a student ID and e-mail account, meeting with a college advisor, registering for classes, meeting with a financial aid counselor and reviewing the financial aid package, exploring the campus, and learning about extracurricular clubs and activities. Prospective students are also introduced to many campus resources that support student [health](#), [academics](#), and [engagement](#).

Onboarding and orientation include a variety of programs that accommodate the diverse needs of our future students. General information regarding orientation can be found at [Vandal Welcome](#). Beyond general orientation there are specified orientations for the [College Assistance Migrant Program](#) (CAMP), [Fraternity & Sorority Recruitment](#), [International Student Orientation](#), [Military Family Welcome](#) and [Naval ROTC Orientation](#), [Marching Band Camp](#), [Honors Program](#), Medical Science Orientation, College Orientations and [Vandal Ventures](#). Orientation is comprehensive and hosted by staff, faculty, and administration to deliver content and provides opportunity for community involvement.

First time students are oriented to the [general requirements](#) for academic procedures and graduation which are aligned with State Board of Education Policy ([SBOE III.E.](#)). Transfer students are oriented to the university's [transfer policies](#) which are aligned with State Board of Education Policy ([SBOE III.V.](#)). In both cases, a robust [university advising service](#) supports students with university academic regulations, academic pathways, resources, and transfer procedures. First time students are oriented to both VandalStar (our advising system) and Degree Audit (an individualized and on-demand audit of the student's curricular progress toward degree completion). Transfer students also participate in orientation and are notified by email when their transfer credit has been evaluated. This e-mail details how the transfer work was evaluated for each course and provides instructions on how to view the student's updated degree audit. International students attend orientation during the first week they arrive to our campus. The

onboarding and orientation programming is condensed and takes place through collaboration with the offices mentioned above and the [Office of International Programs](#).

Figure 8: Orientation Attendance Data

Year	Incoming UG Enrollment (Including Transfers)	Registered	Attended	Percent of Incoming UG Students Registered	Percent of Incoming UG Students Attended
<b>Fall 2020</b>	1,898	1,105	No Data	58%	No Data
<b>Spring 2021</b>	238	88	No Data	36%	No Data
<b>Fall 2021</b>	2,180	1,534	899	70%	41%
<b>Spring 2022</b>	281*	216	49	76%	22%

\*Unofficial – based on 10<sup>th</sup> day report as of 1-26-22

### **Orientation Feedback & Survey Data**

Post-Programming surveys are sent to students via Slate 24 hours after event. Survey is sent one time for each orientation cycle

Figure 9: Fall 2021 Programming Feedback



## **Participatory Processes**

New Student Orientation programming is open with equal access to all incoming new to UI students on the Moscow campus (including transfer and nontraditional populations).

Attendance at New Student Orientation is encouraged but not required.

## **Evidence of Orientation Success**

When we compare our official IPEDS first year cohort for those who came back one year later vs. those who did not, those who attended orientation were retained at a higher rate.

COHORT_TERM_CODE	YEARS_OUT	Orientation	STATUS	Frequency	
202010	1	Attended Orientation	GONE	188	
202010	1	Attended Orientation	HERE	701	78.9%
202010	1	Did not Attend	GONE	189	
202010	1	Did not Attend	HERE	347	64.7%

Students who attend orientation are more involved and more likely to do well academically. Data represents the end of term grades for the two first year cohorts in both Fall 2020 and Fall 2021. Students who attended orientation pass more of their classes during their first Fall term:

TERM_CODE	Orientation	Pass_Fail	Frequency	
202010	Attended Orientation	Fail / Withdraw	756	
202010	Attended Orientation	Pass	4625	86.0%
202010	Did not Attend	Fail / Withdraw	685	
202010	Did not Attend	Pass	2425	78.0%
202110	Attended Orientation	Fail / Withdraw	1020	
202110	Attended Orientation	Pass	6354	86.2%
202110	Did not Attend	Fail / Withdraw	564	
202110	Did not Attend	Pass	1952	77.6%

## **Reflection**

Our onboarding and orientation programs prepare our students well for academic studies. Our analysis shows that students who do not participate in the programming are not as successful, and some may not matriculate to the university. Our programming is well-supported and planned by a dedicated and collaborative team of professionals. The melt rate for students who are admitted and registered for courses through UI Idaho Bound is about 12%. While this level of “melt” is consistent with national trends, we see an opportunity to improve.

