

**CONSENT  
APRIL 25, 2023**

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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
1	<b>BAHR – FY 2024 - APPROPRIATIONS</b>	Action Item
2	<b>BAHR – FY 2024 OPPORTUNITY SCHOLARSHIP – EDUCATIONAL COSTS</b>	Action Item
3	<b>BAHR – BOISE STATE UNIVERSITY – STUDENT HEALTH INSURANCE PROGRAM (SHIP) CONTRACT</b>	Action Item
4	<b>BAHR – BOISE STATE UNIVERSITY – MICRON CENTER FOR MATERIALS RESEARCH – METAL-ORGANIC CHEMICAL VAPOR DISPOSITION PROJECT CONSTRUCTION AND FINANCING</b>	Action Item
5	<b>BAHR – BOISE STATE UNIVERSITY – STUDENT UNION BUILDING – SWITCHGEAR REPLACEMENT PROJECT</b>	Action Item
6	<b>BAHR - BOISE STATE UNIVERSITY – EFY, LLC SUMMER CAMP AGREEMENT</b>	Action Item
7	<b>BAHR - BOISE STATE UNIVERSITY – SIX (6) YEAR CAPITAL CONSTRUCTION PLAN AMENDMENT</b>	Action Item
8	<b>BAHR – UNIVERSITY OF IDAHO – FACULTY MULTI-YEAR LAW CONTRACTS</b>	Action Item
9	<b>IRSA – BOISE STATE UNIVERSITY – ONLINE BACHELOR OF PROJECT MANAGEMENT</b>	Action Item

**CONSENT  
APRIL 25, 2023**

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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
10	IRSA – BOISE STATE UNIVERSITY – PHD IN PUBLIC AND POPULATION HEALTH LEADERSHIP	Action Item
11	PPGA – DATA MANAGEMENT COUNCIL APPOINTMENTS	Action Item
12	PPGA – INDIAN EDUCATION COMMITTEE APPOINTMENTS	Action Item
13	SDE – EMERGENCY PROVISIONAL CERTIFICATES	Action Item
14	SDE – SAFETY BUSING REQUEST – APPROVAL TO TRANSPORT STUDENTS LESS THAN 1 ½ MILES	Action Item
15	SDE – PRAXIS II ASSESSMENTS AND QUALIFYING SCORES	Action Item
16	SDE – PROFESSIONAL STANDARDS COMMISSION APPOINTMENTS	Action Item

**BOARD ACTION**

I move to approve the consent agenda.

**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**SUBJECT**

FY 2024 Appropriation Information – Institutions and Agencies of the State Board of Education

**APPLICABLE STATUTE, RULE, OR POLICY**

Applicable Legislative Appropriation Bills (2023)

**BACKGROUND/ DISCUSSION**

As of agenda preparation time, the appropriation bills for the institutions and agencies of the State Board of Education were in various stages. Bill numbers are provided if available.

The table on Tab 1 Attachment 1 lists the FY 2024 appropriations related to the State Board of Education.

**IMPACT**

Appropriations provide funding and spending authority for the agencies and institutions of the State Board of Education, allowing them to offer programs and services to Idaho's citizens.

**ATTACHMENTS**

Attachment 1 – FY 2024 Appropriations List

**STAFF COMMENTS**

Staff comments and recommendations are included for each specific institution and agency allocation.

**BOARD ACTION**

Motions for the allocations for College and Universities, Community Colleges, and Career Technical Education are found on each specific institution and agency allocation.

**BUSINESS AFFAIRS AND HUMAN RESOURCES  
APRIL 25, 2023**

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**ATTACHMENT 1**

**State Board of Education  
FY 2024 Appropriations to Institutions and Agencies**

	<b>General Fund</b>	<b>% Δ From FY 2023</b>	<b>Total Funds</b>
<b><u>Allocations</u></b>			
College and Universities S1176	\$353,942,200	4.7%	\$678,550,500
Community Colleges S1160	60,910,500	7.0%	61,710,500
Career Technical Education H363	76,509,300	4.5%	103,296,800
<b><u>Agencies</u></b>			
Agricultural Research & Extension H336	36,798,300	4.0%	37,188,400
Health Education Programs S1147	26,845,500	8.1%	27,215,100
Special Programs S1177	29,138,000	5.5%	34,885,600
State Board of Education S1202	41,353,500	338.6%	96,376,200
Idaho Public Television H276	2,933,900	4.1%	2,93,900
Division of Vocational Rehabilitation H300	5,172,200	3.8%	26,541,800
Idaho Public Charter Schools H275	190,100	4.2%	825,700
State Department of Education H353	14,778,500	4.4%	45,800,500

**Statewide Issues**

Permanent Building Fund Advisory Committee Appropriations S1197:

As of agenda preparation time, the total for A&R projects for the institutions and agencies was \$31,405,500 and the estimated FY 2023 supplemental for deferred maintenance was \$174,000,000. The following capital requests were recommended:

Boise State University	17,936,000
Idaho State University	8,388,000
University of Idaho State	8,998,000
Lewis-Clark State College	2,370,000
College of Western Idaho: Student Learning Center	10,700,000
College of Western Idaho: Ag. Science/Horticulture Expansion - Phase 2	5,000,000
College of Southern Idaho: Emergency Generator and Data Center	2,530,000
College of Southern Idaho: Evergreen Building	9,000,000
College of Eastern Idaho: Campus Infrastructure Improvements	8,000,000



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**SUBJECT**

FY 2024 College and Universities Appropriation Allocation

**APPLICABLE STATUTE, RULE, OR POLICY**

Senate Bill 1176 (2023)

Idaho State Board of Education Governing Policies & Procedures, Section V.S.

**BACKGROUND/DISCUSSION**

The Legislature appropriates to the State Board of Education and the Board of Regents monies for the general education programs at Boise State University (BSU), Idaho State University (ISU), University of Idaho (UI), Lewis-Clark State College (LCSC), and system-wide needs. The Board allocates the appropriation to the four institutions based on legislative intent and Board Policy, Section V.S.

According to Board policy, the allocation is made in the following order: 1) each institution shall be allocated its prior year budget base; 2) funds for the Enrollment Workload Adjustment (EWA); 3) operations and maintenance funds for new, major general education capital improvement projects; 4) decision units above the base; and 5) special activities or projects at the discretion of the Board. These funds, allocated along with revenue generated from potential fee increases, will establish the funding for the general education programs for FY 2024. The allocation for FY 2024 is shown on Tab 1a Attachment 1. The FY 2024 general fund appropriation includes the following items:

Maintenance of Current Operations (MCO):

• Increases in benefit costs	\$3,332,500
• Statewide cost allocation	2,582,200
• \$1.20 per hour Merit (CEC)	8,923,400
• Enrollment Workload Adjustment (EWA)	(2,963,100)

Line Items:

• Audit Staff Transfer to OSBE	(1,203,900)
• Governor's Initiative – Institution Funding	5,937,200
• Division of Human Resources Consolidation	63,500
• Systemwide Needs: Academic Technology Support Staff	103,000
• Systemwide Needs: Apply Idaho Project Manager	<u>96,100</u>

Total General Fund increase over Base \$16,870,900

**ATTACHMENTS**

Attachment 1 - C&U FY 2024 Appropriation Allocation

Attachment 2 - Statement of Purpose/Fiscal Note

Attachment 3 - Appropriation Bill (S1176)

**STAFF COMMENTS**

Staff recommends approval of the FY 2024 College and Universities allocation as presented in Attachment 1.

**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**BOARD ACTION**

I move to approve the allocation of the FY 2024 appropriation for Boise State University, Idaho State University, University of Idaho, Lewis-Clark State College, and system-wide needs, as presented on Tab 1a, Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

FY 2024 College and University Allocation  
Based on SB 1176

March 24, 2023

1	<b>Appropriation:</b>	<b>FY23 Appr</b>	<b>FY24 Appr</b>	<b>% Chge</b>	<b>Sys Needs:</b>	<b>FY23 Appr</b>	<b>FY24 Appr</b>
2	<b>General Educ Approp: SB 1176</b>				HERC	1,962,700	1,962,700
3	General Account	340,515,500	353,942,200	3.94%	UG Research	200,000	200,000
4	Endowment Funds	19,632,800	22,918,100	16.73%	Sys Nds	2,252,600	2,252,600
5					IGEM	2,000,000	2,000,000
6	Total Gen Acct & Endow Funds	360,148,300	376,860,300	4.64%	Total	6,415,300	6,415,300
7	Student Fees/Misc Revenue	480,192,900	301,690,600	-37.17%			
8	One-time CARES Act and HESF Funding	6,232,700	0				
9	Total General Education Appropriation	846,573,900	678,550,900	-19.85%			
10							
11							
12	<b>Allocation:</b>	<b>BSU</b>	<b>ISU</b>	<b>UI</b>	<b>LCSC</b>	<b>SYS-WIDE</b>	<b>TOTAL</b>
13	FY23 General Account	120,502,400	90,068,200	99,868,100	20,389,900	6,242,700	337,071,300
14	FY23 Endowment Funds	0	5,153,200	14,480,100	3,284,400	0	22,917,700
15	<b>FY24 Budget Base</b>	<b>120,502,400</b>	<b>95,221,400</b>	<b>114,348,200</b>	<b>23,674,300</b>	<b>6,242,700</b>	<b>359,989,000</b>
16							
17							
18	<b>Additional Funding for FY24:</b>						
19	MCO Adjustments:						
20	Personnel Benefits	1,071,200	1,041,500	965,100	254,700		3,332,500
21	Inflation including Library B&P	0	0	0	0	0	0
22	Recplacement Capital	0	0	0	0	0	0
23	CEC: \$1.20 per hour merit	2,960,800	2,792,200	2,577,400	593,000		8,923,400
24	Compensation Schedule Changes	0	0	0	0		0
25	Endowment Fund Adjustments	0	0	0	0		0
26	Nonstandard Adjustments:						
27	Risk Mgmt/Controller/Treasurer	1,003,700	661,900	844,800	71,800		2,582,200
28	External Nonstandard Adjustments:						
29	Enrollment Workload Adjustment (EWA) - GF	(2,020,300)	(841,000)	(177,300)	75,500		(2,963,100)
30	Line Items						
31	Audit Staff Transfer	(423,200)	(390,600)	(390,100)	0	0	(1,203,900)
32	Governor's Initiative - Institution Funding	2,136,600	1,614,000	1,816,500	370,100	0	5,937,200
33	DHR Consolidation - General Funds	23,700	34,300	0	5,500	0	63,500
34	DHR Consolidation - Student Fees	23,100	12,000	0	4,100	0	39,200
35	Academic Technology Support Staff	0	0	0	0	103,000	103,000
36	Apply Idaho Project Manager	0	0	0	0	96,100	96,100
37	HERC Coordinator GF ongoing	0	0	0	0	(3,000)	(3,000)
38	HERC Coordinator GF one-time	0	0	0	0	3,000	3,000
39	Total Addl Funding	4,775,600	4,924,300	5,636,400	1,374,700	199,100	16,910,100
40							
41	<b>FY24 Gen Acct, Endow, CARES and HESF</b>	<b>125,254,900</b>	<b>100,133,700</b>	<b>119,984,600</b>	<b>25,044,900</b>	<b>6,441,800</b>	<b>376,859,900</b>
42	% Change From FY23 Adjusted Budget Base	3.94%	5.16%	4.93%	5.79%	3.19%	4.69%
43							
44	FY24 Estimated Student Fee Revenue	157,286,900	59,351,000	69,580,500	15,472,200	0	301,690,600
45							
46	FY24 Operating Budget	282,541,800	159,484,700	189,565,100	40,517,100	6,441,800	678,550,500
47		0					
48							
49	General Fund Increase over Base	4,752,500	4,912,300	5,636,400	1,370,600	199,100	16,870,900
50	% Increase	3.9%	5.5%	5.6%	6.7%	3.2%	5.0%
51	General Fund Increase - ongoing over Base	4,752,500	4,912,300	5,636,400	1,370,600	196,100	16,867,900
52	% Increase	3.9%	5.5%	5.6%	6.7%	3.1%	5.0%
53	General Fund Increase - ongoing less Benefits & CEC	720,500	1,078,600	2,093,900	522,900	196,100	4,612,000
54	% Increase	0.6%	1.2%	2.1%	2.6%	3.1%	1.4%

## STATEMENT OF PURPOSE

RS30648 / S1176

This is the FY 2024 original appropriation bill for the College and Universities. It appropriates a total of \$678,550,500. Included in this bill is \$4,369,900 in inflationary adjustments from dedicated funds for utility costs, communication costs, repair and maintenance services, travel costs, computer supplies, insurance, and other items including \$2,310,700 for Boise State University (BSU), \$1,941,900 for Idaho State University (ISU), and \$117,300 for the University of Idaho (UI). Also included in this bill is \$2,224,600 from dedicated funds for replacement items at Boise State University including vehicles, lab equipment, floor care, audio/visual and computer equipment, tools, lawn equipment, and other items, and \$102,700 for human resources consolidation at BSU, ISU, and Lewis-Clark State College (LCSC). For the Enrollment Workload Adjustment (EWA), BSU received a reduction of \$2,020,300, ISU received a reduction of \$841,000, LCSC received an increase of \$75,500, and UI received a reduction of \$177,300. The bill also funds six line items. Line item 1 provides 0.50 FTP for a Higher Education Research Council Staff position, who would monitor and verify the allocation of the money distributed to the institutions for research and economic development. Line item 2 provides 1.00 FTP and \$103,000 for academic technology support staff, who would support the faculty and staff at the institutions who utilize online education resources. Line item 3 provides 1.00 FTP and \$96,100 for an Apply Idaho project manager, which would expand the application period to year-round and the applicant pool to any Idaho high school graduate. Line item 4 is a reduction of 10.00 FTP and a reduction of \$1,203,900 to transfer internal audit staff from the institutions to the Office of the State Board of Education. Line item 5 is a reduction of \$55,200 in operating expenditures, an increase of \$52,200 in personal costs, and an increase of \$3,000 in capital outlay from the General Fund for the HERC staff position in line item 1. Lastly, the bill provides a total of \$5,937,200 for discretionary funding at each of the four institutions with \$2,136,600 allocated to BSU, \$1,614,000 to ISU, \$370,100 to LCSC, and \$1,816,500 to UI.

## FISCAL NOTE

	FTP	Gen	Ded	Fed	Total
FY 2023 Original Appropriation	4,749.43	338,065,500	304,968,000	14,000	643,047,500
Prior Year Reappropriation	0.00	1,450,000	198,143,000	6,218,700	205,811,700
1. Security Incident Costs	0.00	1,000,000	0	0	1,000,000
FY 2023 Total Appropriation	4,749.43	340,515,500	503,111,000	6,232,700	849,859,200
Executive Carry Forward	0.00	34,900	0	0	34,900
Expenditure Adjustments	24.82	0	6,932,400	0	6,932,400
FY 2023 Estimated Expenditures	4,774.25	340,550,400	510,043,400	6,232,700	856,826,500
Removal of Onetime Expenditures	(30.33)	(3,479,100)	(205,500,300)	(6,232,700)	(215,212,100)
Base Adjustments	104.26	0	5,500,400	0	5,500,400
FY 2024 Base	4,848.18	337,071,300	310,043,500	0	647,114,800
Personnel Benefit Costs	0.00	3,332,500	2,151,700	0	5,484,200
Inflationary Adjustments	0.00	0	4,369,900	0	4,369,900

**DISCLAIMER:** This statement of purpose and fiscal note are a mere attachment to this bill and prepared by a proponent of the bill. It is neither intended as an expression of legislative intent nor intended for any use outside of the legislative process, including judicial review (Joint Rule 18).

**ATTACHMENT 2**

Replacement Items	0.00	0	2,224,600	0	2,224,600
Statewide Cost Allocation	0.00	2,582,200	0	0	2,582,200
Change in Employee Compensation	0.00	8,923,400	5,779,400	0	14,702,800
Nondiscretionary Adjustments	0.00	(2,963,100)	0	0	(2,963,100)
<b>FY 2024 Program Maintenance</b>	<b>4,848.18</b>	<b>348,946,300</b>	<b>324,569,100</b>	<b>0</b>	<b>673,515,400</b>
DHR Consolidation	0.00	63,500	39,200	0	102,700
1. Higher Ed. Research Council Staff	0.50	0	0	0	0
2. Academic Technology Support Staff	1.00	103,000	0	0	103,000
3. Apply Idaho Project Manager	1.00	96,100	0	0	96,100
5. BSU, ISU, UI - Audit Staff					
Transfer	(10.00)	(1,203,900)	0	0	(1,203,900)
HERC Coordinator Funding	0.00	0	0	0	0
Gov. Initiative - Institution Funding	0.00	5,937,200	0	0	5,937,200
Budget Law Exemptions/Other Adjustments	0.00	0	0	0	0
<b>FY 2024 Total</b>	<b>4,840.68</b>	<b>353,942,200</b>	<b>324,608,300</b>	<b>0</b>	<b>678,550,500</b>
Chg from FY 2023 Orig Approp	91.25	15,876,700	19,640,300	(14,000)	35,503,000
% Chg from FY 2023 Orig Approp.	1.9%	4.7%	6.4%	(100.0%)	5.5%

**Contact:**

Senator Dave Lent  
 (208) 332-1313  
 Representative James Petzke  
 (208) 332-1043

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LEGISLATURE OF THE STATE OF IDAHO  
 Sixty-seventh Legislature First Regular Session - 2023

IN THE SENATE

SENATE BILL NO. 1176

BY FINANCE COMMITTEE

AN ACT

RELATING TO THE APPROPRIATION TO THE STATE BOARD OF EDUCATION AND THE BOARD OF REGENTS OF THE UNIVERSITY OF IDAHO; APPROPRIATING MONEYS TO THE STATE BOARD OF EDUCATION AND THE BOARD OF REGENTS OF THE UNIVERSITY OF IDAHO FOR COLLEGE AND UNIVERSITIES AND THE OFFICE OF THE STATE BOARD OF EDUCATION FOR FISCAL YEAR 2024; PROVIDING REAPPROPRIATION AUTHORITY; EXEMPTING THE APPROPRIATION FROM OBJECT AND PROGRAM TRANSFER LIMITATIONS; PROVIDING REQUIREMENTS FOR SYSTEMWIDE NEEDS; DIRECTING AN ADJUSTMENT FOR STUDENT TUITION AND FEES FOR FISCAL YEAR 2024; PROVIDING FOR THE USE OF APPROPRIATED FUNDS; AND DECLARING AN EMERGENCY AND PROVIDING AN EFFECTIVE DATE.

Be It Enacted by the Legislature of the State of Idaho:

SECTION 1. There is hereby appropriated to the State Board of Education and the Board of Regents of the University of Idaho for College and Universities and the Office of the State Board of Education the following amounts to be expended according to the designated programs and expense classes from the listed funds for the period July 1, 2023, through June 30, 2024:

	FOR	FOR	FOR	FOR	
	PERSONNEL	OPERATING	CAPITAL	TRUSTEE AND	
	COSTS	EXPENDITURES	OUTLAY	BENEFIT	TOTAL
				PAYMENTS	
I. BOISE STATE UNIVERSITY:					
FROM:					
General					
Fund	\$112,276,400	\$9,220,700	\$3,757,800		\$125,254,900
Unrestricted					
Fund	<u>109,846,500</u>	<u>45,078,400</u>	<u>2,362,000</u>		<u>157,286,900</u>
TOTAL	\$222,122,900	\$54,299,100	\$6,119,800		\$282,541,800
II. IDAHO STATE UNIVERSITY:					
FROM:					
General					
Fund	\$92,742,500	\$2,238,000			\$94,980,500
Charitable Institutions Endowment Income					
Fund	1,868,800				1,868,800
Normal School Endowment Income					
Fund	3,284,400				3,284,400

	FOR	FOR	FOR	FOR	
	PERSONNEL	OPERATING	CAPITAL	TRUSTEE AND	
	COSTS	EXPENDITURES	OUTLAY	BENEFIT	TOTAL
				PAYMENTS	
5	Unrestricted				
6	Fund	<u>32,403,400</u>	<u>23,280,900</u>	<u>\$3,666,700</u>	<u>59,351,000</u>
7	TOTAL	\$130,299,100	\$25,518,900	\$3,666,700	\$159,484,700
8	III. LEWIS-CLARK STATE COLLEGE:				
9	FROM:				
10	General				
11	Fund	\$18,912,900	\$2,422,300	\$425,300	\$21,760,500
12	Normal School Endowment Income				
13	Fund		3,284,400		3,284,400
14	Unrestricted				
15	Fund	<u>14,046,200</u>	<u>1,402,200</u>	<u>23,800</u>	<u>15,472,200</u>
16	TOTAL	\$32,959,100	\$7,108,900	\$449,100	\$40,517,100
17	IV. UNIVERSITY OF IDAHO:				
18	FROM:				
19	General				
20	Fund	\$95,764,700	\$6,248,300	\$3,491,500	\$105,504,500
21	Agricultural College Endowment Income				
22	Fund	940,100	740,500	246,900	1,927,500
23	Scientific School Endowment Income				
24	Fund	3,468,500	3,204,200		6,672,700
25	University Endowment Income				
26	Fund		5,199,300	680,600	5,879,900
27	Unrestricted				
28	Fund	<u>53,400,900</u>	<u>16,179,600</u>	<u>0</u>	<u>69,580,500</u>
29	TOTAL	\$153,574,200	\$31,571,900	\$4,419,000	\$189,565,100
30	V. SYSTEMWIDE PROGRAMS:				
31	FROM:				
32	General				
33	Fund	\$251,300	\$2,112,700	\$3,000	\$4,074,800
34	GRAND TOTAL	\$539,206,600	\$120,611,500	\$14,657,600	\$678,550,500

35 SECTION 2. REAPPROPRIATION AUTHORITY. There is hereby reappropriated  
36 to the State Board of Education and the Board of Regents of the University of

1 Idaho for College and Universities and the Office of the State Board of Edu-  
2 cation any unexpended and unencumbered balances appropriated or reappropri-  
3 ated to the State Board of Education and the Board of Regents of the Univer-  
4 sity of Idaho for College and Universities and the Office of the State Board  
5 of Education from dedicated funds for fiscal year 2023 to be used for nonre-  
6 curring expenditures for the period July 1, 2023, through June 30, 2024. The  
7 Office of the State Controller shall confirm the reappropriation amount, by  
8 fund, expense class, and program, with the Legislative Services Office prior  
9 to processing the reappropriation authorized herein.