We invested significant resources to explore possible improvements for our onboarding processes and its impact on future enrollment. We also invested time and funding to engage an outside consultant, RNL, in helping us identify opportunities for improvement. We developed several strategies to consider that can improve the onboarding process. Some of these strategies include further assessment of our existing programs, development of a multi-faceted first year

communication campaign, an online foundations module, an upgrade to our CRM, and the implementation of a First Year Experience program. In addition, we are exploring the benefit of providing earlier registration opportunities for our incoming students. We also tested a remote UIIdaho Bound program where orientation is delivered in the student's region allowing families to participate locally. We implemented online or virtual delivery to serve a similar purpose.

We continue to adjust our programming to better serve our students and their families evolving needs. For example, we increased events from two per year to around twelve to better accommodate family schedules prior to the fall semester.

Our onboarding programs at the University of Idaho are effective and accessible, but we do see the melt rate as an indicator of why we should not become complacent with our efforts. We will continue to use a variety of data, feedback, and market research to better serve our constituents.

#### 1.D.2

Consistent with its mission and in the context of and in comparison, with regional and national peer institutions, the institution establishes and shares widely a set of indicators for student achievement including, but not limited to, persistence, completion, retention, and postgraduation success. Such indicators of student achievement should be disaggregated by race, ethnicity, age, gender, socioeconomic status, first generation college student, and any other institutionally meaningful categories that may help promote student achievement and close barriers to academic excellence and success (equity gaps).

We believe in the power of data-driven decision making to improve student achievement by measuring and sharing student performance metrics within and outside the boundaries of the institution. Through analytics, we seek to improve internal data literacy and meaningful use of data to successfully guide decision-making. This allows for a student-centric policy while being mindful of student confidentiality.

Student achievement indicators are integrated into many different institutional processes and several different stakeholders regularly engage with student achievement data. Leadership has access to, and many regularly view, dashboards for historic trend data. They are also provided weekly enrollment reports through the Registrar's Office, often supplemented with analysis from Institutional Research. Executive leadership, academic advisors, grant writers, and other individuals with a legitimate educational purpose have access to detailed dashboards which allows them to organize and view data for different demographics in their area(s) of interest. We are actively working on providing benchmarks and all employees have access to a recently created IPEDS benchmark dashboard. The dashboard summarizes key IPEDS metrics for our peer institutions as well as other schools in IPEDS relative to our institution.

Externally, we are mindful of our duty to state and federal reporting and supplements mandatory reporting with data summaries and reports available on the [Institutional Research](#) (IR) website. Internally, we promote data literacy and use of student achievement data throughout the institution with dashboards with the appropriate level of access for individual employees. Dashboards with counts of five or more are shared with all employees, while dashboards with smaller counts are reserved for employees with a valid educational reason to view the data. This

is to protect student confidentiality per FERPA. With this data, the institution monitors persistence, completion, and retention rates in addition to post-graduation success. These are compared against both institutionally listed peers and aspirational peers.

We participate in broad survey reporting for major institutional reports, including the National Survey of Student Engagement (NSSE), student satisfaction surveys, and many others. We also participate in the “[Common Data Set](#)”, leveraging common institutional definitions across the nation. The university provides disaggregated credit hour, degree, enrollment, retention, and graduation data, as well as in-depth survey dashboards available on the [institutional dashboards](#). While we have long used student success metrics, these processes will be codified through the use of an external consultant (Ruffalo Noel-Levitz) on the academic side, as well as systematically reported metrics on the non-academic side.

The university places a strong emphasis on advising to support student achievement. Students are guided by professional advisors for the first two years and college advisors generally lead student advising for the remainder of the degree. Advising relies on internal reports tracking students who are eligible but have not enrolled for an upcoming term. Reports include retention cohort identifiers and many other attributes to help focus outreach on vulnerable student populations. All advising is guided by “[VandalStar](#)” (our advising system).