10 SECTION 3. EXEMPTIONS FROM OBJECT AND PROGRAM TRANSFER LIMITATIONS.  
11 The State Board of Education and the Board of Regents of the University of  
12 Idaho for College and Universities and the Office of the State Board of Edu-  
13 cation are hereby exempted from the provisions of Section 67-3511(1), (2),  
14 and (3), Idaho Code, allowing unlimited transfers between object codes and  
15 between programs for all moneys appropriated to them for the period July  
16 1, 2023, through June 30, 2024. Legislative appropriations shall not be  
17 transferred from one fund to another fund unless expressly approved by the  
18 Legislature.

19 SECTION 4. SYSTEMWIDE NEEDS. Of the amount appropriated in Section 1,  
20 Subsection V. of this act, the following amounts may be used as follows: (1)  
21 an amount not to exceed \$902,600 may be used by the Office of the State Board  
22 of Education for systemwide needs that benefit all of the four-year insti-  
23 tutions, including but not limited to projects to promote accountability  
24 and information transfer throughout the higher education system; and (2)  
25 an amount of approximately \$1,960,500 may be used for the mission and goals  
26 of the Higher Education Research Council as outlined in State Board of Ed-  
27 ucation Policy III.W., which includes awards for infrastructure, matching  
28 grants, and competitive grants through the Idaho Incubation Fund program.

29 SECTION 5. STUDENT TUITION AND FEES FOR FISCAL YEAR 2024. Notwith-  
30 standing the provisions of Section 67-3516(2), Idaho Code, the Division of  
31 Financial Management may approve the expenditure of dedicated state funds  
32 pursuant to the noncognizable process for student tuition and fees during  
33 fiscal year 2024. Each of the institutions' budget requests for fiscal year  
34 2025 shall reflect all adjustments so approved by the Division of Financial  
35 Management.

36 SECTION 6. USE OF APPROPRIATED FUNDS. The college and universities  
37 shall verify no state appropriated funds are used to support diversity,  
38 equity, inclusion, or social justice ideology as part of any student ac-  
39 tivities, clubs, events, or organizations on campus. Each college and  
40 university shall submit a written report of its expenditures related to  
41 these activities to the Joint Finance-Appropriations Committee no later  
42 than January 14, 2024.

43 SECTION 7. An emergency existing therefor, which emergency is hereby  
44 declared to exist, this act shall be in full force and effect on and after  
45 July 1, 2023.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**SUBJECT**

Community Colleges FY 2024 Appropriation Allocation

**APPLICABLE STATUTE, RULE, OR POLICY**

Senate Bill 1160 (2023)

**BACKGROUND/DISCUSSION**

The Legislature makes an annual appropriation to the State Board of Education for College of Eastern Idaho (CEI), College of Southern Idaho (CSI), College of Western Idaho (CWI) and North Idaho College (NIC). The allocation to the colleges includes the base allocation plus each college's respective share in any annual budget adjustments according to the normal budgeting process.

**IMPACT**

The FY 2024 appropriation, shown on Tab 1b Attachment 1, includes General Fund increases in benefit costs, \$1.20 per hour ongoing Change in Employee Compensation (CEC) for all employees based on merit, and increases or decreases in Enrollment Workload Adjustment. Line items include the following:

CSI and CEI: Compensation Equalization	\$343,200
Additional CEC for all community colleges	454,300
CWI: Increased Nursing Capacity	303,700
CWI: STEM Student Capacity Increase	447,300
CWI: Student Outreach and Recruitment	294,800

**ATTACHMENTS**

- Attachment 1 – FY 2024 CC Appropriations Allocation
- Attachment 2 – Statement of Purpose/Fiscal Note
- Attachment 3 – Appropriation Bill (S1160)

**STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends approval of the FY 2024 Community College allocation.

**BOARD ACTION**

I move to approve the allocation of the FY 2024 appropriation for the College of Southern Idaho, College of Eastern Idaho, College of Western Idaho, North Idaho College, and system-wide needs as presented on Tab 1b, Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

Idaho Community Colleges  
 FY 2024 Appropriation Allocation - SB 1160  
 10-Mar-23

General Educ Approp: JFAC Action

	CSI	CEI	CWI	NIC	Systemwide	Total
1 FY 23 Total Appropriation						
2 General Funds	17,146,200	6,082,400	19,095,000	14,566,100	1,039,200	57,928,900
3 CARES Act Funding		6,000	8,000			14,000
4 Dedicated Funds	200,000	200,000	200,000	200,000		800,000
5 Total FY23 Total Appropriation	17,346,200	6,288,400	19,303,000	14,766,100	1,039,200	58,742,900
6						
7 FY 24 Base						-
8 General Funds	17,146,200	6,082,400	19,095,000	14,566,100	39,200	56,928,900
9 Dedicated Funds	200,000	200,000	200,000	200,000		800,000
10 Total FY 24 Base	17,346,200	6,282,400	19,295,000	14,766,100	39,200	57,728,900
11						-
12 FY 24 Maintenance Items						
13 Changes in Benefit Costs	143,000	47,800	155,400	117,100		463,300
14 Inflationary Cost Increases	-	-	-	-		-
15 Replacement Items	-	-	-	-		-
16 CEC: \$1.20 per hour merit	441,200	209,700	549,700	423,300		1,623,900
17 Enrollment Workload Adjustment	353,700	322,900	(383,000)	(242,500)		51,100
18	937,900	580,400	322,100	297,900	-	2,138,300
19 FY 24 Maintenance						-
20 General Funds	18,084,100	6,662,800	19,417,100	14,864,000	39,200	59,067,200
21 Dedicated Funds	200,000	200,000	200,000	200,000	-	800,000
22 Total FY 24 Maintenance	18,284,100	6,862,800	19,617,100	15,064,000	39,200	59,867,200
23						
24 FY 24 Line Items						
25 Compensation Equalization	261,000	82,200				343,200
26 Additional CEC for Institutions	123,400	58,700	153,800	118,400		454,300
27 CWI - Increased Nursing Capacity			303,700			303,700
28 CWI - STEM Student Capacity Increase			447,300			447,300
29 CWI - Student Outreach and Recruitment			294,800			294,800
30 Total FY 24 Line Items	384,400	140,900	1,199,600	118,400	0	1,843,300
31						
32 FY 24 Total Appropriation						
33 General Funds	18,468,500	6,803,700	20,616,700	14,982,400	39,200	60,910,500
34 CARES Act Funding						-
35 Dedicated Funds	200,000	200,000	200,000	200,000	-	800,000
36 FY 24 Total Appropriation	18,668,500	7,003,700	20,816,700	15,182,400	39,200	61,710,500
37						
38						
39 GF Change from FY 23 Total	7.7%	11.9%	8.0%	2.9%	0.0%	5.1%
40						
41 GF Appropriation Allocation						
42 Personnel Costs	16,157,600	6,803,700	17,158,200	12,815,600		52,935,100
43 Operating Expenses	2,310,900		3,442,500	2,166,800	39,200	7,959,400
44 Capital Outlay			16,000			16,000
45 Trustee/Benefit Payments						0
46 Total General Funds	18,468,500	6,803,700	20,616,700	14,982,400	39,200	60,910,500

## STATEMENT OF PURPOSE

RS30599 / S1160

This is the FY 2024 original appropriation bill for the Community Colleges. It appropriates a total of \$61,710,500. The bill provides for a net increase of \$51,100 for the enrollment workload adjustment (EWA). The College of Western Idaho was held harmless for 50%, or \$383,000 of their calculated EWA decrease for the purpose of standing up a new entrepreneurial program at the college. The bill also funds six line items, which provide \$82,200 for compensation equalization at the College of Eastern Idaho, \$261,000 for compensation equalization at the College of Southern Idaho, \$303,700 for increased nursing capacity at the College of Western Idaho (CWI), \$447,300 for increased STEM student capacity at CWI, \$294,800 for student outreach and recruitment at CWI, and \$454,300 for an additional CEC at all four institutions.

## FISCAL NOTE

	FTP	Gen	Ded	Fed	Total
FY 2023 Original Appropriation	0.00	56,928,900	800,000	14,000	57,742,900
Removal of Onetime Expenditures	0.00	0	0	(14,000)	(14,000)
Base Adjustments	0.00	0	0	0	0
FY 2024 Base	0.00	56,928,900	800,000	0	57,728,900
Personnel Benefit Costs	0.00	463,300	0	0	463,300
Change in Employee Compensation	0.00	1,623,900	0	0	1,623,900
Nondiscretionary Adjustments	0.00	51,100	0	0	51,100
FY 2024 Program Maintenance	0.00	59,067,200	800,000	0	59,867,200
1. CEI - Compensation Equalization	0.00	82,200	0	0	82,200
2. CSI - Compensation Equalization	0.00	261,000	0	0	261,000
3. CWI - Increased Nursing Capacity	0.00	303,700	0	0	303,700
4. CWI - STEM Student Capacity Increase	0.00	447,300	0	0	447,300
5. CWI - Student Outreach and Recruitment	0.00	294,800	0	0	294,800
9. Additional CEC for Institutions	0.00	454,300	0	0	454,300
FY 2024 Total	0.00	60,910,500	800,000	0	61,710,500
Chg from FY 2023 Orig Approp	0.00	3,981,600	0	(14,000)	3,967,600
% Chg from FY 2023 Orig Approp.		7.0%	0.0%	(100.0%)	6.9%

**Contact:**

Senator Dave Lent  
(208) 332-1313  
Representative Wendy Horman  
(208) 332-1071

**DISCLAIMER:** This statement of purpose and fiscal note are a mere attachment to this bill and prepared by a proponent of the bill. It is neither intended as an expression of legislative intent nor intended for any use outside of the legislative process, including judicial review (Joint Rule 18).

LEGISLATURE OF THE STATE OF IDAHO  
 Sixty-seventh Legislature First Regular Session - 2023

IN THE SENATE

SENATE BILL NO. 1160

BY FINANCE COMMITTEE

1 AN ACT  
 2 RELATING TO THE APPROPRIATION TO THE STATE BOARD OF EDUCATION FOR COMMUNITY  
 3 COLLEGES; APPROPRIATING MONEYS TO THE STATE BOARD OF EDUCATION FOR COM-  
 4 MUNITY COLLEGES FOR FISCAL YEAR 2024; EXEMPTING THE APPROPRIATION FROM  
 5 OBJECT AND PROGRAM TRANSFER LIMITATIONS; AND DECLARING AN EMERGENCY AND  
 6 PROVIDING AN EFFECTIVE DATE.

7 Be It Enacted by the Legislature of the State of Idaho:

8 SECTION 1. There is hereby appropriated to the State Board of Education  
 9 for Community Colleges the following amounts to be expended according to the  
 10 designated programs and expense classes from the listed funds for the period  
 11 July 1, 2023, through June 30, 2024:

	FOR	FOR	FOR	
	PERSONNEL	OPERATING	CAPITAL	
	COSTS	EXPENDITURES	OUTLAY	TOTAL
15 I. COLLEGE OF EASTERN IDAHO:				
16 FROM:				
17 General				
18 Fund	\$6,803,700			\$6,803,700
19 Community College				
20 Fund	<u>200,000</u>			<u>200,000</u>
21 TOTAL	\$7,003,700			\$7,003,700
22 II. COLLEGE OF SOUTHERN IDAHO:				
23 FROM:				
24 General				
25 Fund	\$16,157,600	\$2,310,900		\$18,468,500
26 Community College				
27 Fund	<u>0</u>	<u>200,000</u>		<u>200,000</u>
28 TOTAL	\$16,157,600	\$2,510,900		\$18,668,500
29 III. COLLEGE OF WESTERN IDAHO:				
30 FROM:				
31 General				
32 Fund	\$17,158,200	\$3,442,500	\$16,000	\$20,616,700

	FOR	FOR	FOR	
	PERSONNEL	OPERATING	CAPITAL	
	COSTS	EXPENDITURES	OUTLAY	TOTAL
1				
2				
3				
4	Community College			
5	Fund	<u>0</u>	<u>200,000</u>	<u>0</u>
6	TOTAL	\$17,158,200	\$3,642,500	\$16,000
				\$20,816,700
7	IV. NORTH IDAHO COLLEGE:			
8	FROM:			
9	General			
10	Fund	\$12,815,600	\$2,166,800	
11	Community College			\$14,982,400
12	Fund	<u>0</u>	<u>175,000</u>	<u>\$25,000</u>
13	TOTAL	\$12,815,600	\$2,341,800	\$25,000
				\$15,182,400
14	V. CC SYSTEMWIDE:			
15	FROM:			
16	General			
17	Fund		\$39,200	
				\$39,200
18	GRAND TOTAL	\$53,135,100	\$8,534,400	\$41,000
				\$61,710,500

19 SECTION 2. EXEMPTIONS FROM OBJECT AND PROGRAM TRANSFER LIMITATIONS.  
20 The State Board of Education for Community Colleges is hereby exempted from  
21 the provisions of Section 67-3511(1), (2), and (3), Idaho Code, allowing  
22 unlimited transfers between object codes and between programs for all moneys  
23 appropriated to it for the period July 1, 2023, through June 30, 2024. Leg-  
24 islative appropriations shall not be transferred from one fund to another  
25 fund unless expressly approved by the Legislature.

26 SECTION 3. An emergency existing therefor, which emergency is hereby  
27 declared to exist, this act shall be in full force and effect on and after  
28 July 1, 2023.

**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**SUBJECT**

Allocation of the Idaho Division of Career Technical Education FY 2024 appropriation

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-2202, Idaho Code  
House Bill 363 (2023) and House Bill 364 (2023)

**BACKGROUND/DISCUSSION**

Pursuant to Section 33-2202, Idaho Code, career technical education includes: all programs, secondary and postsecondary (starting in grade 7), adult courses, programs, training, and services administered by the Division of Career Technical Education for occupations or career that require other than a baccalaureate, master's, or doctoral degree. The Idaho Legislature appropriates funds for career technical education in Idaho to the Idaho Division of Career Technical Education (Division) in five budgeted programs: Central Staff, Secondary and General Programs, Postsecondary Programs, Educator Services Program, Related Programs (Adult Education, General Educational Development, Centers for New Directions, and Workforce Training Centers). The Division requests approval of the allocation of the FY 2024 appropriated funds detailed in Attachment 1.

The allocation is based on the FY 2024 original appropriation bill, HB 363 (2023) for the Division and trailer appropriation established in HB 364 (2023) for an additional \$5M for secondary and general programs from the In-Demand Career Fund to be expended for trustee and benefit payments. HB 363 appropriates a total of \$103,296,800. The bill funds seven line items, which provides 6.00 FTP and \$592,900 for additional career technical education personnel, 4.50 FTP and \$581,800 for postsecondary staff, \$131,700 for higher enrollment funding, 1.00 FTP and \$910,700 for an apprenticeship grant, realignment of funds between programs in conjunction with LUMA, \$434,800 for firefighter training equipment, \$15,000,000 for secondary and postsecondary career technical education program support, and \$39,500 for human resource consolidation. HB 363 (2023) increases the Divisions FTP by 1.9% with an increase of 10.50 FTP, a general fund increase of 4.5%, and federal fund increase of 7.1% for an overall increase of 22.6%.

**IMPACT**

Establish FY 2024 Idaho Division of Career Technical Education operating budget.

**ATTACHMENTS**

- Attachment 1 – FY 2024 Allocation of the Idaho Division of Career Technical Education
- Attachment 2 – HB 363 Statement of Purpose/ Fiscal Note
- Attachment 3 – HB 363 Appropriation
- Attachment 4 – HB 364 Statement of Purpose/ Fiscal Note
- Attachment 5 – HB 364 Appropriation

**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends approval of the allocation of the FY 2024 appropriation for the Division as detailed in Attachments 1.

**BOARD ACTION**

I move to approve the request from the Idaho Division of Career Technical Education for the allocation of the FY 2024 appropriation as detailed in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_

**Idaho Division of Career Technical Education**  
**By Appropriation Unit, Account Category and Fund**

	FY 2024	FY 2023	% Inc/(Dcr)
<b>EDEA - Administration</b>			
By Account Category			
50 Personnel Costs	1,936,600.00	1,939,600.00	0%
55 Operating Expenditures	407,000.00	382,200.00	6%
60 Capital Outlay	11,400.00		
Total	2,355,000.00	2,321,800.00	1%
By Fund			
10000 General Fund	2,335,000.00	2,301,800.00	1%
34800 Federal Grants	20,000.00	20,000.00	0%
Total	2,355,000.00	2,321,800.00	1%
<b>EDEB - Secondary and General</b>			
By Account Category			
50 Personnel Costs	1,951,300.00	1,746,100.00	12%
55 Operating Expenditures	542,000.00	542,000.00	0%
60 Capital Outlay	-	3,600.00	-100%
70 Trustee and Benefit Payments	33,018,400.00	17,886,700.00	85%
Total	35,511,700.00	20,178,400.00	76%
By Fund			
10000 General Fund	16,465,000.00	16,163,800.00	2%
In Demand Career Fund	15,000,000.00	-	
34500 ARPA/Federal COVID-19 Relief	0	3,600.00	-100%
34800 Federal Grants	4,021,700.00	3,986,000.00	1%
34900 Miscellaneous Revenue	25,000.00	25,000.00	0%
Total	35,511,700.00	20,178,400.00	76%
<b>EDEC - Postsecondary</b>			
By Account Category			
50 Personnel Costs	47,919,800.00	45,517,800.00	5%
55 Operating Expenditures	5,200,300.00	5,134,600.00	1%
60 Capital Outlay	42,300.00	107,700.00	-61%
70 Trustee and Benefit Payments	7,685,500.00	2,685,500.00	186%
Total	60,847,900.00	53,445,600.00	14%
By Fund			
10000 General Fund	53,162,400.00	50,760,100.00	5%
In Demand Career Fund	5,000,000.00		
34800 Federal Grants	2,685,500.00	2,685,500.00	0%
Total	60,847,900.00	53,445,600.00	14%
<b>EDED - Educator Services</b>			
By Account Category			
50 Personnel Costs	595,400.00	294,900.00	102%
55 Operating Expenditures	509,100.00	509,100.00	0%
60 Capital Outlay	3,800.00	-	
70 Trustee and Benefit Payments	702,500.00	702,500.00	0%
Total	1,810,800.00	1,506,500.00	20%
By Fund			
10000 General Fund	1,535,800.00	1,231,500.00	25%
34900 Miscellaneous Revenue	275,000.00	275,000.00	0%
Total	1,810,800.00	1,506,500.00	20%



EDEJ - Related Programs

By Account Category

50 Personnel Costs	1,073,200.00	815,400.00	32%
55 Operating Expenditures	243,600.00	231,100.00	5%
60 Capital Outlay	442,400.00		
70 Trustee and Benefit Payments	6,012,200.00	5,739,800.00	5%
Total	7,771,400.00	5,739,800.00	35%

By Fund

10000 General Fund	3,011,100.00	2,734,800.00	10%
21800 Displaced Homemaker	170,000.00	170,000.00	0%
27400 Hazardous Materials	67,800.00	67,800.00	0%
34800 Federal Grants	4,507,500.00	3,798,700.00	19%
34900 Miscellaneous Revenue	15,000.00	15,000.00	0%
Total	7,771,400.00	6,786,300.00	15%

EDEK- Other Services (Continous Appropriation per IC 33-4904)

By Account Category

70 Trustee and Benefit Payments	-	-	-
Total	-	-	-

By Fund

31901 Motorcycle Safety Training	-	-	-
Total	-	-	-

All Functions

By Account Cteory

50 Personnel Costs	53,476,300.00	50,313,800.00	6%
55 Operating Expenditures	6,902,000.00	6,799,000.00	2%
60 Capital Outlay	499,900.00	111,300.00	349%
70 Trustee and Benefit Payments	47,418,600.00	27,014,500.00	76%
Total	108,296,800.00	84,238,600.00	29%

By Fund

10000 General Fund	76,509,300.00	73,192,000.00	5%
In Demand Career Fund	20,000,000.00	-	
21800 Displaced Homemaker	170,000.00	170,000.00	0%
27400 Hazardous Materials	67,800.00	67,800.00	0%
34500 ARPA/Federal COVID-19 Relief	-	3,600.00	-100%
34800 Federal Grants	11,234,700.00	10,490,200.00	7%
34900 Miscellaneous Revenue	315,000.00	315,000.00	0%
Total	108,296,800.00	84,238,600.00	29%

LEGISLATURE OF THE STATE OF IDAHO  
 Sixty-seventh Legislature First Regular Session - 2023

IN THE HOUSE OF REPRESENTATIVES

HOUSE BILL NO. 363

BY APPROPRIATIONS COMMITTEE

AN ACT

RELATING TO THE APPROPRIATION TO THE DIVISION OF CAREER TECHNICAL EDUCATION;  
 APPROPRIATING MONEYS TO THE DIVISION OF CAREER TECHNICAL EDUCATION FOR  
 FISCAL YEAR 2024; EXEMPTING THE APPROPRIATION FROM OBJECT TRANSFER LIM-  
 ITATIONS FOR POSTSECONDARY PROGRAMS; PROVIDING FOR ACCOUNTABILITY RE-  
 PORTS; AND DECLARING AN EMERGENCY AND PROVIDING AN EFFECTIVE DATE.