Faculty and courses are evaluated by [student course evaluations](#) and post-graduation success is monitored through [the graduating senior survey](#) (GSS). The [NACE First Destinations survey](#) (NACE) collects data annually from our graduates, using national demands and standards. Examples of information collected includes first job or graduate admissions status, job search activities, and motivation for pursuing their degree or occupation. Institutional Research has collaborated with Career Services to obtain data to supplement our understanding of career success post-graduation. Institutional Research and Career Services are actively working to improve our understanding of career outcomes.

University-wide data is also used to improve financial efficiency, inform advising, guide decision making, and improve strategic enrollment management. Financially, the University Division of Finance and Administration provides bond agencies and the State Board of Education with U of I metrics to evaluate the financial health of the institution. These metrics include audited financial reports as well as traditional financial metrics which are tied to academic effectiveness and prioritization.

Our peer institutions were identified in conjunction with the State Board of Education office and were updated in 2019. Peer institutions have a role and mission similar to ours. Criteria for selecting peers include the student profile, enrollment characteristics, research expenditures, and academic disciplines and degrees offered. Our [peer institutions](#) are listed on Institutional Research’s website and periodic reviews are conducted under the direction of the State Board.

## **Reflection**

Persistence rates at the institution remain constant or show indications of a rising trend. First term persistence for students has risen 3% over the last three years. For second term students,

the figures have remained relatively flat but constant. Third term persistence shares the same indication of a rising trend as first year persistence (3%).

The University is currently engaged in a Strategic Enrollment Process (SEP) process with Ruffalo-Noel-Levitz to identify not only the potential causes of this persistence but to envision academic and non-academic programs that will create more engagement and persistence. The Office of the Provost is engaged in a degree mapping project in collaboration with APLU to identify both bottlenecks and overly complex curriculum. The Office of the Provost is also engaged in developing, with faculty, new academic programs that address 21<sup>st</sup> Century issues of importance to students.

Graduation rates at the institution show rising trends for 4-year and 6-year measure and a constant (flat) trend for 8-year graduation rates.

- 4-year trends (reflected here as 9-year analysis) have seen students who are considered 'gone' decrease by 4% since the high point of 41% in AY 10-11 to a current level of 36% in AY 17 -18. Graduations climbed to 41%, an increase of 10% over nine-years of data and a constant 1% over the last four-years of record. Students remaining after four-years dropped by 12%.
- 6-Year trends reflected here as a 7-year analysis, have seen students who are considered 'gone' decrease by 3% since the high point of 43% in AY 11-12 to a current level of 39% in AY 15 -16. Graduations climbed to 59%, an increase of 4% over seven-years of data. Students remaining after six-years dropped by 3%.
- 8-year graduation rates (reflected here as 5-year analysis) show trends that remain relatively flat at 40% 'gone', 59% graduating and 0.8% remaining 'here'.
- Current cohort completion rates of graduations dropped to 74% from a high point in AY 17-18 of 81% (please see enrolment analysis)

Enrollment since the institution's last accreditation has seen constant flux. This year the institution is experiencing a positive 5% increase in enrollment creating a great sense of relief. This is a net decrease of 2% since the institutions last accreditation. While COVID-19 and shifting pedagogical modalities have a large role to play in the 2020 decrease, the overall 10-year decline in undergraduate enrolment at the institution by 22% merits further exploration of improving the go-on rate of second-term students at the institution as well as strategizing how to improve go-on rates of statewide high-school students.

Compared to our institutional peers utilizing IPEDS data, the University of Idaho ranks in the middle on most metrics. There were five peers above the University of Idaho, one at the same level and seven peers below this threshold. The predominant peer leaders in all areas are Colorado State University-Fort Collins, University of Nebraska-Lincoln, and Oregon State University. Utilizing and examining the Department of Education: College Scorecard, these graduation rates are corroborated. However, the University of Idaho has the lowest cost to students of this peer group and garners the second highest salaries. What is evident is the low return rate of first-year students compared to these predominant peers. We are working to improve this by centralizing advising, enrollment management and student services. And while

the DWF rate in STEM and other academic programs is declining, the University needs to remain focused on this data point.

The National Survey of Student Engagement (NSSE) has interesting peer benchmarking data. In the 2020 freshmen response to High Impact Practices (see **Appendix K**), the University is on par with its peers, and all public rural and public higher education institutions. However, in the senior year, we lead our peers in this area (71% to 64%), western public rural institutions (71% to 46%) and all public higher education institutions (71% to 59%). For freshmen, efforts should be made in strengthening service learning, re-establishing learning communities, and extending research with faculty to the first-year experience. At the senior level, we could strengthen service learning as the other HIPs in the report are above our or on par with their peers.