Be It Enacted by the Legislature of the State of Idaho:

SECTION 1. There is hereby appropriated to the Division of Career Tech-  
 nical Education the following amounts to be expended according to the desig-  
 nated programs and expense classes from the listed funds for the period July  
 1, 2023, through June 30, 2024:

	FOR	FOR	FOR	FOR	TOTAL
	PERSONNEL	OPERATING	CAPITAL	TRUSTEE AND	
	COSTS	EXPENDITURES	OUTLAY	BENEFIT	
				PAYMENTS	
I. CTE ADMINISTRATION:					
FROM:					
General					
Fund	\$1,936,600	\$387,000	\$11,400		\$2,335,000
Federal Grant					
Fund	<u>0</u>	<u>20,000</u>	<u>0</u>		<u>20,000</u>
TOTAL	\$1,936,600	\$407,000	\$11,400		\$2,355,000
II. SECONDARY AND GENERAL PROGRAMS:					
FROM:					
General					
Fund	\$1,192,800	\$239,200		\$15,033,000	\$16,465,000
In Demand Career					
Fund				10,000,000	10,000,000
Miscellaneous Revenue					
Fund		25,000			25,000
Federal Grant					
Fund	<u>758,500</u>	<u>277,800</u>		<u>2,985,400</u>	<u>4,021,700</u>
TOTAL	\$1,951,300	\$542,000		\$28,018,400	\$30,511,700

	FOR	FOR	FOR	FOR		
	PERSONNEL	OPERATING	CAPITAL	TRUSTEE AND		
	COSTS	EXPENDITURES	OUTLAY	BENEFIT	TOTAL	
				PAYMENTS		
5	III. POSTSECONDARY PROGRAMS:					
6	FROM:					
7	General					
8	Fund	\$47,919,800	\$5,200,300	\$42,300	\$53,162,400	
9	In Demand Career					
10	Fund			\$5,000,000	5,000,000	
11	Federal Grant					
12	Fund	<u>0</u>	<u>0</u>	<u>2,685,500</u>	<u>2,685,500</u>	
13	TOTAL	\$47,919,800	\$5,200,300	\$42,300	\$7,685,500	\$60,847,900
14	IV. EDUCATOR SERVICES PROGRAM:					
15	FROM:					
16	General					
17	Fund	\$595,400	\$234,100	\$3,800	\$702,500	\$1,535,800
18	Miscellaneous Revenue					
19	Fund	<u>0</u>	<u>275,000</u>	<u>0</u>	<u>0</u>	<u>275,000</u>
20	TOTAL	\$595,400	\$509,100	\$3,800	\$702,500	\$1,810,800
21	V. RELATED PROGRAMS:					
22	FROM:					
23	General					
24	Fund	\$770,200	\$143,300	\$7,600	\$2,090,000	\$3,011,100
25	Displaced Homemaker					
26	Fund			170,000	170,000	
27	Hazardous Materials/Waste Enforcement					
28	Fund			67,800	67,800	
29	Miscellaneous Revenue					
30	Fund		15,000		15,000	
31	Federal Grant					
32	Fund	<u>303,000</u>	<u>85,300</u>	<u>434,800</u>	<u>3,684,400</u>	<u>4,507,500</u>
33	TOTAL	\$1,073,200	\$243,600	\$442,400	\$6,012,200	\$7,771,400
34	GRAND TOTAL	\$53,476,300	\$6,902,000	\$499,900	\$42,418,600	\$103,296,800

35 SECTION 2. EXEMPTIONS FROM OBJECT TRANSFER LIMITATIONS. Postsecondary  
36 Programs within the Division of Career Technical Education are hereby ex-  
37 empted from the provisions of Section 67-3511(1) and (3), Idaho Code, allow-

1     ing unlimited transfers between expense classes for all moneys appropriated  
2     to it for the period July 1, 2023, through June 30, 2024. Legislative appro-  
3     priations shall not be transferred from one fund to another fund unless ex-  
4     pressly approved by the Legislature.

5             SECTION 3. ACCOUNTABILITY REPORTS. Funds specifically identified in  
6     statute or in an appropriation act as intended for a certain purpose may be  
7     used only for that purpose. All funds provided in this act shall be subject  
8     to accountability reports and management reviews in accordance with Section  
9     67-702, Idaho Code.

10            SECTION 4. An emergency existing therefor, which emergency is hereby  
11     declared to exist, this act shall be in full force and effect on and after  
12     July 1, 2023.

## STATEMENT OF PURPOSE

RS30737 / H0363

This is the FY 2024 original appropriation bill for the Division of Career Technical Education. It appropriates a total of \$103,296,800. The bill funds seven line items, which provides 6.00 FTP and \$592,900 for additional CTE persopnnel, 4.50 FTP and \$581,800 for postsecondary staff, \$131,700 for higher enrollment funding, 1.00 FTP and \$910,700 for an apprenticeship grant, realignment of funds between programs in conjunction with LUMA, \$434,800 for firefighter training equipment, \$15,000,000 for secondary and postsecondary CTE program support, and \$39,500 for human resource consolidation.

## FISCAL NOTE

	FTP	Gen	Ded	Fed	Total
FY 2023 Original Appropriation	553.64	73,192,000	552,800	10,493,800	84,238,600
Prior Year Reappropriation	0.00	10,030,000	0	200	10,030,200
FY 2023 Estimated Expenditures	553.64	83,222,000	552,800	10,494,000	94,268,800
Removal of Onetime Expenditures	(1.00)	(10,137,700)	0	(653,600)	(10,791,300)
FY 2024 Base	552.64	73,084,300	552,800	9,840,400	83,477,500
Personnel Benefit Costs	0.00	422,400	0	9,800	432,200
Statewide Cost Allocation	0.00	19,800	0	0	19,800
Change in Employee Compensation	0.00	1,644,800	0	31,100	1,675,900
FY 2024 Program Maintenance	552.64	75,171,300	552,800	9,881,300	85,605,400
DHR Consolidation	0.00	31,600	0	7,900	39,500
1. Additional CTE Personnel	6.00	592,900	0	0	592,900
2. New Postsecondary Staff Support	4.50	581,800	0	0	581,800
3. Funding for Higher Enrollment	0.00	131,700	0	0	131,700
4. Apprenticeship Grant	1.00	0	0	910,700	910,700
5. Personnel Cost Realignment	0.00	0	0	0	0
6. Gov. Initiative - Firefighter Training Grant	0.00	0	0	434,800	434,800
7. Additional CTE Program Support	0.00	0	15,000,000	0	15,000,000
Budget Law Exemptions/Other Adjustments	0.00	0	0	0	0
FY 2024 Total	564.14	76,509,300	15,552,800	11,234,700	103,296,800
Chg from FY 2023 Orig Approp	10.50	3,317,300	15,000,000	740,900	19,058,200
% Chg from FY 2023 Orig Approp.	1.9%	4.5%	2,713.5%	7.1%	22.6%

**Contact:**

Representative Steve Miller  
 (208) 332-1061  
 Senator Janie Ward-Engelking  
 (208) 332-1412

**DISCLAIMER:** This statement of purpose and fiscal note are a mere attachment to this bill and prepared by a proponent of the bill. It is neither intended as an expression of legislative intent nor intended for any use outside of the legislative process, including judicial review (Joint Rule 18).

LEGISLATURE OF THE STATE OF IDAHO  
Sixty-seventh Legislature First Regular Session - 2023

IN THE HOUSE OF REPRESENTATIVES

HOUSE BILL NO. 364

BY APPROPRIATIONS COMMITTEE

AN ACT

1 RELATING TO APPROPRIATIONS; PROVIDING FOR A CASH TRANSFER FROM THE IN-DE-  
2 MAND CAREERS FUND TO THE IDAHO CAREER READY STUDENTS PROGRAM FUND FOR  
3 FISCAL YEAR 2024; APPROPRIATING ADDITIONAL MONEYS TO THE STATE DEPART-  
4 MENT OF EDUCATION FOR FISCAL YEAR 2024; APPROPRIATING ADDITIONAL MONEYS  
5 TO THE DIVISION OF CAREER TECHNICAL EDUCATION FOR FISCAL YEAR 2024; AND  
6 DECLARING AN EMERGENCY AND PROVIDING AN EFFECTIVE DATE.  
7

8 Be It Enacted by the Legislature of the State of Idaho:

9 SECTION 1. There is hereby appropriated and the Office of the State Con-  
10 troller shall transfer \$45,000,000 from the In-Demand Careers Fund to the  
11 Idaho Career Ready Students Program Fund on July 1, 2023, or as soon there-  
12 after as practicable for the period July 1, 2023, through June 30, 2024.

13 SECTION 2. In addition to any other appropriation provided by law,  
14 there is hereby appropriated to the State Department of Education for the  
15 Student Services Program \$45,000,000 from the Idaho Career Ready Students  
16 Program Fund to be expended for trustee and benefit payments for the period  
17 July 1, 2023, through June 30, 2024.

18 SECTION 3. In addition to any other appropriation provided by law,  
19 there is hereby appropriated to the Division of Career Technical Education  
20 for the Secondary and General Programs Program \$5,000,000 from the In-Demand  
21 Careers Fund to be expended for trustee and benefit payments for the period  
22 July 1, 2023, through June 30, 2024.

23 SECTION 4. An emergency existing therefor, which emergency is hereby  
24 declared to exist, this act shall be in full force and effect on and after  
25 July 1, 2023.

**STATEMENT OF PURPOSE**

**RS30757 / H0364**

This is the trailer appropriation bill to House Bill 267, which expands the capacity of career technical education (CTE) in Idaho middle and high schools for grades 7-12, with an emphasis on rural and remote communities.

**FISCAL NOTE**

This bill transfers and appropriates \$45,000,000 from the In-Demand Careers Fund to the Idaho Career Ready Students Program Fund for the Department of Education, and appropriates \$5,000,000 from the In-Demand Careers Fund for the Division of Career Technical Education for a grand total of \$50,000,000 from the In-Demand Careers Fund.

**Contact:**

Representative James Petzke  
(208) 332-1043  
Senator Janie Ward-Engelking  
(208) 332-1412

**DISCLAIMER:** This statement of purpose and fiscal note are a mere attachment to this bill and prepared by a proponent of the bill. It is neither intended as an expression of legislative intent nor intended for any use outside of the legislative process, including judicial review (Joint Rule 18).

**CONSENT**  
**APRIL 25, 2023**

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**SUBJECT**

FY 2024 Idaho Opportunity Scholarship Educational Costs

**REFERENCE**

April 2016	The Board set the FY 2017 maximum annual award amount at \$3,000, expected student contribution at \$3,000 and educational cost for each institution.
December 2016	Board reviewed annual State Scholarship Report.
April 2017	The Board set the FY 2018 maximum annual award amount at \$3,500, expected student contribution at \$3,000 and educational cost for each institution.
December 2017	Board reviewed annual State Scholarship Report.
April 2018	The Board set the FY 2019 maximum annual award amount at \$3,500, expected student contribution at \$3,000 and educational cost for each institution.
December 2018	Board reviewed annual State Scholarship Report.
April 2019	The Board set the FY 2020 maximum annual award amount at \$3,500, expected student contribution at \$3,000 and educational cost for each institution.
December 2019	Board reviewed annual State Scholarship Report.
April 2020	The Board set the FY 2021 maximum annual award amount at \$3,500, expected student contribution at \$3,000 and educational cost for each institution.
April 2021	The Board set the FY 2022 maximum annual award amount at \$3,500, expected student contribution at \$3,000 and educational cost for each institution.
April 2022	The Board set the FY 2023 maximum annual award amount at \$3,500, expected student contribution at \$3,000 and educational cost for each institution.

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-4303, Idaho Code  
IDAPA 08.01.13, Rules Governing the Opportunity Scholarship Program

**BACKGROUND/ DISCUSSION**

The Legislature appropriated approximately \$27.7M in the FY 2022 budget for Scholarships and Grants managed by the Office of the State Board of Education. This amount is made up of approximately \$22.2M from the General Fund, \$1M from Miscellaneous Revenue, and \$4.5M in federal funds. In addition to the Idaho Opportunity Scholarship, the Scholarships and Grants appropriation covers the Work Study Program, Armed Forces and Public Safety Officer Scholarship, GEARUP Idaho Scholarship, and the Postsecondary Credit Scholarship. The GEARUP Idaho Scholarship is part of a state and federal cooperative program.

The Idaho Opportunity Scholarship is a hybrid scholarship combining academic merit with financial need and is based on a shared model of responsibility between



**CONSENT**  
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the state and the student. Students must meet the minimum academic merit requirement set in Administrative Code to be eligible. Eligible students are then ranked based on a combination of need and merit. Need is based on the students' expected family contribution calculated on the Free Application for Federal Student Aid (FAFSA) at the time of application and makes up 70% of the weighting used for ranking students. The remaining 30% is based on the students' cumulative grade point average. Beginning in FY 2019, the Board was authorized to award up to 20% of the amount appropriated for the Idaho Opportunity Scholarship for adult students who have earned at least 24 credits toward a certificate or degree and who return to complete a certificate or degree. Pursuant to Section 33-4303, Idaho Code, the purpose of the Idaho Opportunity Scholarship is to:

- a. Recognize that all Idaho citizens benefit from an educated citizenry;
- b. Increase individual economic vitality and improve the overall quality of life for many of Idaho's citizens;
- c. Provide access to eligible Idaho postsecondary education through funding to remove financial barriers;
- d. Increase the opportunity for economically disadvantaged Idaho students; and
- e. Incentivize students to complete a postsecondary education degree or certificate.

Section 33-4303, Idaho Code requires the Board set annually the educational costs for attending an eligible Idaho postsecondary institution; and to establish the need and merit criteria, the expected contributions of the student, the student's family and available federal financial aid, and the maximum educational costs. These criteria along with the application process are established in Administrative Code, IDAPA 08.01.13.

The educational cost is the amount determined by the Board as necessary for student tuition, fees, books, and other such expenses reasonably related to attendance at an eligible Idaho postsecondary educational institution. This cost is used in determining the monetary value of the Opportunity Scholarship. Pursuant to IDAPA 08.01.13, these amounts are required to be set for each eligible institution annually. Staff recommendations for determining this amount are based on the institutions' published educational cost for full-time undergraduate students attending two semesters per year.

While not required by statute or rule, the Board has historically set a maximum award amount in order to increase the number of awardees. Pursuant to Section 33-4303, Idaho Code, the maximum award amount may not exceed the actual education costs at the eligible institution the student attends or the educational costs established by the Board. When a student's cost for tuition and fees is over the maximum award amount, the award is limited to the set maximum award amount. Should the Board choose not to set a maximum award amount, the award would be limited by the actual cost to the student of tuition and fees and the

**CONSENT  
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maximum educational cost. A student's actual costs are not typically known at the time the initial awards are made. The maximum award amount allows for staff to make preliminary estimates of the total amount needed to cover awards in a given year, thereby allowing more awards to be distributed earlier.

Regardless of whether a student attended a 2-year or a 4-year institution, in FY 2022 the majority of students received awards at or near the maximum award amount. The following table shows the total funds distributed for the Opportunity Scholarship by academic year attended, the number of students awarded, and the average amount of the award for that year.

School Year	Amount	Number of Awards	Average Award Amount
2014-2015	\$4,916,579	1,465	\$3,440
2015-2016	\$5,146,248	1,868	\$2,881
2016-2017	\$9,868,532	3,454	\$2,857
2017-2018	\$11,418,815	3,724	\$3,066
2018-2019	\$14,197,231	4,318	\$3,288
2019-2020	\$20,809,523	6,206	\$3,352
2020-2021	\$20,533,644	6,248	\$3,270
2021-2022	\$20,532,236	6,229	\$3,301
2022-2023	\$20,638,772	6,303	\$3,275

Of the awards made for the 2022-23 school year, 80 awardees earned the scholarship under the provisions established for Adult Learners.

Individual student award amounts for the Opportunity Scholarship are calculated based on: the educational cost for the institution the student attends, the student contribution amount, other scholarships and financial aid the student receives, actual tuition costs, and the maximum award amount. Students may use scholarships and grants that do not come from institutional, state, or federal funds to offset the student contribution amount. Student loans are not included in the calculation of the eligible award amount.

As an example, based on the proposed amounts, if a student attends the University of Idaho with a set educational cost of \$21,898, the Opportunity Scholarship award amount would be calculated as follows:

	<u>Student A</u>	<u>Student B</u>	<u>Student C</u>
Educational Cost for Institution	\$22,254	\$22,254	\$22,254
Student Contribution	\$3,000	\$3,000	\$3,000
Other Scholarships and Financial Aid	\$10,000	\$16,000	\$5,000
Total Remaining	\$8,898	\$3,254	\$13,898
Maximum Eligible Award Amount	\$3,500	\$3,254	\$3,500

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**APRIL 25, 2023**

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The actual award amount for each student may be further adjusted based on how other scholarships and financial aid are required to be applied and the actual amount charged to the student. Payments are deposited into the students' institution account on the students' behalf.

**IMPACT**

Setting the educational cost and student contribution amounts fulfills the Board's responsibilities under administrative rule. Combined with setting the maximum award amount, this action will enable Board staff to begin processing applications and finalizing award determinations for FY 2023.

**ATTACHMENTS**

Attachment 1 – Educational Costs at Institutions

**BOARD STAFF COMMENTS AND RECOMMENDATIONS**

Senate Bill 1177 (2023), setting the Special Programs FY 24 budget, appropriates \$24.3M from the General Fund, \$1M from miscellaneous revenue, and \$4.5M in federal funds for scholarship awards made for the 2023-2024 school year.

To be eligible for the Idaho Opportunity Scholarship a student must meet the minimum academic requirements established in Idaho Code and Administrative Code.

Pursuant to Section 33-4303, Idaho Code, an eligible student must:

- be an Idaho resident as defined in Section [33-3717B](#), Idaho Code;
- have graduated or will graduate from an accredited high school or its equivalent in Idaho;
- have enrolled or applied to an eligible Idaho postsecondary educational institution;
- be a postsecondary undergraduate student who has not previously completed a baccalaureate degree or higher; and
- meet need and merit criteria as set by the Board.

The need and merit requirements set by the Board are established in IDAPA 08.01.13:

- 2.7 GPA or higher (or its equivalent as determined by a college entrance exam); adult learners may apply with a 2.5 GPA;
- good standing with postsecondary institution if renewing;
- completed the applicable course load requirements for renewal; and
- completed the FAFSA by the deadline.

Traditional applicants must attend full time and meet the minimum applicable credit requirements. Individuals with 24 or more earned credits who were granted the scholarship under the adult learner provision may attend part time, within the minimum part time credit hour requirements.

**CONSENT**  
**APRIL 25, 2023**

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Scholarships are awarded based on the student ranking until the appropriated amount is expended. Students are ranked based on the combination of the student need and student merit criteria. Up to 20% of the scholarship may be set aside for adult learners with some credits and no degree, however, due to the low number of adult learner applicants a much smaller amount is set aside each year.

Based on the educational costs for each eligible institution, staff recommends the FY 2023 educational cost for the Idaho Opportunity Scholarship award formula to be set for each public institution as follows:

1. \$22,846 for students attending University of Idaho (2.6% increase over FY 2022)
2. \$26,621 for students attending Boise State University (4.3% increase over FY 2022)
3. \$23,178 for students attending Idaho State University (.37% decrease over FY 2022)
4. \$20,356 for students attending Lewis-Clark State College (6.9% increase over FY 2022)
5. \$17,668 for students attending College of Eastern Idaho (5.3% increase over FY 2022)
6. \$14,650 for students attending College of Southern Idaho (0% increase over FY 2022)
7. \$16,323 for students attending College of Western Idaho (2.7% decrease over FY 2022)
8. \$16,739 for students attending North Idaho College (12.2% increase over FY 2022)

Pursuant to IDAPA 08.01.13, the FY 2024 educational cost for the Idaho Opportunity Scholarship award formula for students attending eligible Idaho private, not-for-profit postsecondary institutions must be the average of the amount set for the four public four-year institutions. For FY2024, this amount would be \$23,250.

Staff recommends:

- The FY 2024 student contribution remain \$3,000, and to accept student-initiated scholarships and non-institutional and non-federal aid as part of the student contribution; and
- The maximum award amount remain at \$3,500 for FY 2023.

**BOARD ACTION**

I move to approve the FY 2023 educational cost for the Idaho Opportunity Scholarship award be set not to exceed the amounts set forth in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**AND**

**CONSENT**  
**APRIL 25, 2023**

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I move to approve the Opportunity Scholarship maximum award amount for FY 2023 to be set at \$3,500.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**AND**

I move to approve the FY 2023 student contribution be set at \$3,000 and to accept student-initiated scholarships and non-institutional and non-federal aid as part of the student contribution.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**ATTACHMENT 1**

**Educational Costs at Institutions**

University of Idaho	\$22,846
Boise State University	\$26,621
Idaho State University	\$23,178
Lewis-Clark State College	\$20,356
College of Eastern Idaho	\$17,668
College of Southern Idaho	\$14,650
College of Western Idaho	\$16,323
North Idaho College	\$16,739

**CONSENT**  
**APRIL 25, 2023**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Student Health Insurance Contract with Arthur J. Gallagher Risk Management Services, Inc.

**REFERENCE**

June 2022 Board approved Boise State University's request to extend the student health insurance contract with Relation Insurance Services-Education Inc. for one year.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.I.3.a.

**BACKGROUND/DISCUSSION**

Boise State University (BSU) completed a public Request for Proposal for student health insurance policies to provide insurance services to its International, Graduate, and Athletics students (RFP #NS22-140), and sent a Letter of Intent to Award the contract to A.J. Gallagher on December 1, 2022.

The requested contract is for student health insurance policies and associated broker services for a base term of three years, with additional annual renewal options. The projected annual policy costs total \$1,925,191, with adjustments ranging between \$1.8 million and \$2 million depending on the number of participating students and athletes. Specifically, the three policies are projected to cost annually as follows: 1) Graduate Student Policy - \$1,528,000; 2) International Student Policy - \$273,400; and 3) Intercollegiate Athletic Policy – not to exceed \$123,791.

Embedded in the above costs are annual brokerage fees paid to Gallagher. These total \$85,000 and represent a \$38,000 annual savings over the prior contract.

**IMPACT**

The expiration of the previous broker contract and rising health insurance costs drove the need to review BSU's pricing and policy makeup. The resulting public procurement process allowed for a full review of these policies and the opportunity for cost savings through the award of these services to a new broker. The services provide continuity and peace of mind to the students that access health care through BSU. BSU anticipates that the cost of providing services will not exceed \$2 million annually.

**ATTACHMENTS**

- Attachment 1 - Redacted proposal from Gallagher
- Attachment 2 - Quotation for International / Graduate Students
- Attachment 3 - Quotation for Athletics

**CONSENT**  
**APRIL 25, 2023**

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**STAFF COMMENTS AND RECOMMENDATIONS**

The other four-year institutions are not at a point of change in their student health insurance contracts, but the institutions will work together to determine if it is in their best interest to work on future student health insurance contract procurement processes together.

Staff recommends approval.

**BOARD ACTION**

I move to approve the request by Boise State University to enter into a three (3) year agreement with Arthur J. Gallagher Risk Management Services, Inc. to broker student health insurance policies.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_



# Boise State University

2022 Student Insurance and Wellness Programs  
Administrator Services Contract and Student Insurance  
Plans and Intercollegiate Athlete Insurance Request for  
Proposal

RFP # NS22-140

1910 University Drive, MS 1210  
Boise, ID 83725-1210

October 25, 2022

Lyndsay Paparo, National Account Executive  
Arthur J. Gallagher Risk Management Services, Inc.  
Gallagher Student Health & Special Risk  
Lyndsay\_Paparo@ajg.com  
gallagherstudent.com

Kelly Ethier, Vice President  
Arthur J. Gallagher Risk Management Services, Inc.  
Gallagher Student Health & Special Risk  
Kelly\_Ethier@ajg.com  
gallagherstudent.com

*This information was developed from proprietary sources and constitutes the confidential work product of Arthur J. Gallagher & Co. (Gallagher). By accepting delivery of this information, Boise State University agrees to maintain the contents as confidential. No part of this information may be reproduced or distributed to any other party beyond Boise State University, its members, and its consultant without the written permission of Gallagher.*



October 25, 2022

Nancy Schwend, Senior Buyer  
1910 University Drive, MS-1210  
Boise, ID 83725-1210  
[nschwend@boisestate.edu](mailto:nschwend@boisestate.edu)  
208-899-0001

Dear Nancy,

Gallagher Student Health, a division of Arthur J. Gallagher Risk Management Services, is pleased to present our proposal for Insurance Broker/Insurance Program Administrator Services for Student Health Insurance Plans and Intercollegiate Sports Plan for Boise State University.

Our offer brings competitive pricing, a consultative approach, expert resources, and a dedicated service team providing on campus support, all delivered by a recognized leader in the higher education community. Gallagher manages over 800 University clients across the United States with student health, intercollegiate athletic accident, mandatory student accident, and ~~the~~ study abroad insurance policies. ***Our sole focus is student insurance...it's what we do.***

When you choose Gallagher as your broker, you receive more advantages, including:

**Proven Track Record.** We manage student insurance policies for more than 800 higher education clients across the nation, representing over 40 different states, including the University of Wyoming and Oregon State University. Additionally, we are the undisputed broker working in the athletic space with more than 70 NCAA DI institutions nationwide. We've partnered with these clients and implemented changes that have achieved savings, administrative efficiencies, and a more sustainable insurance program.


**A Better Approach.** Gallagher has experts in student health, mandatory student accident, athletics, study abroad, and international student and scholar policies on one team, allowing us to develop a more coordinated approach that reduces overlaps, maximizes coverages, and minimizes premiums. Also, our colleagues in AJG's Property & Casualty office have managed the program for the State of Idaho since 2004. With Gallagher managing the P&C for the State system provides synergies and the administrative ease of working with one firm from multiple lines of coverage.

**Unmatched Service.** We deliver a "client comes first" approach. You will have a dedicated Service Team with Senior Leadership, Account Executives, Account Managers and Account Service Representatives, Web/IT staff, and an entire customer service team to support students, families, and administrators. Our team is knowledgeable and highly responsive, as shown by our Annual Client Survey results, 97% of our clients reported being ***"very satisfied with our account management team's knowledge and responsiveness."***

**Competitive and Flexible Pricing.** We can quote two options: 1) Broker/ Consulting Services or 2) Broker AND full program management, including enrollment and waiver management with or without verification. We can be the first point of contact for all students, parents, and administrators. We will help them enroll or waive, and navigate the health care system, providing a 'hands-on' high touch service approach, which takes the administrative burden and any potential conflict of interest off the University. We have long standing relationships with all student insurance carriers in the Idaho market, including Wellfleet, and we can accommodate either option and are happy to work with you in whichever capacity you prefer.

We are excited about the opportunity to work with Boise State University on the student health insurance and intercollegiate accident programs. We have delivered high quality, cost-effective insurance programs to many Colleges and Universities across the country. We bring a national perspective, while supporting you locally. We have the capacity and deep resources to meet your needs and we welcome the opportunity to partner with you. Please don't hesitate to reach out with any questions and we look forward to hearing about next steps.

Sincerely,



Lyndsay Paparo  
National Account Executive, Student Health Insurance  
[Lyndsay\\_Paparo@AJG.com](mailto:Lyndsay_Paparo@AJG.com)



Kelly Ethier  
Vice President, Intercollegiate Sports & Special Risk  
[Kelly\\_Ethier@AJG.com](mailto:Kelly_Ethier@AJG.com)

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# Attachment 2 – Signature Page

(M) Attachment 2 - Signature Page

THIS PAGE **MUST BE FILLED OUT, SIGNED AND RETURNED WITH PROPOSAL. SIGNATURE MAY BE ELECTRONIC USING ONE OF THESE ACCEPTABLE METHODS: DOCUSIGN, ADOBE SIGN OR SIGNNOW. MODIFICATIONS TO THIS PAGE MAY DEEM THE ENTIRE PROPOSAL NON-RESPONSIVE AND NO FURTHER CONSIDERATION WILL BE GIVEN.**

BY SUBMISSION OF THIS PROPOSAL TO BOISE STATE UNIVERSITY, THE UNDERSIGNED HEREBY OFFERS TO SELL TO BOISE STATE UNIVERSITY THE SPECIFIED PROPERTY AND/OR SERVICES. IF THIS PROPOSAL IS ACCEPTED WITHIN A REASONABLE TIME FROM DATE OF CLOSING, AT THE PRICE SHOWN IN OUR PROPOSAL AND UNDER ALL THE TERMS AND CONDITIONS CONTAINED IN, OR INCORPORATED BY REFERENCE, INTO THE BOISE STATE UNIVERSITY'S RFP, AS MAY BE AMENDED PRIOR TO THE DATE HEREOF IN ACCORDANCE WITH THE TERMS OF THE RFP.

AS THE UNDERSIGNED, I ALSO CERTIFY I AM AUTHORIZED TO SIGN THIS PROPOSAL FOR THE OFFEROR AND THE PROPOSAL IS MADE WITHOUT CONNECTION TO ANY PERSON, FIRM, OR CORPORATION MAKING A PROPOSAL FOR THE SAME GOODS AND/OR SERVICES AND IS IN ALL RESPECTS FAIR AND WITHOUT COLLUSION OR FRAUD.

NO LIABILITY WILL BE ASSUMED BY BOISE STATE UNIVERSITY FOR AN OFFEROR'S FAILURE TO OBTAIN THE TERMS AND CONDITIONS IN A TIMELY MANNER FOR USE IN THE RESPONSE TO THIS RFP OR ANY OTHER FAILURE BY THE OFFEROR TO CONSIDER THE TERMS AND CONDITIONS IN THE OFFEROR'S RESPONSE TO THE RFP.

ADDITIONAL OR SUPPLEMENTAL TERMS AND CONDITIONS MAY BE CONSIDERED FOLLOWING THE DATE HEREOF ONLY IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE RFP.

FAILURE TO COMPLY WITH THESE REQUIREMENTS MAY RESULT IN DISQUALIFICATION AND YOUR ENTIRE RESPONSE BEING DEEMED NON-RESPONSIVE.

Please complete the following information:

OFFEROR NAME Arthur J. Gallagher Risk Management Services, Inc.

ADDRESS 500 Victory Rd

CITY Quincy STATE MA ZIP CODE 02171

TOLL-FREE # 800-457-5599 x6421 PHONE # 617-769-6421

EMAIL dan\_buckley@ajg.com FEDERAL TAX ID / SSN 362102482

  
\_\_\_\_\_

Signature

10/04/2022

Date

Dan Buckley

Type or print name

Division Senior Vice President

Title



## (ME) Attachment 3 – VPAT

Please answer the following questions and return this form with your RFP submittal Boise State Policy 8140 - Accessibility requires the University to evaluate software purchased or acquired to assure it meets accessibility standards, to the extent feasible.

1. Is sensitive data (PCI, PII, FERPA, or HIPAA) being stored or transmitted? If so, a Boise State Vendor Security Assessment or the latest full HECVAT is required.  
**A copy of our current VPAT is attached and full HECVAT has been completed and will be provided when Boise State has completed review of Gallagher edits to the Boise State University NDA.**
2. Please list the data fields being stored/processed.  
**Please see attached GSH- Standard Data Layout with Examples**
3. Will this software procurement require the use of existing Boise State data?  
**This is not a software procurement. Gallagher will be providing broker and administrative services for Boise State University SHIP program which will require the use of student data.**
4. Boise State requires without exception that all sensitive and/or regulated University data must be stored within the continental United States so that US regulations and law apply. This vendor must comply with this requirement and disclose to Boise State University the state, and/or region where the data will be stored as part of the University's Software and Accessibility Review Board (SARB) approval process.  
**We store our data in the following locations:**
  - AWS US East & US West regions
  - Salesforce NA149 (Washington DC)
  - Azure Central US, East US 2 (Virginia)
5. Is the stored data encrypted? All Boise State data should be encrypted, if at all possible, but is required for sensitive data.  
**We only encrypt sensitive data**
6. Will your firm send emails on the University's behalf (e.g., as @boisestate.edu and/or @u.boisestate.edu)? If so, does the vendor support DKIM (Domain Keys Identified Mail)?  
**No**
7. Please provide contact information for your company person/team who handles accessibility.  
**Mark Jourdan [mark\\_jourdan@ajg.com](mailto:mark_jourdan@ajg.com) , Director of Application Development**
8. Does your firm have an accessibility roadmap?  
**Yes, we are provided guidance through LevelAccess.**



9. What is the process for responding to accessibility issues?  
**A ticket is logged into our service desk system. It is reviewed by the team and prioritized within future development sprints.**
10. What is the processing for testing/fixing accessibility issues during development?  
**We have a couple tools we actively use AMP (provided by LevelAccess), Lighthouse and SiteImprove.**
11. Does your firm have a current VPAT available? If so, provide most recent version of VPAT.  
**Yes, attached is our latest VPAT review which was completed in October 2021.**
12. How have VPAT claims been verified?  
**We use a third-party auditor, Level Access (<https://www.levelaccess.com/>) to perform an annual VPAT certification.**
13. Does your firm have accessibility reviews you can share?  
**Yes, we can share reports that we can pull from our LevelAccess tool AMP. We can pull reports from SiteImprove as well.**
14. Is your firm aware of the Boise State Policy 8140 - Accessibility?  
**Yes**

# Attachment 4 – Insurance Requirement Deviations

### (M) Attachment 4 - Insurance Requirements Deviations

The 3<sup>rd</sup> Party Contractor/Vendor/Performer (“Insured”) performing duties/services/events or seeking to use facilities at Boise State University (“Certificate Holder”) is required to carry the types and limits of insurance shown in this request, and to immediately provide Certificate Holder with a Certificate of Insurance. Certificate shall be executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

All insurers shall have an “AM Best” rating (or equivalent) of A- or better and be licensed and admitted in Idaho. All policies required shall be written as primary policies (**General Liability only**) and not contributing to nor in excess of any coverage Certificate Holder may choose to maintain.

**Required Insurance Coverage** - Insured shall obtain insurance of the types and in the amounts described below. (\*\*)

- **Commercial General Liability Insurance.** Insured shall maintain commercial general liability (CGL) with a limit of not less than **\$1,000,000** each occurrence and **\$2,000,000** aggregate.
- **Professional Liability.** If applicable, Insured shall maintain Professional Liability (Errors & Omissions) insurance of not less than **\$1,000,000** on a “claims made” basis, covering claims made during the policy period and reported within three years of the date of occurrence.
- **Liquor Liability.** If applicable, Insured shall maintain Liquor Liability in the amount of **\$1,000,000** each occurrence and **\$2,000,000** aggregate. (**Delete not associated with our services**)
- **Automobile Liability.** If applicable, Insured shall maintain Automobile Liability in the amount of **\$1,000,000** Combined Single Limit. Coverage shall include Non-owned and Hired auto coverage.
- **Workers’ Compensation.** Insured shall maintain all statutorily required Workers’ Compensation coverages to include Employer’s Liability at minimum limits of \$100,000/\$100,000/\$500,000.
- **Certificate Holder and *Additional Insured* shall read:**
  - **State of Idaho and Boise State University**
  - **Attn: Risk Management**
  - **1910 University Drive**
  - **Boise, ID 83725**
- All policies, except Workers’ Compensation, shall name Certificate Holder as an additional insured. A copy of the ***Additional Insured Endorsement*** must be attached to the Certificate and Addl. Insr. boxes checked, verifying that the Insured’s policy(s) has been endorsed as required (otherwise, the certificate will be considered incomplete).
- Should any of the above described policies be canceled before the expiration date thereof, notice will be delivered in accordance with the policy provisions. (**General Liability only**)

(\*\* Boise State University Risk Management reserves the right to modify coverage and/or limits.)

Attachment 5 – Offerors Proposal

Requirements	Provide Explanation or Yes/No Answer
<p><b>1. (ME) Company History/Qualifications.</b> The Broker must have no less than five (5) years of successful performance as an insurance broker and plan administrator for customers requiring services comparable in size and complexity to those required in this RFP.</p>	<p>Gallagher Student Health &amp; Special Risk (GSH), a division of Arthur J. Gallagher &amp; Co. (AJG), is an independent insurance brokerage that has been solely dedicated to providing student health insurance and athletic accident products to colleges and universities for more than 25 years. Student insurance...it's what we do.</p> <p><u>Our firm:</u></p> <ul style="list-style-type: none"> <li>• Serves approximately 800 clients (200 SHIP, 200 Global and 400 Intercollegiate Sports)</li> <li>• Has extensive experience working with higher-education institutions like Boise State University, including the University of Wyoming and Oregon State University</li> <li>• Manages more than \$350 million in premium</li> <li>• Serves the needs of nearly 380,000 enrolled students</li> <li>• Maintains clients in 47 states and is the only national practice in the student health space</li> <li>• Achieves 97 percent client retention year over year and,</li> <li>• Is a division of AJG, named by Ethisphere Institute as one of the world's most ethical companies for twelve straight years.</li> </ul> <p>We have delivered high quality, cost effective insurance programs to many Colleges and Universities across the country. We will bring a national perspective while supporting you locally.</p> <p>In 1994, Koster Insurance Agency was one of the first brokerages to focus exclusively on student health. Today, twenty-five years later, we are a division of AJG, a Fortune 500 company with more than 33,000 employees across 710 offices worldwide. Our Gallagher Student Health division employs approximately 60 highly skilled professionals who are passionate about your students' wellbeing and academic success.</p> <p>Please see Exhibit #1, Getting to Know Gallagher, for more information Please see Exhibit #2, for a Partial Gallagher Client List. Please see Exhibit #3 for a summary on our Intercollegiate Athletic Accident program broker services.</p>
<p><b>2. (ME) Company History/Qualifications.</b> The Broker must provide a detailed description of the Broker's background, experience, and qualifications relevant to managing the SHIP. The qualifications should provide information about the individuals who would be key contact for the University.</p>	<p>Brokerage and consulting services for the student health insurance plan will be provided by the Senior Vice President of Student Health Programs, Martha Murphy and National Account Executive, Lyndsay Paparo. Gallagher is also the nation's leader in the placement and management of mandatory student accident and intercollegiate athletics policies. The Intercollegiate Sports Plan will be managed and serviced by Senior Vice President of Special Risk, Daniel Buckley, and Vice President of Special Risk,</p>

Kelly Ethier. Our team will also work closely with our property & casualty peers at Gallagher who have been the broker for the State of Idaho since 2004. With Gallagher experts representing the student health insurance plan, intercollegiate athletics plan, and property & casualty for the State of Idaho, we will ensure cross-collaboration on all lines of coverage and identify any potential gaps in Boise State's risk management portfolio. We will work with Boise State University to ensure coordination between these policies. We believe that expertise in all of these areas are necessary so we can meet you student needs whether it be on or off the field, at home or away.

Each Gallagher team member dedicated to Boise State University has the capacity, experience and qualifications to deliver the requested scope of services and to ensure your satisfaction.



**Martha Murphy, Senior Vice President, Student Health Insurance**

**Role:** Lead Consultant, Strategic Oversight for Student Health Insurance Policy; One of the primary contacts for BSU

**Qualifications:** Martha is a licensed broker and an experienced health care professional with more than twenty-five years in the industry. She has managed multiple lines of business including student health, employee benefits and retirement plans. She has worked closely with State and Federal agencies in the implementation of the Affordable Care Act (ACA) and the launch of the public marketplace. Martha worked for a health insurance company for more than 20 years. She led the launch of a student health product and understands underwriting, pricing and rate development, provider and pharmacy networks, and implementing new clients.



**Lyndsay Paparo, National Account Executive, Student Health Insurance**

**Role:** Lyndsay is a licensed producer and will be one of the primary contacts for implementation and ongoing program management for the Student Health Insurance Plan for BSU

**Qualifications:** Lyndsay is a licensed broker and has more than 12 years health care industry experience working at various insurance companies including Blue Cross Blue Shield. She has a proven track record onboarding and managing strategic clients across the US.



**Daniel J. Buckley, Senior Vice President, Sports & Special Risk**

**Role:** Dan is a licensed producer, leads the Sports division and will be a primary contact. Dan manages the Special Risk division and oversees the department that manages over 400 clients.

**Qualifications:** Dan has over 20+ years in the insurance industry. As the Senior Vice President of the Sports and Special Risk department, Dan oversees a higher education book of business that consists of key accounts including University of Wyoming and Oregon State University. Dan is committed to delivering the highest level of account management and customer service, and consistently retains over 98% of his clients year-over-year.