Peer indicators for the NSSE 2020 Engagement Indicators were (see **Appendix L**):

**Academic Challenge:** First-year students are on par with our peers in “higher-order learning,” “reflective & integrative learning,” “learning strategies” and “quantitative reasoning.” Seniors show a drop in “higher-order learning” and “learning strategies.”

**Learning with Peers:** First-year students are on par with our peers in “discussions with diverse others” and lagging in “collaborative learning.” Our seniors echo the results in “collaborative learning.”

**Experiences with Faculty:** First year students are on par with our peers in “student-faculty interaction” and ahead in “effective teaching practices.” Seniors are on par with our peer institutions on both indicators.

**Campus Environment:** First year students are on par with our peers in “quality of interaction” and “supportive environment,” whereas seniors are lagging our peers in “supportive environment.”

In respect to the top 50% and 10% of institutions nationally the U of I show’s strength in “quantitative reasoning.” The institution should address “collaborative learning” at all levels and examine the areas of “higher-order learning,” “learning strategies,” and “supportive environment” at the senior level. We expect there is a correlation among these three areas. Academic challenge without learning support or resources will lead to dissatisfaction.

### 1.D.3

The institution’s disaggregated indicators of student achievement should be widely published and available on the institution’s website. Such disaggregated indicators should be aligned with meaningful, institutionally identified indicators benchmarked against indicators for peer institutions at the regional and national levels and be used for continuous improvement to inform planning, decision making, and allocation of resources.

The University of Idaho believes in the power of data to guide policy, improve student outcomes, and inform institutional efficiency and effectiveness. The internal Institutional Research (IR) [university dashboards](#) are designed to provide student success metrics for sub-

populations and provide internal benchmarks. Student groups can be compared to the overall university standard or over time for each group to ensure student success by continuing to address student needs in academics, health and cocurricular engagement. Internal benchmarking allows for in-depth monitoring of specific students to identify gaps in student needs and build the types of programs that are currently delivered, ongoing and constantly improving.

Our student success programs include the Center for the Enhancement of Teaching & learning (CETL), Center for Disability, Accessibility & Resources (CDAR), Counseling & Testing Center (CTC), Advising Services, and Career Services (see **Appendices M to R**). Institutional Research works extensively with Strategic Enrollment Management to create custom reports for individual offices to improve [student retention](#). Updates on student retention are also sent to the Office of Multicultural Affairs (OMA), [College Assistance Migrant Program](#) (CAMP), [Native American Student Center](#) (NASC), TRIO, University Honors Program, [Military and Veteran Services](#), and [Center for Disability Access and Resources](#) (CDAR). These reports track student cohorts (retention and graduation rates, as per IPEDS) for these specific populations. While internal benchmarking is fundamental to monitoring student success for specific programs, external benchmarking provides regional and national standards to ensure we are maintaining and improving our ability to efficiently provide services on a larger scale. The [Integrated Postsecondary Education Data System](#) (IPEDS) is widely recognized as the gold standard on data across schools in the United States. Institutional Research downloads these databases and provides comparison reports of our peers as well as state-by-state comparisons for retention, enrollments, completion, and online trends.

## **Reflection**

At the University of Idaho, ongoing internal and external indicators of student success are used for continuous improvement in addressing student mental health, student social engagement, student advising, future careers and academic success. The examination and use of data is driving these multiple initiatives to ensure student success. The decision making and allocation of resources is strongly coupled to data and directly engaged in supporting the student experience to ensure student success.

Since 2015, we have grown our capacity to support and improve student achievement and success initiatives (See **Appendices M to R**). The following initiatives are cited as context. Academically, [University Advising Services](#) (UAC) has implemented a new centralized advising system, VandalStar, for students in their first two years. The system identifies students in need and intervenes earlier than has historically been done. Strategic Enrollment Management engaged in a pilot program called the [Vandal Gateway Program](#) (VGP) which allows select cohorts of first-year students who did not fully meet admission requirements admission to the university. This variance of admissions policy has full faculty approval. Finally, [Student Support Services](#) initiated a pilot program called the Vandal Engagement Program (VEP) which intervenes for ‘Regulation L’ students who are on probation and/or disqualification and who are not associated with a college intervention process. This program, like all college programs focuses on developing the academic skills for success and supporting students who fall into academic difficulty.

To address student academic engagement, the [Office of Undergraduate Research](#) (OUR) conducts an annual university wide undergraduate symposium, provides enhanced research and travel grants funded both internally and externally (State Board of Education, Higher Education Research Council, National Science Foundation) and supports the integration of the Course-based Undergraduate Research Experiences (CUREs) program.

To address the growing need for student mental health in the ‘age of the pandemic’, the [Counseling & Testing Center](#) engages in these growing concerns and instituted the Group Counseling Program, adding additional professional staff to handle the increasing case load, developed, and instituted trained departmental liaisons to identify students in need and updated and improved their psychological testing services.

To address improved instructional delivery, the [Center for the Enhancement of Teaching & Learning](#) (CETL) has engaged in the development of Learning Centered Instruction (LCI) which maximizes teaching strategies designed to create significant learning experiences, developed the Technology for Learning (T4L) program which creates a mindset on how different educational technologies can be used to create significant learning experiences and the Learning Centered Instruction/Diversity, Equity, and Inclusion (LCI/DEI) program that imparts strategies to enhance accessibility and inclusion in our courses and programs.

To address student post-success, [Career Services](#) has developed a Liaison Advising Model which utilizes a specialist model based and located in the disciplines/colleges which is a move away from the previous centralized model. The new model has a focused eye towards diversity and equity. The Liaison Advising Model coupled with career readiness certificates, expanded interdisciplinary internships and the Vandal Alumni Mentoring program provide a solid base for career readiness.

#### 1.D.4.

The institution’s processes and methodologies for collecting and analyzing indicators of student achievement are transparent and are used to inform and implement strategies and allocate resources to mitigate perceived gaps in achievement and equity.

The University of Idaho (U of I) is guided by its [Strategic Plan](#), which tracks key student metrics, including enrollment, completions, and retention to guide and measure institutional progress in accordance with the State Board. U of I also consistently solicits student [feedback](#) on courses and provides summary reports to leadership. Reports from Summer 2020 onwards are housed in Anthology and access is provided and maintained by Institutional Assessment. Anthology is supplemented by Institutional Research reports to provide an historic perspective. These reports are incorporated into the Provost Office’s [promotion and tenure process](#) which ensures that student success in the classroom is an important factor for faculty seeking professional advancement.

#### **Annual Program Review / Academic Programs**

We are using a new assessment management system (Anthology) to engage in [Annual Program Review](#) (APR). The process integrates data from learning outcomes assessment, student

achievement metrics, and identified equity gaps. Individual faculty report assessment data from signature assignments or course-embedded assessment, which the program analyzes against goals in an annual report. Annual programs reviews include all metrics found on the institutional dashboard and reflect on changes in retention, persistence, and equity gaps. The Annual Program Review process informs the allocation of resources to drive new programs, student achievement initiatives, and strategic investments.

### **Annual Program Review / Non-Academic Programs**

We are actively working on creating metrics to measure non-academic areas in [Annual Program Review](#) for cocurricular programs and services. This year, non-academic programs piloted the Council for the Advancement of Standards in Higher Education (CAS) templates for self-assessment of their functional area and collect a baseline of metrics in the new Anthology system. The Annual Program Review process for non-academic units also informs the allocation of resources to drive new programs, student achievement initiatives, and strategic investments.

Other efforts to engage in non-academic assessment are driven by individual organizational units. For instance, Information Technology Services (ITS) recently surveyed customer satisfaction of employees, to include their operational programs, and services. In the critical area of diversity and equity, Yolanda Bisbee, Chief Diversity Officer and Director of Tribal Relations, is currently tracking retention for the College Assistance Migrant Program (CAMP), Office of Multicultural Affairs (OMA), and Native American Student Center (NASC) to improve student achievement, access, and equity gaps. The presidents' Diversity Council established a Diversity Action Plan (**Appendix S**) in which all colleges have diversity teams establishing 8 goals within each college. This will eventually expand to having individual departments set equity action goals in tandem with college goals. Data is being collected to establish a baseline and will be reported out in April. Finally, the Center for Disability, Access and Resources (CDAR) uses weekly reports to gain insight and a better understanding of the population(s) they work with at CDAR. They are establishing a baseline to have meaningful student achievement metrics to track over time. While still in the early stages of developing exact metrics, and how those metrics will drive feedback for our programs and services, the indicators of institutional success are driving this work.