**Kelly Ethier, Vice President, Sports & Special Risk**

**Role:** Kelly is a licensed producer, leads the Sports division and will be the primary contact for the athletic accident policy. Kelly manages strategic clients across the US.

**Qualifications:** Kelly has firsthand knowledge of the unique needs that are inherent with college athletics as she was a Division III student-athlete herself, who also has a master’s degree in Sports Administration. Kelly delivers consultative guidance and support on matters that relate to student accident and athletic accident insurance policies, all while working closely with her carrier partners to ensure the best level of coverage is available for her clients. In 2019, Kelly was recognized as a Power Broker by Risk & Insurance Magazine for her work managing accident medical policies and for providing superior service to her Higher Education clients. Kelly prides herself on maintaining regular correspondence with her clients to answer day-to-day coverage questions, to review claims summary reports, for strategic planning, and to execute competitive renewal negotiations.



**Additional Gallagher Team Member:  
Michele Montgomery, CPCU, ARM-P, AINS  
Area Senior Vice President  
Higher Education – Public Sector  
Role: State of Idaho, Property & Casualty  
Insurance Broker**

Please refer to Exhibit #4 – Full Page Biographies

**3. (ME)** Describe how your firm would evaluate the medical insurance services offered to the University.

The Gallagher Student Health team stands ready to negotiate the most beneficial Student Health Insurance Plan terms for Boise



	<p>State University and your students. Here’s how we will achieve this task:</p> <ul style="list-style-type: none"> <li>• First, we will conduct a full plan review and analyze all aspects of your current programs and benchmark them against industry trends, peer institutions and market conditions.</li> <li>• Second, GSH will analyze and evaluate specific plan coverage and student demographics, historical premium and claims data, claims utilization patterns, and high-dollar claims experience.</li> <li>• Third, GSH will work with Boise State University stakeholders to identify specific cost drivers on campus to evaluate their overall plan impact.</li> <li>• Finally, GSH will establish a “best practice” comparison and make detailed recommendations to help Boise State University achieve maximum quality and cost-effectiveness.</li> </ul> <p>Additionally, we will perform the following tasks to assure our plan recommendations are on target:</p> <ul style="list-style-type: none"> <li>• Examine provider-network fee schedules to establish and maintain the most competitive arrangements.</li> <li>• Provide audit and evaluation against service and performance standards.</li> <li>• Assess network access and utilization and make recommendations on plan design and alternative options to address claims utilization and cost savings.</li> </ul> <p>So here’s the bottom line when it comes to GSH’s plan-design capabilities. Our singular focus on higher education enables us to deliver relevant, timely information and services to our clients. We share with all of our clients best practices drawn from our first-hand experience of managing student health programs. We also leverage our experience working with multiple large, public, state universities to provide you with the best recommendations and program design options available.</p>
<p><b>4. (ME)</b> Describe how your firm would evaluate a plan’s mental health coverage.</p>	<p>We will conduct a deep dive into the master policy document of each carrier to analyze coverage for mental health benefits. We understand the Federal Mental Health Parity Law and can ensure carriers meet that requirement which essentially makes the cost of Mental Health services on par with general medicine visits. We can work with carriers to structure the benefits so that there is no barrier to accessing mental health care. In addition, we will do a geo-access report identifying all the mental health providers within 5-10 miles of each campus to ensure there is adequate access and that providers are accepting new patients. If key mental health providers are not contracted as in-network, we have been instrumental working with insurance carriers on developing direct contracts with those providers, or establishing</p>



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	<p>processes so that the mental health provider is paid at in-network levels, keeping the cost of care low for students.</p> <p>Additionally, GSH is the exclusive partner of SilverCloud Health, a digital behavioral health platform that provides Cognitive Behavioral Therapy (CBT) that is proven to be as effective as 1:1 therapy. We also have a relationship with Teladoc, a leading telehealth vendor, and can implement a campus wide telehealth program for students, providing access to general medicine and behavioral health services (including therapy and psychiatry. We have also worked alongside campus counseling centers to implement provider solutions such as Mantra Health, which integrates with your current counseling center to provide supplemental providers.</p>
<p><b>5. (ME)</b> How do you ensure that you are carrier-neutral in your selection?</p>	<p>As an independent brokerage firm with access to many national and regional carriers, Gallagher Student Health is committed to bring our clients the best SHIP and ICS coverage on the market today. Our approach to market selection is preemptive. We do not ask all carriers to quote on your program because we know not all insurers can handle your specific needs. Criteria used for our carrier pre-selection process is both transparent and collaborative:</p> <p>We conduct a 360 evaluation based on the carrier's financial strength, provider network, ability to accommodate the University's needs, servicing capacity, customer-service functionalities for students and administrators alike.</p> <p>We also ask the University's for feedback on carrier selection.</p> <p>Once the pre-selection process is complete, we give all carriers access to the same information and direction. This means all quotes received will be based solely on the carrier's risk appetite.</p> <p>Finally, as a subsidiary of Arthur J. Gallagher, GSH is subject to the highest standards of transparency and professionalism. This obligates us to show clients all submitted insurer quotes. And while we will use our industry expertise to advise and consult on all proposals—and to make bold recommendations—the final decision rests with Boise State University.</p>
<p><b>6. (ME)</b> What strategies will you employ to negotiate the best possible rates and plan design on behalf of the University?</p>	<p><b><u>Our Strategic Approach and Competitive Advantage to Negotiating Renewals:</u></b></p> <p>As your independent broker/consultant, we will act as an advocate for Boise State University, deploying our negotiating power to your benefit. Gallagher achieves 97% client retention year over year with our student insurance programs, meaning we have vast experience negotiating premium rates and contracting renewals with chosen insurance carriers. As the</p>

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	<p>University's primary SHIP contacts, Martha Murphy and Lyndsay Paparo will coordinate the annual renewal process of gathering information, creating the submission, and leading the negotiation over competitive and comprehensive terms.</p> <p>At least 180 days prior to the policy renewal date, our team will meet with the University's campus stakeholders and insurance committee to establish a renewal strategy and identify specific needs to address. We will then approach the available student health insurance market for bids and will present the best alternatives that align with the University's agreed-upon objectives.</p> <p>Specifically, we will:</p> <p><b><u>Meet with all campus stakeholders:</u></b> As Boise State University's broker/consultant, we will meet with all campus stakeholders to understand strengths/weaknesses of the current policy. We will then submit a high-level overview to the SHIP Committee of findings that may affect the renewal process.</p> <p><b><u>Carrier claims analysis:</u></b> We receive carrier claim reports and will review them with Boise State University on a quarterly basis. Our goal is to identify any trends, concerns or opportunities that could impact the renewal. Immediately upon award, we will begin this analysis and request the carrier's rate indication on the "as is" renewal (renewal with no plan modifications). Then we will model benefit variations and pricing alternatives. We will communicate closely with Boise State University stakeholders throughout this process.</p> <p><b><u>Request renewal:</u></b> Once we establish a rate baseline, we request a formal renewal, including underwriting data for our team to analyze. This allows us to drill down on pricing components and rating methodology, identifying areas for cost savings and benefit enhancements.</p> <p><b><u>Advocacy and negotiation:</u></b> We will push back to ensure the proper medical inflation trend being applied, case-specific completion factors, and the weighting percentage of previous policy year's claims experience factored into the renewal calculation. Our approach has historically resulted in our clients receiving a favorable and accurate renewal.</p> <p><b><u>Go-to-Market Strategy:</u></b> After benchmarking peer institutions, meeting with campus administrators and reviewing the existing carrier renewal, GSH will market the program to at least four competitive and comprehensive student insurance carriers. We will report what we learn in a full network/provider access report and recommendations.</p>
<p><b>7. (ME)</b> Describe how you will support the University during any transition between carriers.</p>	<p>The keys to a seamless transition are communication and transparency. We believe that in order to successfully move to a new insurance program, expectations of both the brokerage firm and the University must be clear. That is why if selected, we propose:</p> <ul style="list-style-type: none"><li>• Devising an implementation schedule: This schedule lays out program milestones and deliverables in a timeline that works for the University and Gallagher Student</li><li>• Understanding stakeholders' needs: With a clear vision of</li></ul>

	<p>individual needs, we can accommodate for any deadlines or authorizations</p> <ul style="list-style-type: none"> <li>• Understanding the uniqueness of the student population: We work closely with the University to identify opportunities and address challenges to ensure that students have affordable and comprehensive care</li> <li>• Ensuring benefits and provider networks are analyzed and any gaps are identified and addressed prior making the carrier changes; we have success negotiating benefit enhancements and building networks and direct provider contracts (e.g. behavioral health) to achieve the least amount of disruption when moving to a new carrier</li> <li>• Establish methods of communication: Our dedicated IT and Client Service team will establish methods of communication for file transfers, waiver reports, status updates, and other project deliverables.</li> </ul> <p>Because of Gallagher Student’s experience and partnership with insurance carriers and third party claims administrators, we are well-positioned to seamlessly transition our services to your students. We currently integrate and transfer files with all the carriers. Our custom built school websites have links to carrier information and our call center triages students to carriers via a ‘warm transfer’, creating a seamless user friendly experience.</p> <p>During program implementation, our team will work with your campus administrators to ensure the program is marketed effectively and that students are provided with clear communication about any plan changes. We will leverage our marketing HUB expertise to design a communication plan to address all audiences including campus administrators, key stakeholders, students and parents.</p> <p>Furthermore, we would begin pre-renewal planning work for the 2023-2024 policy while your current broker completes any outstanding work on the 2022-2023 policy. Although we can begin the engagement as early as Q4, Gallagher would defer payment and wouldn’t bill for services until the student premium is collected in the Fall of 2023.</p> <p>Please see Exhibit #5 for more information on our Sample Implementation Timelines.</p>
<p><b>8. (ME)</b> Provide at least one example of how your advocacy for a client changed the outcome of a contract negotiation.</p>	<p>Gallagher Student Health manages more than \$350 million in premium and serves nearly 380,000 students nationwide. Our presence in the student-health market is robust; our influence on carriers, strong. We regularly advocate for our clients on all program features, including negotiating favorable pricing and fair claims adjudication.</p> <p><b><u>Advocacy Example #1 Student Health Insurance:</u></b></p> <p>A client with a fully insured contract was projected to receive an 11.5% rate increase upon renewal. Questioning the validity of this</p>

increase, we requested the insurer's underwriting worksheet. Based on our analysis, we discovered the rate increase should have been less than 5 percent. After doing a deep dive into their claims experience and considering the fact that the client was moving to mandatory coverage for international students, we recommended the carrier hold the line entirely on rates.

Despite intense push back, GSH marshaled data and deployed our extensive experience to bring home a fair renewal with no rate increase. This example illustrates how GSH's plan-design insights, insurance-industry experience, and client loyalty will serve to benefit Boise State University.

**Advocacy Example #2 Intercollegiate Sports:**

A client in Pennsylvania had seen their Intercollegiate Athletic Accident insurance premiums skyrocket by 98% over a three year period. The institution was a long time Gallagher Property & Casualty client, but had another broker managing the Intercollegiate Sports Plan. Our Gallagher peers invited us to participate in a quarterly stewardship meeting where we had the opportunity to present our NCAA DI Benchmark report.

Through our presentation and analysis of their current program, the institution realized their premiums were significantly higher than their peer institutions. We were given the opportunity to market their insurance program to over a dozen of our A-Rated insurance carrier partners. We sought competitive quotes on their behalf that matched their current plan design. In addition we showed options with higher per injury deductibles, and a self-insured retention program utilizing a stop loss policy with an aggregate deductible.

As part of our strategic efforts we worked with the college to develop a list of their top 10 most frequently utilized providers to ensure that a new claims administrator would offer enhanced discounts with their top 10 providers. Through our analysis with the proposed carrier and TPA we projected hundreds of thousands of dollars in claims savings.

Gallagher was awarded the broker of record in 2020. Not only were we successful in helping the college negotiate a refund in premium due to the COVID-19 pandemic that year, but we have helped negotiate reductions in their annual premiums year over year. Today their current premium is 10% less than it was three years ago and claims are trending in a positive direction.

**9. (ME)** The Broker must provide an outline of the types and scheduling of communications that will be distributed to students during the enrollment/waiver process. Samples of the communications should be provided in your

Gallagher Student Health provides an array of professional marketing materials and communication strategies to help clients provide critical health insurance information to its student body. This includes, but is not limited to:

response.

- **Plan documents**, including health insurance master policy, plan brochures, and benefit summary information.
- **Buck slips** for the University to include with electronic tuition bills, notifying students and parents of important plan details, dates and how to waive/enroll instructions.
- **Plan comparisons** for students and parents to evaluate their current plan benefits against Boise State University's sponsored plan.
- **Frequently Asked Questions** tailored to the University; outlines any changes in the plan and has a customized "how to" section to direct students and parents quickly and efficiently.
- **Universal email communications**, as well as tailored email solutions for distinct or unique populations of the student body. Utilizing Constant Contact, our team can track open rate, click through rate and immediately identify students that have not viewed communications to quickly target outreach to students notifying them of enrollment/waiver dates, welcome-to-the-plan emails, reminders etc. All communications are approved by campus administrators prior to distribution.
- **Onsite attendance and presentations** at campus orientations and meetings.
- **Mobile accessible custom school websites** such as [www.gallagherstudent.com/bsu](http://www.gallagherstudent.com/bsu)
- **Plan materials** like a *Fast Facts* reference flyer, *Summary of Benefits* brochures and *Frequently Asked Questions*.
- **Periodic email blasts and text messages** about the insurance plan.
- **Benefits app** through the insurance carrier (depending on the carrier selected).
- **Custom videos** to help students better understand insurance and navigate our online portal (through The Hub and College Health TV). Sample College Health TV video: <https://www.collegehealthtv.com/video/life-lessons-health-insurance-101>

What's more, international students need extra help understanding the U.S. healthcare system. We make insurance easy to understand for international students by providing materials and presentations that simplify benefits, explain how to get care, and detail the enrollment/waiver process.

Gallagher has additional expertise developing communications that resonate with students and parents across our diverse group of clients. Our professional marketing staff will develop materials in collaboration with Boise State University. During program implementation, our team will work with your campus administrators to ensure the program is marketed effectively and that students receive clear communication about their health coverage and plan changes. We will leverage our marketing team



	<p>expertise to design a communication plan to address all audiences, including campus administrators, key stakeholders, students and parents.</p> <p>For Sample Marketing Materials, please see Exhibit #6.</p>
<p><b>10. (ME)</b> The Broker will collaborate with University administrators to develop marketing and communication strategy and assist with the development of communication pieces (mailers, website, and other social media) as needed.</p>	<p>Confirmed. As outlined above, Gallagher Student Health will take several steps to market your plan. Although we have many years of experience in marketing student health programs, you know your students best. For this reason, we will review your past and current marketing efforts before designing our own marketing approach. With a plan in place, we will then deploy our in-house marketing team to create custom communication materials. A key feature of our campaign will be student email blasts to introduce them to their plan and to remind them of enrollment and waiver deadlines. Though many clients have moved to online/electronic communications, we provide value-added post card or letter mailings to students and their families. We also use on-campus orientations and/or information sessions to increase student awareness and usage of their SHIP benefits.</p> <p>However, the core of our marketing outreach will be a Boise State University page on the Gallagher Student Health website. It contains marketing materials to review or download (e.g.: benefit highlight flyer, an FAQ document, and a full brochure detailing plan provisions and benefits.)</p> <p>Following are additional features of our website:</p> <ul style="list-style-type: none"> <li>• Customized, BSU-specific secure portal for eligibility file transfers</li> <li>• Access to robust online waiver/enrollment management system to manage student enrollment and coordinate with Bursar’s Office/Student Accounts</li> <li>• Ability to view individual student records for eligibility and demographic information or run complete enrollment roster</li> <li>• View plan benefit and enrollment information by downloading brochures and FAQs</li> <li>• Find information on provider networks, pharmacy benefits, and additional plan enhancements</li> <li>• Access to Gallagher Customer Service through a dedicated 800-number, Customer Service link or online “Live Chat” through the school’s homepage at <a href="http://www.gallagherstudent.com/bsu">www.gallagherstudent.com/bsu</a></li> <li>• Enroll online or purchase available optional coverage such as dependent or supplemental plans securely via credit card or e-check</li> <li>• View HIPAA certificates, Certificate of Prior Coverages, or Verification of Coverage Letters ‘on-demand’ directly from the website in PDF format</li> <li>• Connect to the claims administrator’s website to review claim status online &amp; retrieve ID cards</li> </ul>

	<p>We will provide BSU with a full complement of marketing resources and materials to help students with their college student health insurance. Our firm has its own internal marketing agency called “The Hub.” Housed in Gallagher’s national Small Business and Affinity division, The Hub includes three graphic designers, three account managers, a web specialist, and two copywriters. We also have an onsite marketing specialist whose job is to strategize with sales and account management teams on delivery and communication to client schools and their students. Our marketing team understands the student and parent “personas” we serve and how to communicate to them. In addition to what we typically provide clients below, we can also work with you to develop custom flyers, videos or website materials.</p> <p>Also available on our website is our portfolio of voluntary products available to all students attending BSU. These include the following:</p> <ul style="list-style-type: none"> <li>• Voluntary Dental Insurance</li> <li>• Voluntary Vision Insurance</li> <li>• Personal Property Insurance</li> <li>• Tuition Refund Insurance</li> <li>• Study Abroad or Travel Insurance</li> </ul>
<p><b>11 (ME) The Broker will be responsible for the cost of any communications that are developed. The University will be given drafts of all communication for written approval prior to distribution in any fashion to students.</b></p>	<p>Confirm and agree.</p>
<p><b>12. (ME) The Broker will attend Student Orientation and presentations as requested.</b></p>	<p>Gallagher representatives will be available to attend student orientations sessions as requested by Boise State University.</p>
<p><b>13. (ME) The Broker must explain the enrollment process and how it will be managed, what is required by the University during this process and how inquiries from students, parents, and University administrators will be handled.</b></p>	<p>The Gallagher Student Health enrollment experience is user friendly and tailored to the campus needs.</p> <p>GSH offers both automatic and on-line enrollment options. Campus systems that provide eligibility rosters can automatically enroll eligible students. GSH offers custom student portal messaging for students to confirm auto enrollment and get information on any next steps. As part of the GSH plan administration services the student portal and your client management team will provide direct email updates to eligible, enrolled, waived students when coverage status changes.</p> <p>For students that voluntarily enroll or have dependents, the Student portal provides an enrollment option. GSH offers several configurable items to tailor the enrollment.</p>

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	<ul style="list-style-type: none"><li>• Disclaimer for eligibility can be tailored to each school</li><li>• Dependent enrollment is optionally activated</li><li>• Coverage options presented are customized to fit various student population needs</li></ul> <p>University administrators will have access to their Gallagher service team as well as to the self-service administrator feature in the portal. Gallagher’s customer service team is available to provide support and help facilitate transactions for students and parents when using the portal.</p>
<p><b>14. (ME) The Broker must submit a sample timeline with the assumption the SHIP will start on August 1st each year. This timeline should address the date the online process will start, proposed deadlines for students to complete the process and the dates approved communications pieces will be distributed by the Broker to the students.</b></p>	<p>Gallagher Student Health will work closely with Boise State University stakeholders to develop a customized implementation plan for each campus. We will completely assume all administrative responsibilities for your student health program, freeing your staff to focus on other key responsibilities on campus. This is equivalent to hiring new campus employees at no additional expense.</p> <p>Please see Exhibit #5 for a detailed description of our Sample Implementation Timelines.</p>
<p><b>15. (ME) The Broker must explain the premium payment process for all students.</b></p>	<p>Gallagher can set up enrollment transactions to be either “university invoice” so the school can add the fee to the student account, or “direct pay” where the student pays through directly through Gallagher’s portal. For “direct pay” credit card or e-check is acceptable and a small processing fee is applied. In the portal, the student sees a recap of the enrollment request with premium cost if applicable. The ‘direct pay’ feature is generally utilized to support voluntary enrollment in the student health insurance plan, including dependent enrollment.</p> <p>For your mandatory international students, we can use enrollment data collected on a file and set the premium collection process to “University Invoice” so the school can add the fee to the student account. Gallagher will assign a financial analyst to the Boise State University account and this person will be the contact for all invoicing and reconciliation processes. During onboarding, we will work with you to develop a timeframe for producing an initial client invoice. Invoicing and reconciliation occurs for each coverage period. Our standard invoicing process for a new client is as follows:</p> <p>We invoice 50-75 percent of the previous year’s enrollment in early Fall. For reconciliation, a complete student roster will be sent to verify enrolled students against those who have been billed for student insurance. Towards the close of the policy year, there will be a final reconciliation and billing after both Boise State University and Gallagher Student Health agree upon the final enrollment and premium amount.</p>



**16. (ME) The Broker must explain what options are available to students when they incur a Qualifying Life Event.**

For students who initially waived the Student Health Insurance Plan, the Petition to Add (PTA) option gives students the opportunity to request SHIP coverage due to a qualifying event. Students experiencing such an event can complete the PTA form, attach the required loss of coverage proof (a letter from their prior carrier stating the loss of coverage and their last day of coverage) and submit it to the GSH Enrollment team. Students have 31 days from their last day of coverage to submit the form and documentation.

**17. (ME) Brokers must summarize the ongoing communications and customer services they will provide to students, parent, and administrative staff during the year.**

**Students and Parents:**

Gallagher Student Health is unique. Unlike most other brokerage firms that delegate service to the insurance carrier, GSH retains this key responsibility. We are the first point of contact for your students and parents. Our GSH Customer Service Team has the bandwidth to manage thousands of calls daily. Our call center is available Monday through Friday, 8:30AM to 8:00PM EST. We can expand our hours of operation and our call-volume capacity by deploying our overflow call center in Las Vegas, Nevada. Both centers employ licensed insurance representatives who understand student insurance. As part of our onboarding and implementation process for BSU, our representatives will be fully trained on the specifics of the BSU insurance program.

Students will have access to customer service through a dedicated, toll free 800-number, customer service link or online “Live Chat”. The dedicated 800 number will provide tracking and reporting of BSU-specific performance metrics. Post implementation, Gallagher will provide a comprehensive report demonstrating the high level of customer service your students will receive.

**More Resources and Services to Support Boise State University**

In addition to our Customer Service Team, we provide Interactive Voice Recognition (IVR) to provide automated assistance to students 24 hours per day/7 days per week. The IVR solution allows students to

- Confirm coverage and effective dates,
- Check the status of online forms, and
- Request ID cards and verification-of-coverage letters.

Our phone system also triages calls related to claim status to the appropriate insurance carrier or claims administrator. Or a GSH customer service representative will make a “warm” transfer to the claims administrator. Similarly, that entity will transfer calls placed to them that are not claims related back to GSH. We have

a service escalation process in place to resolve situations that require higher-level management expertise.

Gallagher also provides an online customer-service inquiry form that expedites student and parent service requests. In addition, the “Live Chat” feature of BSU’s customized GSH website is available for students/parents who prefer communicating online.

Another advantage of working with Gallagher is our relationship with Voiance. Voiance is a division of CyraCom International, Inc., the leading provider of language interpreting services. Voiance bridges communication gaps for schools and organizations that need rapid access to language assistance via phone, mobile app, written text, or in person. Due to our relationship with Voiance, we can support hundreds of languages, meeting the needs of BSU students and parents throughout the enrollment process and life of the policy. Our GSH customer service representatives will include a Voiance translator in a three-way conversation with the student as needed to ensure all of the student’s questions and needs are addressed more.

**Administrative Staff:**

As noted, Lyndsay Paparo and Martha Murphy will be your dedicated Gallagher Student Health representatives. These two highly trained professionals will ultimately be accountable for ensuring the success of your student health insurance program. Additionally, an Account Manager will be assigned to support the day-to-day administration of BSU’s SHIP. Your Gallagher team representatives will be the liaison between the insurance carrier and BSU.

***Gallagher Takes the Administrative Work Off Your Plate***

**Website for Administrators**

A cornerstone of the Gallagher model is our use of technology and online resources to better serve students, families and University staff. As discussed earlier, we provide a customized student website, serving as a convenient online portal for enrollment/waiver and plan resources. We also provide an administrators’ portal for university staff to obtain real-time reporting and information regarding The BSU SHIP. Our administrator portal allows your staff to search for a student’s insurance information and run reports on enrollment and waiver rosters to support student billing. With comprehensive query and self-reporting, administrators can:

- Create and download waiver status reports.
- Create and download enrollment rosters.
- Create reports based on student category (i.e., graduate, undergraduate, international).
- Create reports based on type of health insurance students input on waiver forms.

	<ul style="list-style-type: none"> <li>• Create ad-hoc reports that are customizable, selecting data elements that are important to BSU</li> </ul> <p>Our reports are designed for easy downloading for internal campus systems. What's more, they can provide cumulative or iterative data. Our online portal also allows administrators to set up automated batch reports, which will send you the data you need, when you need it. Batch reports are sent via encrypted email or SFTP in csv, semi-colon or pipe delimited. Our clients have praised the portal's ease of use and find that they are better able to service their student body with the online capabilities provided. We have included a screenshot of the client portal (See Exhibit #7 – Overview of Website Services and Capabilities).</p> <p><b>Website for Participants</b></p> <p>Our student portal will allow students to</p> <ul style="list-style-type: none"> <li>• View information about their plan benefits, provider networks, pharmacy benefits and additional plan enhancements.</li> <li>• Submit a waiver or enrollment form.</li> <li>• Handle online enrollment and payment for dependent coverage.</li> <li>• Connect with customer service representatives.</li> <li>• Access “My Account” to view student account information.</li> <li>• Connect directly to the Carrier website to look up online claims status &amp; Print an ID card.</li> </ul>
<p><b>18. (ME) Broker must state when Customer Service is available and whether online customer service is available via a form during off hours.</b></p>	<p>Our call center is available Monday through Friday, 8:30AM to 5:00 PM EST. Our call center employs licensed insurance representatives who understand student insurance and all the specifics of your program.</p> <p>As stated earlier, your students will have access to their dedicated school website that offers online customer service options, including live chat as well as 24/7 IVR assistance.</p>
<p><b>19. (ME) The University prefers that Broker’s product/service is accessible to people with disabilities (WCAG Compliant). Please confirm.</b></p>	<p>Confirmed.</p> <p>Our GSH websites are designed, developed, and operated in substantial conformance with generally recognized and accepted guidelines and/or standards for website accessibility. These standards include WCAG 2.0 AA.</p> <p>The GSH website was redesigned just over two years ago in order to enhance usability. Current features include:</p> <ul style="list-style-type: none"> <li>• Compatibility with industry standard browsers</li> <li>• Responsive design to ensure usability with common mobile screens and window resolutions</li> <li>• Compatibility with accessibility standards such as WCAG and VPAT</li> <li>• “Light screens” to ensure acceptable download times</li> </ul>

**ATTACHMENT 1**

	<ul style="list-style-type: none"> <li>• No use of Iframes</li> <li>• Optimal use of “above the crease” to minimize scrolling. Minimized wide pages.</li> <li>• Nominal use of style sheets to reduce fonts</li> <li>• No use of animated fonts, gifs or imbedded video that require add-ons</li> </ul>
<b>20. (ME)</b> Attach a current copy of your business and insurance licenses.	Please see Exhibit #8 for Gallagher licenses.
<b>21 (ME)</b> Provide the names, titles, phone #s, and email addresses of five (5) Broker references relating to any type of healthcare insurance services. Must be similar to the University in size and student body composition where Broker has brokered the SHIP plans.	
a. The Ohio State University	Janine Oman Senior Deputy Athletic Director & SWA 614-247-7678 Oman.7@osu.edu
b. University of Wisconsin System	Angela Ryan Director, Risk Management 608-263-4381 aryan@uwsa.edu
c. Oregon State University	Christina McKnight Director, Insurance & Risk Management Services 541-737-4957 Christina.McKnight@oregonstate.edu
d. University of Wyoming	William T. Wiseman (Tim) Chief Risk Officer 307-766-6787 wwiseman@uwyo.edu
e. University of Oklahoma	Cathy Krane Director Enterprise Risk Management 405-325-5695 cathykrane@ou.edu
<b>22 (ME)</b> Provide the names, titles, phone #s, and email addresses of five (5) Broker references relating specifically to student healthcare insurance services. Must be similar to the University in size and student body composition where Broker has brokered the SHIP plans.	
A University of Houston	Wayne Brown Director, Risk Management 713-743-0414 wwbrown@uh.edu

b University of Maine	Gretchen Catlin University Risk Manager Gretchen.Catlin@maine.edu 207-621-3038
C Louisiana State University	Andy Barker Athletic Insurance Administrative Manager 225-578-8315 abarker@lsu.edu
d Mississippi Institutions of Higher Learning	David S. Buford Director of Risk Management 601-432-6688 dbuford@mississippi.edu
E University of Nebraska System	Kevin Harford Director of Risk Management 402-472-7346 kharford@nebraska.edu
<b>23 (ME)</b> Provide the names, titles, phone #s, and email addresses of five (5) Program Administrator references relating to any type of healthcare insurance services. Must be similar to the	
A Boston University	Jim Donohue Director, Risk Management 617-353-4988 jdonohue@bu.edu
B Northeastern University	Madeleine Estabrook Senior Vice Chancellor 617.373.4384 m.estabrook@northeastern.edu
C Loyola Marymount University	Douglas Moore University Risk Manager 310-338-3071 Douglas.moore@lmu.edu
D Dartmouth College	Diane Kiefer Finance Manager, Dartmouth College Health Services 603-646-3800 Diana.Kiefer@dartmouth.edu
E Williams College	Robert McBain Health Services Administrator 413-597-3166 Rtm3@williams.edu

## Exhibits

1. Getting to Know Gallagher
2. Partial Client List
3. Intercollegiate Athletic Accident Brochure
4. Team Biographies
5. Sample Implementation Timeline
6. Sample Marketing Materials
7. Overview of Website Services & Capabilities
8. AJG Licenses
9. Sample Claims Summary Report
10. Amendment 1 – Receipt Confirmation

### Attachment 3 VPAT Exhibits

GSH Standard Data Layout with Examples

Gallagher VPAT – October 2021

# 1. Get to Know Gallagher



# We Care About Your Students As Much as You Do

## Proven Track Record

“Our dedicated Account Executive and Client Service Representative consistently provide open, transparent and exceptional support to Student Wellness and all USD campus partners. Their expertise has been instrumental in helping us navigate unique student and parent questions and concerns throughout the years of our insurance requirement.”

- Student Wellness  
University of San Diego

Gallagher successfully implements and communicates waiver management system improvements that directly impact our student’s ability to complete the waiver process effectively.”

- Risk Management & Insurance  
Cornell University

“Every claim filed through Gallagher is immediately processed with efficient and thorough follow-up, creating a smooth process from beginning to end.”

- Athletic Department Endicott College

“Gallagher spent time reviewing our options, highlighting the ones which would benefit us most, and is available to answer any questions we have about our athletic and student policy.”

- Athletic Department  
Reinhardt University

CONSENT - BAHR

## Student Insurance – it’s what we do.

As a school of higher education, you face many challenges: attracting and retaining students, the rising cost of tuition, a changing student demographic, new regulations, behavioral health concerns, a global pandemic that caused additional complexities, just to name a few. We understand those challenges and can help by relieving your administrative resources, improving your program and saving you money. You can then focus on what you do best, educating students.

Gallagher Student Health & Special Risk understands the challenges you face and we are here to help. We make recommendations that save money, improve your program *and* take the administrative burden off of you so you can focus on what you do best, educate.

There’s a reason we keep 97% of our clients year after year. It’s because of our “highly knowledgeable and responsive service team,” according to our annual client satisfaction survey. We are a national practice with the industry’s most experienced team of healthcare professionals. You can count on us to bring you a cost-effective, customized program. We think globally about student health trends but support you locally with on-site resources. Simply put, we make sure you and your students succeed.



# Scope of Services and Products

Check out what we can do for you...

Student Health	Athletics	Global
<ul style="list-style-type: none"> <li>✓ Conduct market review, benchmarking and competitive analysis</li> <li>✓ Provide Account Management services for fully and self-insured programs</li> <li>✓ Strategic renewal planning and carrier negotiation</li> <li>✓ Create and manage consortium purchasing opportunities</li> <li>✓ Offer full complement of customer support services: dedicated call center, 24/7 IVR assistance, online live chat services and text messaging</li> <li>✓ Dedicated service team to provide implementation support and ongoing account management services to campus administrators</li> </ul>	<ul style="list-style-type: none"> <li>✓ Intercollegiate athletic accident insurance programs</li> <li>✓ Fully-insured and self-funded options</li> <li>✓ Catastrophic and basic accident insurance/ cash benefit plans</li> <li>✓ Camps, clinics, club and intramural sports risk management</li> <li>✓ Primary insurance verification</li> <li>✓ International student athletic insurance plans</li> <li>✓ High limit, accidental death and dismemberment coverage</li> <li>✓ Concussion Care Insurance</li> </ul>	<ul style="list-style-type: none"> <li>✓ ACA comparable plans for J1 &amp; F1 international students and scholars</li> <li>✓ Study abroad insurance for students, faculty and staff</li> <li>✓ Short-term limited duration plans</li> <li>✓ 24/7 worldwide travel assistance programs</li> <li>✓ Customized program implementation</li> <li>✓ Cancel for Any Reason/Interruption for Any Reason (CFAR / IFAR)</li> </ul>
<ul style="list-style-type: none"> <li>✓ Customized waiver and enrollment management services, including optional single sign-on</li> <li>✓ Customized communication plans for program marketing</li> <li>✓ On-campus support for student/parent orientations</li> <li>✓ Guidance and consultation on student healthcare trends, regulatory issues and compliance</li> <li>✓ Identify and coordinate Student Health Center billing options with carriers, including ledger and third party billing</li> <li>✓ Plan enhancements to complement student health insurance – online health and fitness, Basix Dental Savings and EyeMed vision discount program</li> <li>✓ SilverCloud digital behavioral health platform, providing care for anxiety, stress and depression to all students, anytime, anywhere</li> <li>✓ Teladoc students will have access to unlimited visits for general medical, dermatology and mental health issues without traveling to or waiting in the provider's office</li> <li>✓ Mantra Health customized solution for colleges to expand the counseling services available to students on campus</li> </ul>	<h3 style="text-align: center; background-color: #0070C0; color: white; padding: 5px;">Consulting</h3> <ul style="list-style-type: none"> <li>✓ Regulatory and marketplace guidance</li> <li>✓ Conduct market review and competitive analysis</li> <li>✓ RFP development and process management</li> <li>✓ Assistance determining waiver criteria and management of online waiver process</li> <li>✓ Fully insured and self-funded solutions</li> <li>✓ Outsourcing Student health services</li> </ul>	<h3 style="text-align: center; background-color: #0070C0; color: white; padding: 5px;">Special Risk</h3> <ul style="list-style-type: none"> <li>✓ K-12 student accident coverage options</li> <li>✓ Collegiate student accident plans</li> <li>✓ Customized programs for camps, clinics, and events</li> <li>✓ Religious and nonprofit participant accident coverage</li> <li>✓ Event and cancellation/loss of revenue insurance</li> <li>✓ Student property insurance</li> <li>✓ Voluntary dental plans</li> <li>✓ Voluntary vision plans</li> <li>✓ Tuition insurance</li> </ul>

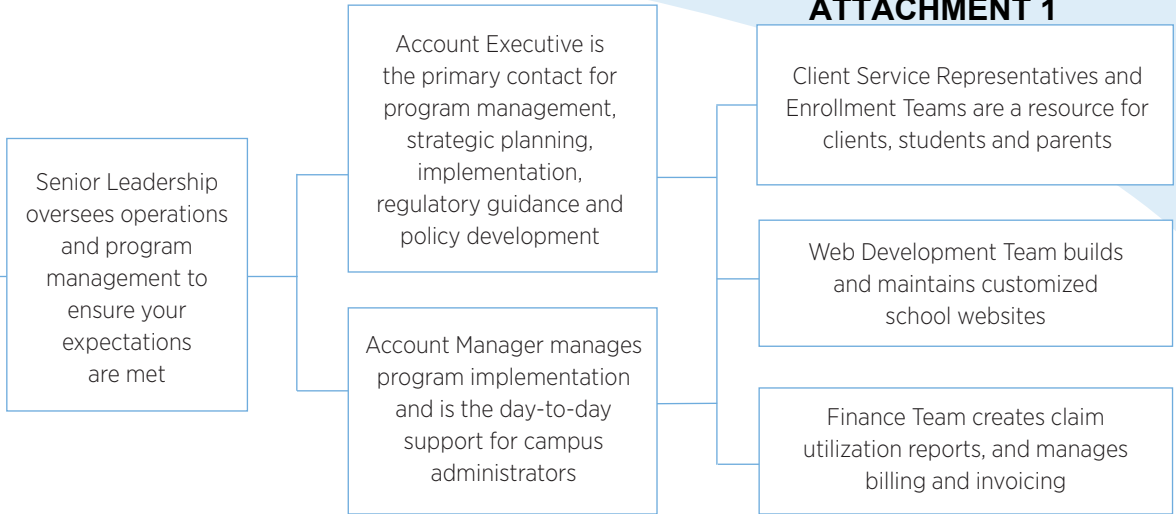
## Why You Should Choose Your Broker First

**By selecting a broker first, it streamlines the process; the broker handles much of the fact gathering, benchmarking and analysis that would normally fall to the school. Schools can ensure they receive optimum value for their insurance program by choosing a consultative broker that will work for the school rather than the insurance company. Choosing a trusted broker partner first and having your broker negotiate access to multiple competitive quotes will create competition, reduce premiums and lower your total cost of risk in the long-run.**

## ATTACHMENT 1

### We Bring a Team of Experts

Every client is assigned a dedicated account service team to ensure a seamless implementation and ongoing program success.



## The Gallagher Difference

- Awarded Risk & Insurance® Power Broker®, four years, nationally recognized for launching Medicaid Premium Assistance Program, Self-funding solutions and group purchasing consortiums across the country
- Professional partnerships with higher education risk management associations at the forefront of the student health industry, including ACHA, URMIA, NACUBO, NAFSA, NASPA and NATA
- Market Update webinars, Industry newsletters and whitepapers on new regulations and industry trends
- Commitment to our community through college internships, sponsorships and Gallagher Gives Back volunteering program
- Ethisphere Institute World's Most Ethical Companies for nine consecutive years; the only insurance broker to have been recognized

## Commitment From Our Senior Leadership Team



### Top leaders in the healthcare risk management and higher education community

*"In this evolving healthcare industry, we continually invest in our people and technology to make sure our clients meet the growing demands of their students. But one thing never changes...our unwavering commitment to bring value each and every day."*

- Peter Finney, Area President | [peter\\_finney@ajg.com](mailto:peter_finney@ajg.com)  
Leading the delivery of healthcare support services and operations for 25+ years.



**Martha Murphy**  
Senior Vice President of Student Health Sales  
Leading student health sales and marketing with 20+ years of experience in employee benefits and student health.  
[martha\\_murphy@ajg.com](mailto:martha_murphy@ajg.com)



**Sheryl Barron**  
Senior Vice President, Client Experience  
Leading service delivery for over 25+ years.  
[sheryl\\_barron@ajg.com](mailto:sheryl_barron@ajg.com)



**Dan Buckley**  
Senior Vice President  
Leading athletics and special risk sales and account management for 18+ years.  
[dan\\_buckley@ajg.com](mailto:dan_buckley@ajg.com)



**Dean Sandonato**  
Vice President  
Leading international travel sales and account management for 8+ years.  
[dean\\_sandonato@ajg.com](mailto:dean_sandonato@ajg.com)



**Diane Evans, Director,**  
Project Management Office (PMO)  
Leading project management and client onboarding for 30+ years.  
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**Jonathan Lamoureux**  
Vice President of Service Delivery and Consulting  
Leading service operations in healthcare for 20+ years.  
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**Scott Sullivan**  
Director of Finance  
Leading financial strategy and operations for 25+ years.  
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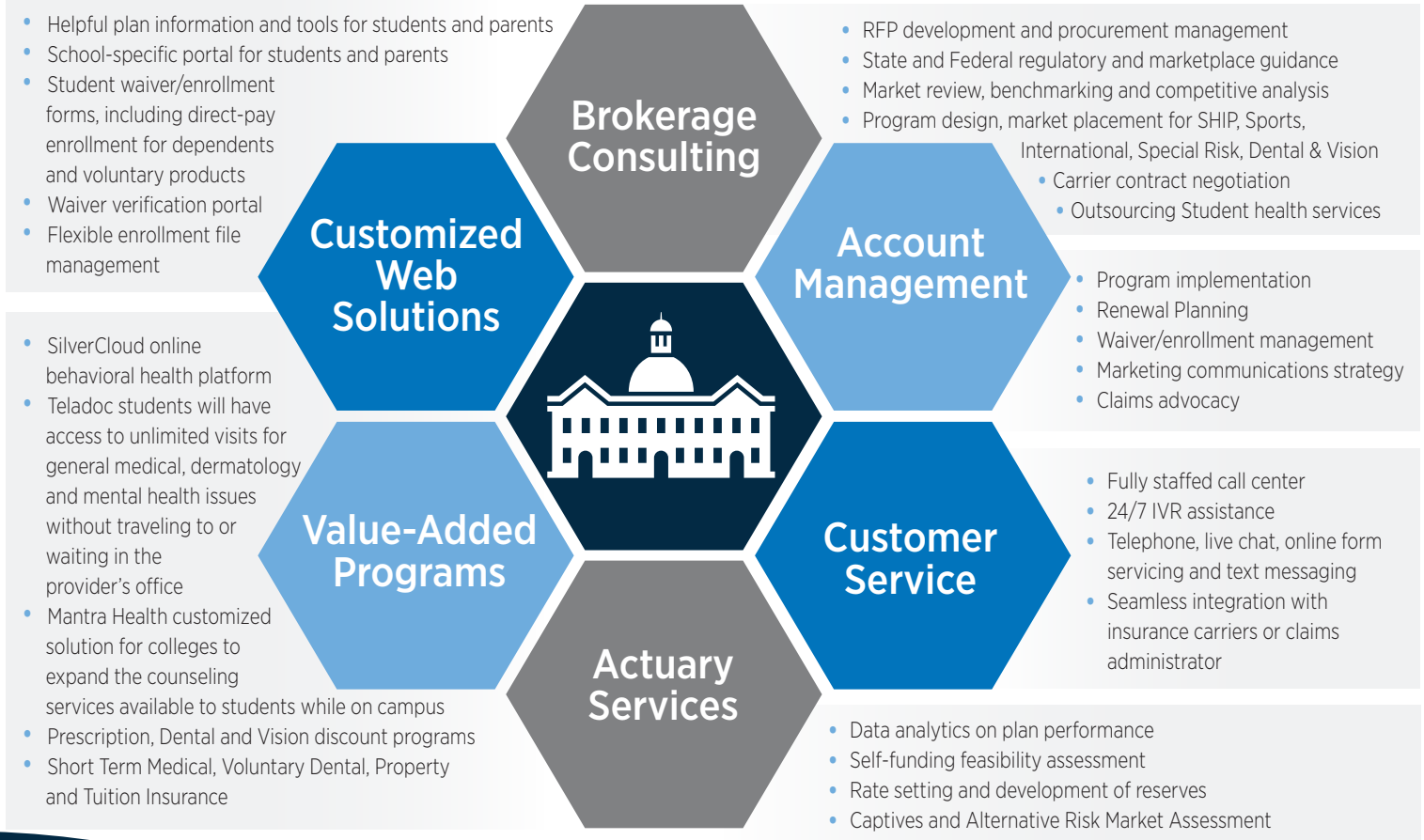


**John Malster**  
Director of Information Technology  
Leading technology, innovation and operations for 20+ years.  
[john\\_malster@ajg.com](mailto:john_malster@ajg.com)



# Unmatched Resources and Flexibility

We provide schools with a range of services that best fit their program and budget; from **consulting and brokerage services to full program management**, including waiver verification, customer service and a customized website. One of our main goals is to minimize your administrative burden.