### **Allocation of Resources**

The [Vandal Hybrid Model](#) incorporates enrollment and persistence to build budgets for upcoming academic years. Within the hybrid model, University Operations (The President's Office and associated units, Division of Finance and Administration, Information Technology Services) are provided consistent base funding to account for the cost of doing business in the annual budget. Additionally, each unit has two performance metrics: 1) Span of Control metric outlining each unit's specific goal to increase span of control and decrease administrative layers to reduce any waste and efficiently manage operations and 2) Customer Service or Efficiency metric outlining a specific goal for each unit to implement process improvement measures to improve service to customers (internal/external) or increase efficiency of operations to free up resources for more fruitful work, improve the quality of work, or reduce costs. These metrics are

set at the beginning of each fiscal year through discussions with executive leadership. A percentage of additional budget dollars available due to any increase in tuition collected is allocated to University Operations through the hybrid model. Executive leadership then determines use for these funds within University Operations based on the demonstrable needs of the units and achievement of the stated goals outlined in the metrics determined at the beginning of each fiscal year. The hybrid model drives new program development, student success and achievement initiatives, and strategic investments or disinvestments to further mission accomplishment.

### **Curricular Process**

A combination of college and unit metrics from the Vandal Hybrid Financial Model and the Annual Program Review in Anthology inform the health of academic programs and support the development of new academic programs. New programs are approved first internally and then externally. The internal process of developing new programs consists of multiple steps. Faculty forward new program ideas to the college. If there are sufficient college resources, they are approved and forwarded to the Provost Review Council, a Provost level review including representation from each college. If there are more programs than funds, the college must prioritize and forward them in ranked order to the Provost Review Council. The Provost Review Council after deliberation, and after forming its own prioritization, places the proposed new programs on the State Board of Education's 3-Year plan. Once on the 3-Year plan, programs move through the final internal process which includes the University Curriculum Committee, University Senate, and a University Faculty Meeting vote of approval. The external process includes review at the Council on Academic Affairs & Programs (CAAP) which is a council of provosts from all universities in Idaho, then it moves to the Instruction, Research, Student Affairs Committee (IRSA) which is a sub-committee of the Idaho State Board of Education (SBOE) and then finally to SBOE for final approval.

### **Reflection**

The U of I has always used metrics of student achievement to guide mission accomplishment. Program prioritization and the Vandal Hybrid Model have created major institutional change to our indicators for success, use of the metrics, and resource allocation process. It also created a proactive 'culture of assessment'. To gain a historical perspective on this shift please see the State Board of Education update report on the program prioritization process at the U of I in August of 2019 (see **Appendix T**).

To better align resource allocations to metrics, the university has launched a new annual program review process, financial model, and robust dashboard of student and program achievement data and indicators of success outlined above. However, it is important to note that two parts of our institutional resource allocation model have been latent for two-years. This is primarily due to the incremental transition to the Vandal Hybrid Model. The Institutional Planning and Effectiveness Committee ([IPEC](#)) is responsible for the implementation and coordination of the institutional assessment plan and oversees several key processes which

include college cascaded plans, program prioritization, the faculty incentives subcommittee, institutional efficiencies, and effectiveness initiatives. The establishment of the new University Assessment & Accreditation Committee (UAAC), the ownership of the institutional assessment plan has further complicated the role of IPEC. The role of IPEC in the Vandal Hybris Model is under development.

Finally, COVID-19 effects on the institution and resulting corrections have slowed this process. The University Budget and Finance Committee ([UBFC](#)) is charged with making recommendations for resource allocation, consistent with university planning and implementation. We expect that both IPEC and UBFC will be engaged in this year's planning and allocation of resources. Both committees are advisory to the president, who along with the president's cabinet, and with input from other units as solicited (e.g. University Senate, Senior Leadership Council, Academic Leadership Council), make final decisions about planning and resource allocation in the service of mission fulfillment. With the codified expectations of the new 2020 NWCCU standards, U of I is beginning to address equity gaps more fully at the disaggregated level and these metrics are being folded into performance metrics. Now that the hybrid model has the support of the Academic Leadership Council (Dean's) and Senior Leadership Council (Vice Presidents'), U of I needs to take the final implementation steps in folding in these two committees on these integrated models to direct investment and the allocation of resources.