## Independent Preferred Broker

- Independence from carriers to ensure competitive pricing
- Long-standing partnerships with top-rated insurance carriers, claims administrators, preferred provider organizations and pharmacy benefit management companies
- One of the first brokerages to focus exclusively on student health
- A division of one of the world's largest brokers and a Fortune 500 company

## We Strive for Service Excellence

- Industry-leading Waiver Management system processes 100% waiver verification in 24-48 hours
- Custom website designed to host the waiver and enrollment process for students
- Secure customized client portal, allowing school administrators easy access to reports and student data
- Comprehensive quality assurance program across all contact channels
- HIPAA and FERPA compliant business processes
- Ongoing training and staff development to deliver exceptional customer service
- Best-in-class customer service center standards; expands to meet demands

## 2. Gallagher Partial Client List

Redacted

## 3. Intercollegiate Athletic Accident Brochure



# Gallagher Broker Services Summary

## Intercollegiate Athletic Insurance

Daniel J. Buckley, Division Senior Vice President  
[Dan\\_Buckley@ajg.com](mailto:Dan_Buckley@ajg.com)

Kelly Ethier, Vice President  
[Kelly\\_Ethier@ajg.com](mailto:Kelly_Ethier@ajg.com)

Arthur J. Gallagher Risk Management Services, Inc.  
Gallagher Student Health & Special Risk  
[gallagherstudent.com](http://gallagherstudent.com)

**A Brief History of Gallagher Student Health & Special Risk**

500 Victory Rd, Quincy, MA 02171 - Phone 617-769-6421

As the leader in the Intercollegiate Athletic Accident Insurance market, Gallagher is uniquely positioned to provide superior service, program consulting and day to day management for Boise State University's Insurance program. With our market reach as part of Arthur J. Gallagher and our expertise with 25 years of service to this unique insurance niche, Gallagher designs high quality, customized and affordable Intercollegiate Athletic Accident Insurance for over 350 colleges and universities. We maintain an average 98% retention rate annually for our client programs, a figure demonstrative of our commitment to the industry and unmatched service.

Our unmatched market access, combined with our industry expertise, allow us to provide our clients with the best coverage, service and premium each year. No other broker has preferred access to all insurance carriers and third party claims administrators (TPAs) in this market. Our client programs truly benefit from this access and our relationships within the market. Additionally, our team has recently welcomed the addition of First Agency as an in house TPA option for our clients. First Agency has more than 60 years of experience administering claims in this niche market, working with programs of all sizes across the country. We are committed to offering our clients all options for their program and providing carrier and TPA recommendations that best fit the needs and goals of our clients and their programs. A summary of the carriers and TPAs is included later on in this summary

While market access and successful negotiations are important, at Gallagher we take pride in being more than a traditional insurance broker for our clients. Our dynamic business model has enabled us to cater to the customized needs of our clients, varying from large Power 5 Division I NCAA members to NJCAA school programs. Within our 350 Higher Education clients, we are the trusted broker managing programs for 80 NCAA DI institutions nationwide. Our scope of services are listed below, but not limited to:

- Acting as Boise State's claims advocate
- Manage the renewal process with the incumbent carrier and obtain additional renewal proposals, if appropriate, to guarantee competitive pricing and coverage terms
- Communicate with campus stakeholders to educate them on claims policies and procedures
- Provide relevant claim filing materials (FAQs, brochures, claims filing procedures, etc.) with policy information and benefits
- Distribution of periodic claim summary reports
- Ensuring that the Program complies with NCAA guidelines
- Annual Client Benchmarking Reports & Policy review to ensure the current program provides the best coverage and benefits
- Quarterly Market Update Series distribution

In addition to policy renewal negotiations, all of our clients rely on us for expert assistance with claims advocacy and management, renewal planning and cost containment strategies, claims reporting, risk identification and best practices recommendations, primary insurance verification, and overall account management. We will make best practice recommendations to your institution to not only provide cost effective solutions, but to ensure your student-athletes have the best coverage possible.

We look forward to the opportunity to demonstrate the industry leading expertise and value we can bring to Boise State University.





## Decades of Experience in Sports & Special Risk

### **RISK IDENTIFICATION: ARE ALL OF YOUR BASES COVERED?**

Gallagher Student Health & Special Risk specializes in meeting the athletic and special risk insurance needs of intercollegiate, club, and intramural athletic programs for colleges and universities. With 25 years of experience in the athletic insurance market, Gallagher has experienced the evolution of the athletic-specific insurance landscape.

Identifying every potential category of risk is a difficult task that is frequently pushed to the sidelines in the planning process. We have developed a systematic process to confirm each institution has the best coverage in place for their student athletes and the right policies to effectively manage coverage.

### **ATHLETIC INSURANCE COVERAGE: A TEAM EFFORT**

We are committed to providing the highest-quality client and customer service. We will work alongside your institution and all relevant partners to minimize miscommunication and promote transparency between each stakeholder involved with your athletic coverage.

- Account management
- Cost-containment strategies
- Insurance verification
- Claims advocacy & management
- Reporting capabilities

From claims advocacy and analysis to risk management recommendations, Gallagher will work alongside your institution to tailor your insurance solution to the forefront of compliance standards, ensuring a seamless transition as new regulations arise.



## Sports &amp; Special Risk Team



**POWER  
BROKER**  
RISK & INSURANCE

### Dan Buckley – Senior Vice President, Higher Education Practice Quincy, MA

<b>KEY ACTIVITIES</b>	Dan oversees all of Gallagher's Sports and Special Risk accounts as well as assisting the Division President with strategic planning and growth for the company. Dan remains dedicated to assisting his client schools in all aspects of their insurance programs including: policy renewal and general administration and also works with his clients to train College & University personnel on the policy procedures and guidelines. In 2021, Dan was recognized as a Power Broker by Risk & Insurance Magazine for his work managing accident medical policies and for providing superior service to his Higher Education clients.
<b>RELEVANT EXPERIENCE</b>	<ul style="list-style-type: none"> <li>• Gallagher Student Health and Special Risk (2007-Present)</li> <li>• Koster Insurance Agency (2001-2007)</li> <li>• Keyport Life Insurance (2000-2001)</li> <li>• John Hancock Insurance (1998-2000)</li> </ul>
<b>LICENSES/DESIGNATIONS</b>	<ul style="list-style-type: none"> <li>• Licensed Health &amp; Accident Producer</li> <li>• Licensed Property &amp; Casualty Producer</li> <li>• Licensed Surplus Lines Producer</li> </ul>



**POWER  
BROKER**  
RISK & INSURANCE

### Kelly Ethier – Vice President, Higher Education Practice Quincy, MA

<b>KEY ACTIVITIES</b>	Kelly has firsthand knowledge of the unique needs that are inherent with college athletics as she was a Division III student-athlete herself, who also has a master's degree in Sports Administration. Kelly delivers consultative guidance and support on matters that relate to student accident and athletic accident insurance policies, all while working closely with her carrier partners to ensure the best level of coverage is available for her clients. In 2019, Kelly was recognized as a Power Broker by Risk & Insurance Magazine for her work managing accident medical policies and for providing superior service to her Higher Education clients. Kelly prides herself on maintaining regular correspondence with her clients to answer day-to-day coverage questions, to review claims summary reports, for strategic planning, and to execute competitive renewal negotiations.
<b>RELEVANT EXPERIENCE</b>	<ul style="list-style-type: none"> <li>• Gallagher Student Health and Special Risk (2014-Present)</li> <li>• Wilbraham &amp; Monson Academy (2013-2014)</li> </ul>
<b>LICENSES/DESIGNATIONS</b>	<ul style="list-style-type: none"> <li>• Licensed Health &amp; Accident Producer</li> <li>• Bachelor of Arts, Sociology, Brandeis University (2012)</li> <li>• Master of Arts, Sports Leadership, Northeastern University (2014)</li> </ul>

## Market Reach

**Gallagher Special Risk has access to over a dozen A-Rated insurance carriers that specialize in the Athletic Insurance niche!**

Insurance Carrier Partners	
AIG (National Union Fire Insurance Co.)	Mutual of Omaha Insurance Co.**
Arch Insurance Company	North River Insurance
Axis Insurance Company	Pan-American Life Insurance Group
Berkley Accident & Health	Philadelphia Indemnity
Guarantee Trust Life Insurance Co.	QBE Insurance Corporation
Great American Insurance Co.	Starr Indemnity & Liability
The Hartford	United States Fire Insurance Co.
Liberty Mutual Insurance Co.	Wellfleet Insurance Company**
Lloyd's of London*	Zurich Insurance Company

\*Not an admitted insurance carrier, rather an insurance and reinsurance market

\*\*These insurance carriers also specialize in claims administration and do not commonly utilize a TPA

**Superior claims administration is vital to the success of a secondary insurance program, as such, we partner with more than a half dozen TPAs who specialize in this niche**

Third Party Administrators (TPA)	
★ 1 <sup>st</sup> Agency	Health Special Risk, Inc.
Administrative Concepts, Inc.	NAHGA Claim Services
★ A-G Administrators, LLC.	Relation Insurance Services
★ BMI Benefits, LLC.	WebTPA

## References

### **The Ohio State University**

Janine Oman  
Senior Deputy Athletic Director & SWA  
614-247-7678  
[Oman.7@osu.edu](mailto:Oman.7@osu.edu)

### **University of Wisconsin System**

Angela Ryan  
Director Risk Management  
608-263-4381  
[aryan@uwsa.edu](mailto:aryan@uwsa.edu)

### **Oregon State University**

Christina McKnight  
Director, Insurance & Risk Management Services  
541-737-4957  
[Christina.McKnight@oregonstate.edu](mailto:Christina.McKnight@oregonstate.edu)

### **Auburn University**

Cathy Cooper  
Director of Risk Management  
334-844-4533  
[coopera@auburn.edu](mailto:coopera@auburn.edu)

### **University of Oklahoma**

Wendy Beth Plummer, MBA, Med  
Administrative & Insurance Specialist  
405-325-8422  
[wplummer@ou.edu](mailto:wplummer@ou.edu)

### **University of Tennessee**

Pamela Jeffreys  
Director of Risk Management  
865-974-5409  
[pjeffrey@utk.com](mailto:pjeffrey@utk.com)

### **Louisiana State University**

Andy Barker  
Senior Associate Athletic Trainer  
225-578-8315  
[abarker@lsu.edu](mailto:abarker@lsu.edu)

## Attachments

1. Sports & Special Risk Market Update Series E-mail
2. Insurance Verification Services Flyer
3. Sample Gallagher NCAA DI Benchmarking
4. Sample Gallagher Claims Summary Report





## Sports & Special Risk Market Update

January 6, 2022

Hi Cara,

We hope you had a Happy Holiday and a Happy and Healthy New Year! With the spring semester around the corner, we thought this would be a good time to share our second quarterly Market Update Series for 2021-22. We hope you find this information helpful. Our goal with this series is to find interesting and relevant information to your institution's Student/Sports accident insurance policies.

This Sports & Special Risk Market Update Series features the NCAA updating the definition of fully vaccinated to include booster, a lack of clear-cut NCAA rules creating confusion about NIL (name, image, likeness), 3 NCAA Conferences completing series of student-athlete focused initiatives and how athletes are changing how they think about mental health.

**As always, please don't hesitate to contact us with any consultative questions or to discuss these topics in greater detail!**

---

### NCAA Updates Definition of Fully Vaccinated to Include Booster

The NCAA medical advisory group is changing its definition of a fully vaccinated individual as someone who has received the COVID-19 booster shot, if they are eligible. Athletes are eligible if they are within two months from getting the single shot from Johnson and Johnson; five months from the last Pfizer shot; and six months from the last Moderna shot.

These new protocols are only recommendations or "considerations" according to the NCAA. Conferences and schools can choose whether or not to follow them or create their own guidelines based on their local health department guidance.

[View This Article - NCAA Updates Definition of Fully Vaccinated to Include Booster](#)

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## Lack of Clear-Cut NCAA Rules Creates Confusion About NIL

Last summer, news broke that the NCAA will allow student-athletes to profit off of their name, image and likeness (NIL). However, some observers have compared the shift to the Wild West, as schools and players navigate this new terrain with little guidance.

The NCAA is tasked with overseeing the law and order of this uncharted territory. However, some states have no NIL laws, forcing colleges within their borders to rely on the loose guidelines provided by the NCAA.

The lack of a clear-cut policy has created confusion around NIL.

[View This Article - Lack of Clear-Cut NCAA Rules Creates Confusion About NIL](#)

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## ACC, Big Ten and Pac-12 Alliance Working Groups Complete Initial Series of Student-Athlete Focused Initiatives

The Atlantic Coast Conference (ACC), Big Ten Conference and Pac-12 Conference announced the completion of an initial series of student-athlete focused Alliance initiatives, which took place over the course of several weeks in November and December 2021. These initiatives included efforts in areas of civic engagement, student-athlete leadership and welfare; sustainability; social justice; diversity, equity, and inclusion; and mental health.

The initial round of Alliance initiatives was developed by nine working groups comprised of members of each of the three conferences. The working groups are tasked with the development of initiatives in connection with the three pillars of the Alliance: student-athlete support, the future evolution of college athletics, and scheduling.

[View This Article - ACC, Big Ten and Pac-12 Alliance Working Groups Complete Initial Series of Student-Athlete Focused Initiatives](#)

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## A Year That Has Changed How Athletes Think About Mental Health

After 2020 was a stressful year for everyone across the globe, 2021 represented a bright start. The COVID vaccine was becoming available, and while the pandemic hadn't ended, the world started to feel normal. And with fans returning to sports, it reflected the sense of possibility that the pandemic would end.

However, for various reasons, 2021 was not the end of the pandemic as we had hoped. The COVID death toll caught up, and eventually surpassed that of 2020.



The stress of the last 2 years has shined the light on the importance of mental health, and how more and more athletes are speaking out across all sports, from the NBA, to the NCAA to the NFL and more.

[View This Article - A Year That Has Changed How Athletes Think About Mental Health](#)

---

Gallagher Student Health & Special Risk | 500 Victory Road, Quincy, MA 02171

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[Constant Contact Data Notice](#)

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# Athletic Insurance Verification & Management



A secure, automated service that ensures all student-athletes are enrolled in valid health insurance coverage while participating in athletics at your institution.

## What Insurance Verification Will Do For Your Institution

1

### Reduce Liability

Ensures that student-athletes without comparable coverage will be identified and action to enroll them in adequate coverage can be taken.

2

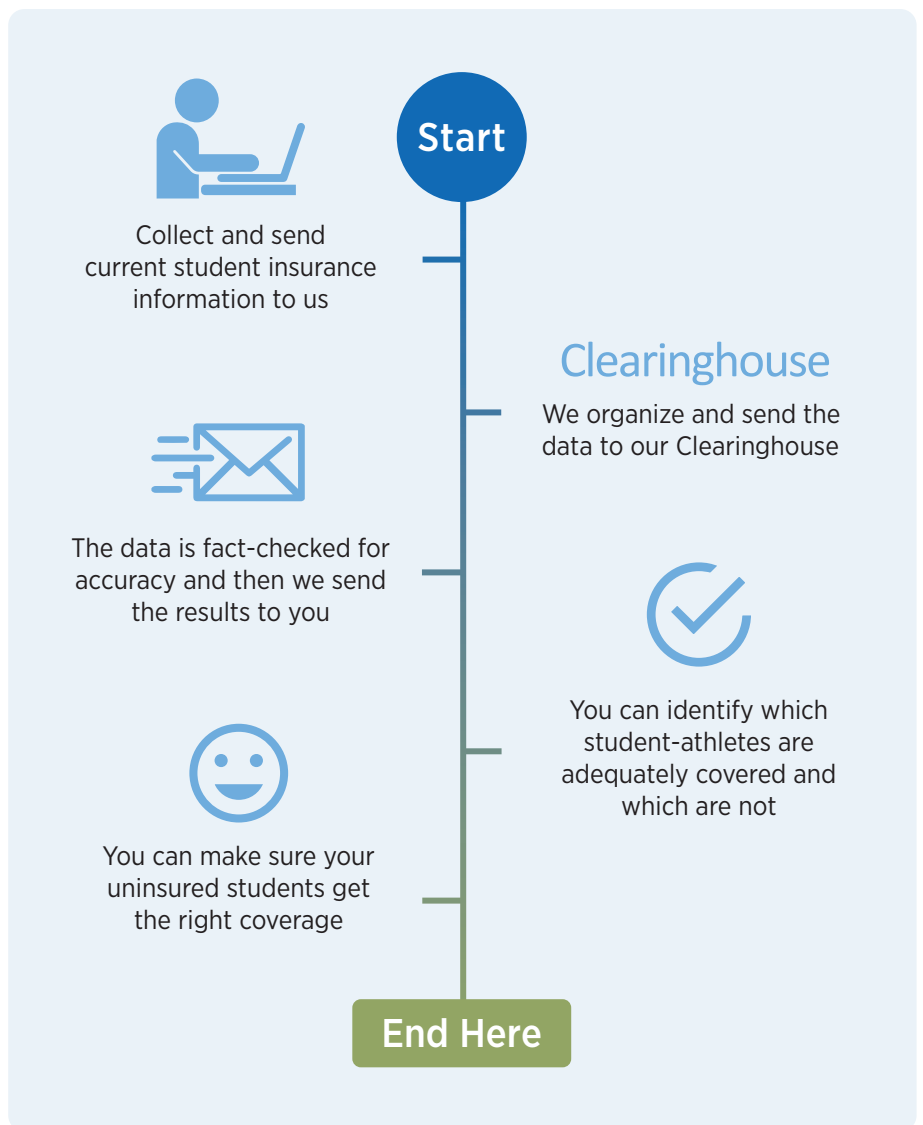
### Curb Claims

Prevents athletic insurance coverage from paying as primary coverage due to an uninsured student athlete's claim.

3

### Save Money

Reducing claims will lower the cost of future premiums. Identifying just one uninsured student-athlete could save thousands in future premiums.