## Addendum: PRFR Recommendation Follow-Up & Resolution

### PRFR 2.E.2.

#### Recommendation:

*That “meaningful opportunities for stakeholders” are in place in the Vandal Hybrid Financial Model so that Faculty, Staff, Alumni, and other stakeholders are included.*

#### Response:

President C. Scott Green contends that the conclusion is factually incorrect. The committee they cite has fewer stakeholders than the original working groups that delivered the Vandal Hybrid model. That team included faculty, staff, students’, and Alumni. It also included subject matter experts from the community and industry as well. Furthermore, the university held many town halls and solicited feedback from the entire university community. Please refer to 1.B.1 of this report to see the extent of the inclusiveness of the Vandal Hybrid Model or visit: [here](#) to view the Sustainable Financial Model Working Group ‘white paper’.

### PRFR 2.F.2.

#### Recommendation:

*Fix the broken webpage link (404) and develop a new set of Employee Development and Learning Goals.*

#### Response:

Employee Development and Learning’s reporting line changed from Human Resources to the Office of General Counsel in July 2020. Please see the updates to mission/objectives and 2021 annual goals at the site.

#### Goals:

University of Idaho Employee Development and Learning provides quality, accessible employee learning opportunities in support of UI’s Strategic Plan.

#### Core Objectives:

1. Collaborate with subject matter experts across the University in support of employee learning and development.
2. Serve as the UI’s central employee training resource in an effort to provide ease of access for learners, supervisors and instructors.
3. Oversee the design and coordination of UI training and development opportunities that support personal and professional growth.

#### 2021 Unit Goals:

1. Review and re-calibration of UI Compliance Training Initiative
2. Development of generalized training deployment strategy

3. Review and re-calibration of EDL Training Partners
4. Review and updated Supervisory Excellence Program

The broken links were verified by Information Technology Services (ITS) as users receiving 404 pages due to their browser settings. The following links have been fixed and verified:

- <https://www.uidaho.edu/governance/policy/policies/fsh/3/3180> - Employee Professional Development and Learning
- <https://www.uidaho.edu/governance/policy/policies/fsh/3/3185> - Employee Work-Related Education
- <https://www.uidaho.edu/governance/policy/policies/fsh/3/3710> - Leave Policies for All Employees
- <https://www.uidaho.edu/governance/policy/policies/fsh/3/3740> - Employee Educational Assistance
- <https://www.uidaho.edu/governance/policy/policies/fsh/3/3720> - Sabbatical Leave
- <https://www.uidaho.edu/governance/edl> - Employee Development & Learning

#### PRFR 2.G.5.

##### Recommendation:

Provide clarity of the BEAMS program's scope and an updated Default Rate posted to the website.

##### Response:

##### Scope of Program:

The following are the UI groups that REQUIRE BEAMS participation. However, there are several other internal constituencies that BEAMS works with to provide both workshops and private counseling.

- SSS-Trio
  - REQUIRED – BEAMS workshops
  - REQUIRED - First year Trio students
  - REQUIRED - Students getting SSS-Trio scholarships
  - HIGHLY RECOMMENDED – Sophomore & Junior students
  - HIGHLY RECOMMENDED – Senior Trio students
    - Post-graduation counseling
    - Student loan repayment options and duties
    - Misc.
- BRIDGE Doctoral candidates
  - REQUIRED – BEAMS workshops
  - HIGHLY RECOMMENDED – Private coaching sessions
- Doctoral candidates receiving stipends/GA's
  - REQUIRED – BEAMS workshops
  - HIGHLY RECOMMENDED – Private coaching sessions

<https://www.uidaho.edu/financial-aid/beams> - BEAMS Program

<https://www.uidaho.edu/financial-aid/beams/america-saves> - BEAMS Genesis

**Name:** UNIVERSITY OF IDAHO  
**Code:** 00162600 **Type:** School  
**Status:** OPEN  
**Address:** 709 DEAKIN AVENUE ROOM 101 STUDEN  
 MOSCOW, ID 838444291

### Cohort Default Rate History List

Fiscal Year	Rate Type	Numerator	Denominator	Rate	Process Date
2018	3YR DRAFT	86	2063	4.1	01/30/2021
2017	3YR OFFICIAL	126	2342	5.3	08/08/2020
	3YR DRAFT	125	2341	5.3	01/25/2020
2016	3YR OFFICIAL	140	2357	5.9	08/03/2019
	3YR DRAFT	141	2358	5.9	01/26/2019
2015	3YR OFFICIAL	144	2526	5.7	08/18/2018
	3YR DRAFT	144	2527	5.6	01/27/2018
2014	3YR OFFICIAL	167	2797	5.9	08/05/2017
	3YR DRAFT	167	2796	5.9	01/28/2017
2013	3YR OFFICIAL	184	2757	6.6	08/06/2016
	3YR DRAFT	185	2755	6.7	01/23/2016
2012	3YR OFFICIAL	172	2659	6.4	08/08/2015
	3YR DRAFT	175	2658	6.5	01/24/2015
2011	2YR OFFICIAL	156	2292	6.8	07/27/2013
	2YR DRAFT	158	2293	6.8	02/23/2013
	3YR OFFICIAL	191	2297	8.3	07/26/2014
	3YR DRAFT	191	2296	8.3	01/11/2014
2010	2YR OFFICIAL	98	2172	4.5	08/04/2012
	2YR DRAFT	104	2172	4.7	02/11/2012
	3YR OFFICIAL	163	2161	7.5	07/28/2013
	3YR DRAFT	160	2162	7.4	02/24/2013
2009	2YR OFFICIAL	72	2170	3.3	07/30/2011
	2YR DRAFT	86	2550	3.3	01/16/2011
	3YR OFFICIAL	112	2171	5.1	08/05/2012
	3YR DRAFT	132	2170	6	02/12/2012
2008	2YR OFFICIAL	94	3246	2.8	07/31/2010
	2YR DRAFT	104	3247	3.2	01/02/2010
	3YR TRIAL	N/A	N/A	N/A	04/14/2011

See **Appendix U** for official letter.

### **PRFR 2.G.7.**

#### **Recommendation:**

*Provide clarity (evidence) on how ITS authenticates student ID's is in order (as a secure document.)*

#### **Response:**

Distance education students access to all university systems is verified through the use of their NetID (username and password) combined with multi-factor authentication through our implementation of Duo. Both elements are required in order to access the BBLearn learning management system, Microsoft Office 365 email, the VandalWeb portal to the Banner student information systems and a number of other systems used for academic and administrative purposes.

When distance students require technology assistance and utilize the support portal, they are asked to use the same NetID and Duo combination or are asked to reset their password through a self-service password reset process. For those requesting assistance in person, via phone or via video, customer support representatives are trained to verify identification in the following ways (below is an exert from our internal knowledge base system):

#### **Verification in Person**

Verification in person requires Photo ID

Acceptable forms of Photo ID Include

- Passports
- VandalCards
- State or Government Issued ID

The following is NOT Acceptable

- Non State/Government issued ID
- Other Universities ID cards

#### **Phone Verification**

Must verify **3 of the following**. Asked in this order.

- Email Address
- Phone Number
- Mailing Address
- VNumber
- Last time a password was set
- Have they ever been employed by the University of Idaho?
  - What Position?
  - When?
- Have they ever been enrolled (get either starting, ending, or most recent semester)

**PLEASE NOTE:** If the customer has access to Banner (staff only) we must see photo ID. Cannot get 3? Speak with your supervisor for additional points of verification.

### **Video Verification**

Check photo ID over a video call. We must see both the customer and their ID in the video.

### **PRFR, Other Comment**

#### **Recommendation:**

*“Better use of narrative throughout the document could be helpful”.*

#### **Response:**

As a ‘team document’ there were many ‘writing voices’ and while it did not seem hard to read in the institution’s view, this Evaluation of Institutional Effectiveness (EIE) report used team information through a unified writing voice to correct this perception. The next PRFR should have a final voice ‘layered on’ during the proofing process.