# 2021-22 Basic Athletic Accident Insurance Benchmark Summary

NCAA DI Member Institutions

**CONFIDENTIAL**



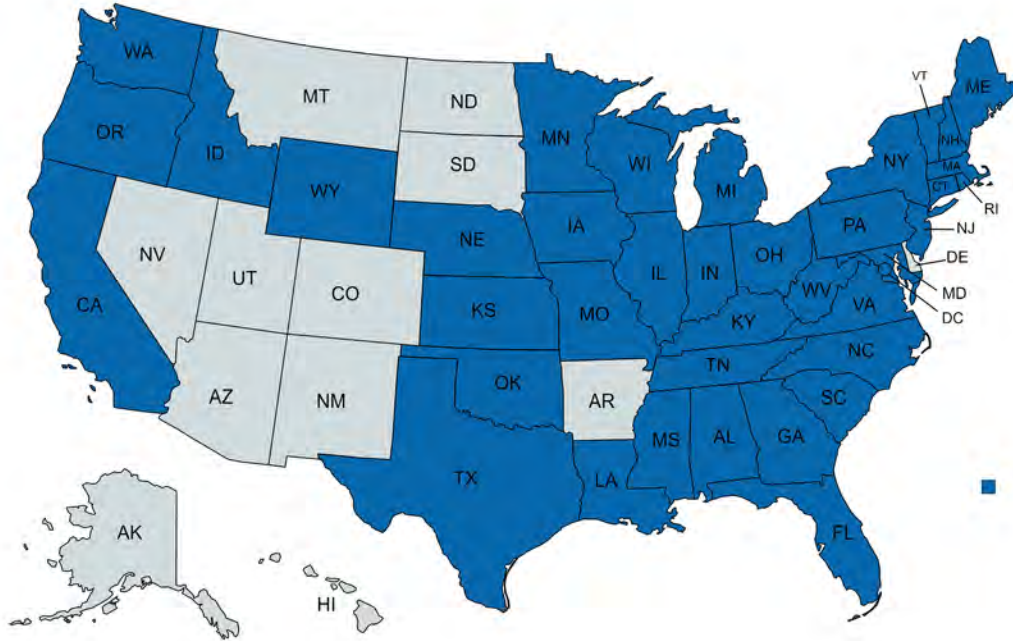
**Gallagher**

Insurance | Risk Management | Consulting

**CONSENT - BHR**



# Gallagher's Athletic Clients



## ATTACHMENT 1



Student Health &  
Special Risk

- 350 Colleges & Universities
- 39 States
- NCAA, NAIA, NJCAA, CCCAA, and USCAA
  - 55% are NCAA members
  - 75 NCAA Athletic Conferences



CONSENT - BAH

Credited with mapchart.net

TAB 3 Page 50

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## Important Considerations

- The majority of schools (over 90%) cover up to the NCAA Catastrophic policy deductible of \$90,000 per injury; the other 8% have an **Accident Medical Expense (AME) limit** of \$100,000, \$1,000,000 or \$5,000,000 per injury under this policy
- 75% of clients included in this benchmark sponsor a **football** program; it's nearly split in half between the two subdivisions (46% FBS and 54% FCS)
- 78% of clients included in this benchmark also cover **Prospective Student-Athletes** under their policy
- Since this coverage is secondary (excess) to a student-athlete's health insurance, the benefits for athletic injuries under the institution's **SHIP** (Student Health Insurance Plan) may contribute to the claims experience
  - Just over 70% have a SHIP, however, only half of those programs include coverage for ICS injuries
  - Just over a third of schools with a SHIP that excludes ICS injuries choose to enroll their international student-athletes into a separate ISS health insurance program with a limited ICS Benefit
  - For the remaining 30% of programs without a sponsored SHIP, the majority (over 70%) of those schools enroll their international student-athletes into an ISS program with a limited ICS benefit

# Basic Athletic Accident Insurance – NCAA DI

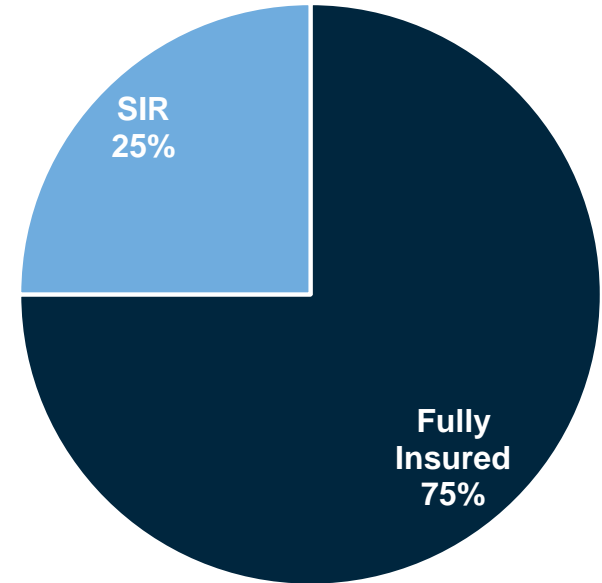
## Policy Type – *How Institutions Cover Medical Bills*

### Fully Insured Policy

- Institution purchases an insurance policy and pays an annual premium for coverage;
- Claims are funded by the insurance carrier and oftentimes processed by a Third Party Administrator (TPA)
- **Deductible:** institutions can implement a per injury deductible which is satisfied by primary insurance payments (coordinating deductible); many institutions implement a high deductible which is self-funded by the institution, and oftentimes administered by the program’s TPA

### Self Insured Retention (SIR) with an Aggregate Deductible and Stop Loss Policy

- School purchases a stop loss insurance policy;
- The insurance carriers sets an **Aggregate Deductible** on the stop loss policy which represents the total amount the institution would be responsible for self-funding in medical claims during a given policy year;
- Claims incurred beyond the aggregate deductible (or attachment point) are then paid by the insurance carrier

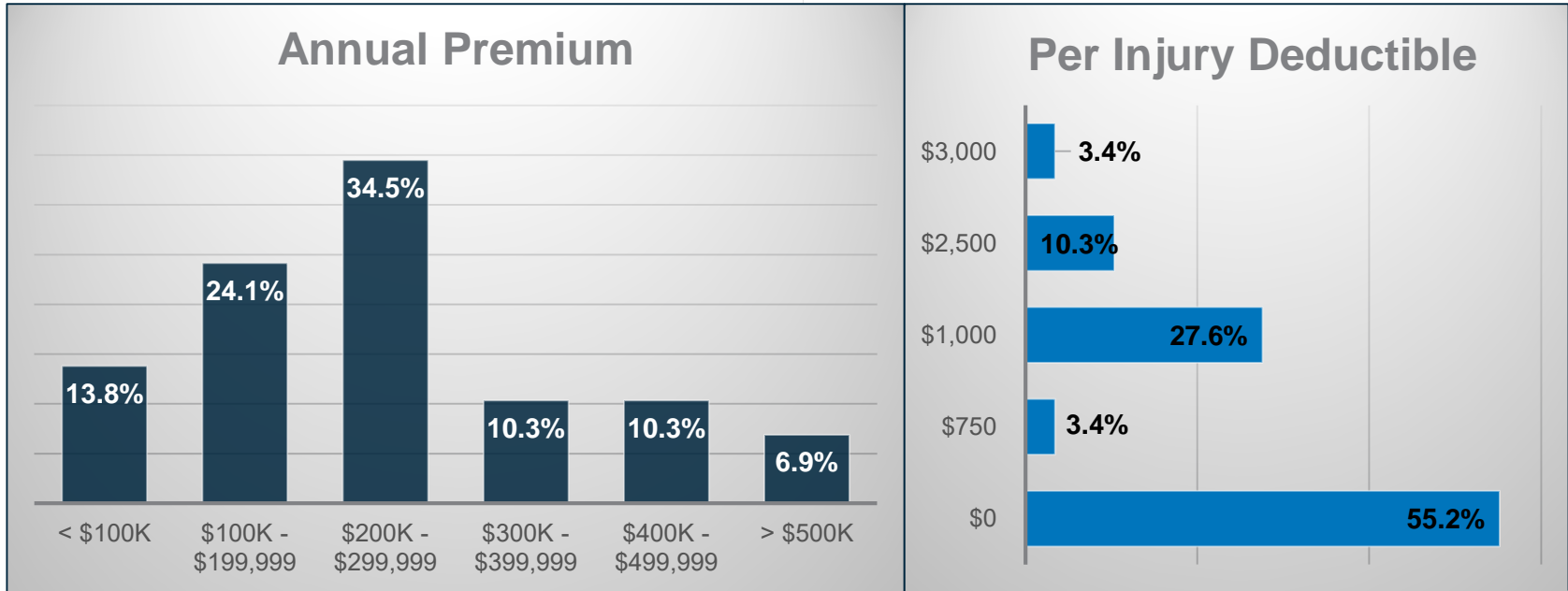




# Basic Athletic Accident Insurance – NCAA DI

ATTACHMENT 1

## Fully Insured Policies - *-\$0 or Low per Injury Deductibles*



1. Annual premium data shown above does not include the cost of self-funded claims for institutions with a deductible
2. Roughly two thirds of the institutions with a per injury deductible self-fund claims beneath that threshold, thus the premiums shown above are not indicative of the total cost to cover accident medical claims for intercollegiate

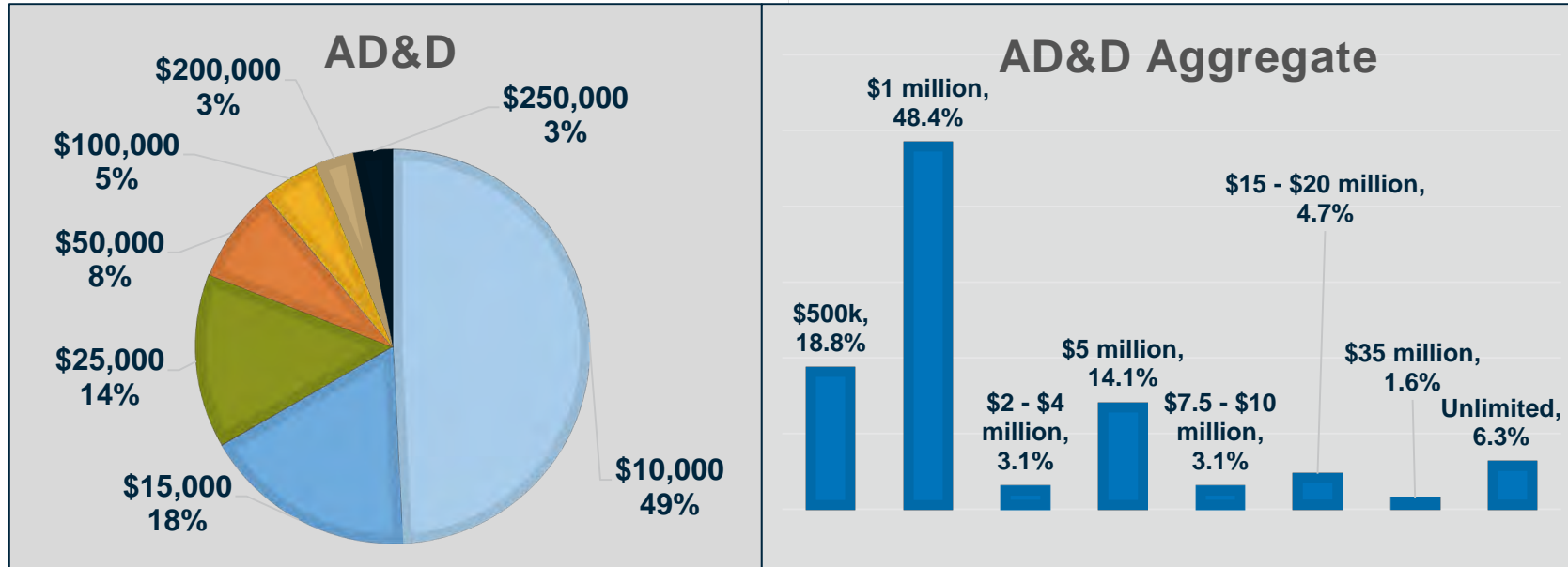
**CONSENT - BHR**

**TAB 3 Page 53**

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## Accidental Death & Dismemberment (AD&D)



# Athletic Accident Claims Summary Report

Paid Claims as of **10/31/2021**



**SCHOOL NAME**

CONSENT - BAHR



Student Health &  
Special Risk

# Commentary

- In our efforts to provide you with better information on how your athletic accident policy is trending, we would like to highlight the following information:
  - Claims for 2021-21 are considered to be immature at this point in time due to the 104 week benefit period and nature of secondary insurance
  - Football represents 25% of the total paid claims over the last six policy years
  - ABC Hospital is the top paid provider for each policy year

# Paid Claims Summary

## Athletic Insurance Premium & Paid Claims History

Insurance Company / TPA	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022
<b>Program Overview</b>						
Annual Premium	\$145,000	\$148,500	\$175,000	\$175,000	\$160,000	\$200,000
Total Paid Claims	\$130,941.68	\$183,541.90	\$190,616.38	\$136,427.25	\$43,764.35	\$22,334.23
Policy Loss Ratio	90%	124%	109%	78%	27%	11%
Number of Claimants	55	58	47	45	20	12
<b>High Dollar Claims Analysis</b> <i>(claimants with more than of \$10,000 paid)</i>						
Number of Claimants	0	1	1	1	0	0
Total Dollar Amount	\$ -	\$ 19,386	\$ 27,113	\$ 18,126	\$ -	\$ -
Percentage of Paid Claims	0%	11%	14%	13%	0%	0%

2019-2020: Original premium was \$200,000, however due to COVID-19 a refund of \$25,000 was issued for the cancelation of spring sports

2020-2021: Original premium was \$200,000, however due to COVID-19 a refund of \$40,000 was issued following a policy audit due to reduced exposure

2021-2022: Paid claims are far from complete at this point in time and consid

# Paid Claims Summary

## High Dollar Claimants

Claimants with more than \$10,000 Paid					
Policy Year	Sport	Diagnosis	Primary Insurance	Submitted Charges	Total Paid
2017-2018	Field Hockey	Nose	Aetna	\$57,419	<b>\$19,386</b>
2018-2019	Men's Lacrosse	Knee	BCBS	\$165,471	<b>\$27,113</b>
2019-2020	Women's Rugby	Knee	Medicaid	\$48,262	<b>\$18,126</b>

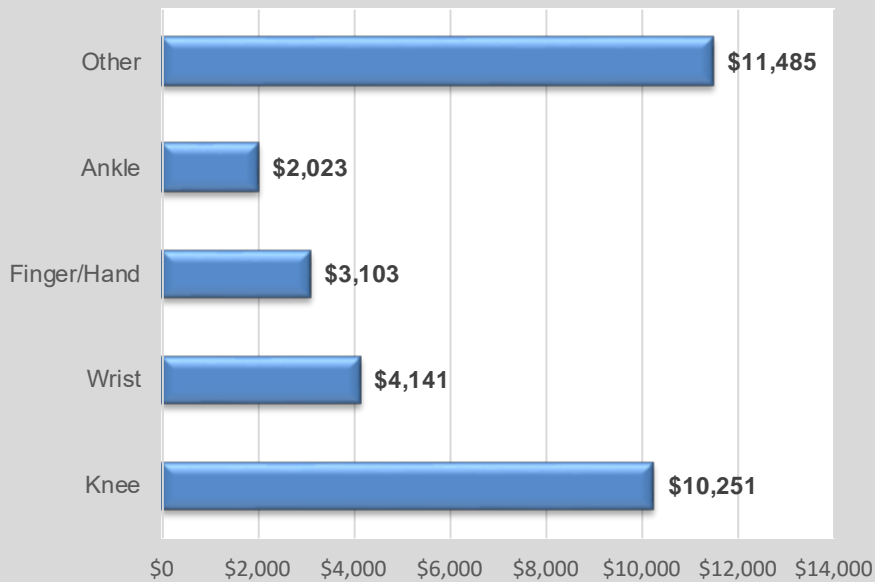
# Paid Claims Summary

## Triangle Report

Year Over Year Analysis - Point in Time							
Policy Year	10/31/2015	10/31/2016	10/31/2017	10/31/2018	10/31/2019	10/31/2020	10/31/2021
2015-16	\$ 15,369	\$ 69,887	\$ 97,858	\$ 99,858	\$ 101,528	\$ 101,528	\$ 101,528
2016-17		\$ 25,699	\$ 103,669	\$ 130,942	\$ 130,942	\$ 130,942	\$ 130,942
2017-18			\$ 45,228	\$ 145,669	\$ 179,885	\$ 183,542	\$ 183,542
2018-19				\$ 48,669	\$ 150,669	\$ 189,778	\$ 190,616
2019-20					\$ 26,998	\$ 75,569	\$ 136,427
2020-21						\$ 7,580	\$ 43,764
2021-22							\$ 22,334

# Paid Claims by Injury

2020-2021



2021-2022





# Paid Claims by Sport

Sport	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	TOTAL	% of Paid
Baseball	\$7,996	\$12,001	\$8,456	\$456	\$2,299	\$0	\$31,208	4%
Women's Basketball	\$5,469	\$8,669	\$13,559	\$13,441	\$4,299	\$0	\$45,437	6%
Men's Basketball	\$4,003	\$3,005	\$5,633	\$8,898	\$5,089	\$0	\$26,628	4%
Women's Cross Country	\$0	\$150	\$1,233	\$3,698	\$0	\$0	\$5,081	1%
Men's Cross Country	\$589	\$0	\$680	\$1,357	\$750	\$0	\$3,376	0%
Field Hockey <sup>1</sup>	\$9,987	\$6,003	\$4,511	\$9,001	\$335	\$2,123	\$31,960	5%
Football	\$45,996	\$62,004	\$68,999	\$58,996	\$12,001	\$10,986	\$258,982	37%
Women's Ice Hockey	\$8,004	\$5,469	\$9,899	\$10,563	\$2,307	\$0	\$36,242	5%
Men's Ice Hockey	\$16,996	\$12,693	\$15,663	\$12,330	\$5,630	\$0	\$63,312	9%
Women's Lacrosse	\$6,698	\$15,006	\$10,001	\$1,554	\$2,010	\$0	\$35,269	5%
Men's Lacrosse <sup>2</sup>	\$7,211	\$10,036	\$9,998	\$4,611	\$3,060	\$0	\$34,916	5%
Women's Soccer	\$6,333	\$23,658	\$18,996	\$1,258	\$250	\$3,306	\$53,801	8%
Men's Soccer	\$2,017	\$5,003	\$9,963	\$4,501	\$1,236	\$4,501	\$27,221	4%
Softball	\$3,698	\$9,874	\$4,569	\$1,478	\$1,547	\$0	\$21,166	3%
Women's Tennis	\$298	\$600	\$1,236	\$250	\$784	\$218	\$3,386	0%
Men's Tennis	\$1,103	\$1,478	\$450	\$1,535	\$0	\$0	\$4,566	1%
Women's Track/Field	\$630	\$3,500	\$4,002	\$1,140	\$2,000	\$0	\$11,272	2%
Women's Volleyball	\$1,914	\$1,207	\$500	\$363	\$0	\$1,200	\$5,184	1%
Men's Volleyball	\$2,000	\$3,186	\$2,268	\$997	\$167	\$0	\$8,618	1%
<b>TOTAL</b>	<b>\$130,942</b>	<b>\$183,542</b>	<b>\$190,616</b>	<b>\$136,427</b>	<b>\$43,764</b>	<b>\$22,334</b>	<b>\$707,625</b>	<b>100%</b>

# Paid Claims by Medical Providers

<b>2020-2021 Top 10 Providers</b>	Sum of Paid	Sum of Claims
CHILDRENS SPORTS MEDICINE	\$ 34,323	46
CHILDRENS HOSPITAL	\$ 26,167	13
CHILDREN'S HOSPITAL BOSTON	\$ 23,780	6
CHMC ANESTHESIA FOUND INCO	\$ 6,413	3
ATI PHYSICAL THERAPY MA	\$ 5,565	10
CHILDREN'S HOSPITAL RADIOLOGY	\$ 5,011	26
BOSTON BRACE INTERNATIONAL	\$ 4,428	11
LONGWOOD MRI SPECIALISTS, INC	\$ 3,012	12
BIOVENTUS, LLC	\$ 2,600	1
CHILDRENS HOSP PEDIATRIC	\$ 563	2
<b>All Other Providers</b>	<b>\$ 9,041</b>	<b>38</b>
<b>Grand Total</b>	<b>\$ 120,903</b>	<b>168</b>

<b>2021-22 Top 10 Providers</b>	Sum of Paid	Sum of Claims
CHILDRENS SPORTS MEDICINE	\$ 36,059	47
CHILDRENS HOSPITAL	\$ 27,431	11
CHILDREN'S HOSPITAL BOSTON	\$ 25,862	15
CHMC ANESTHESIA FOUND INCO	\$ 12,047	4
CHILDREN'S HOSPITAL RADIOLOGY	\$ 5,905	29
VARIOUS PROVIDERS	\$ 4,884	1
ATI PHYSICAL THERAPY MA	\$ 4,266	10
LONGWOOD MRI SPECIALISTS, INC	\$ 2,195	10
SERC REHABILITATION PARTNERS	\$ 1,599	1
PROFESSIONAL OCCUPATIONAL & PHYS*	\$ 1,045	1
<b>All Other Providers</b>	<b>\$ 13,179</b>	<b>\$ 53</b>
<b>Grand Total</b>	<b>\$ 134,472</b>	<b>\$ 182</b>

Dan Buckley, Division Senior Vice President  
500 Victory Road  
Quincy, MA 02171  
Dan\_Buckley@ajg.com  
gallagherstudent.com

Kelly Ethier, Vice President  
500 Victory Road  
Quincy, MA 02171  
Kelly\_Ethier@ajg.com  
gallagherstudent.com

## Gallagher at a glance

Gallagher has been designing solutions to meet our clients' unique needs for more than 90 years. We pioneered many of the innovations in risk management used by businesses in all industries today. We believe that the best environment for learning and growing is one that remembers the past and invents the future. Gallagher has divisions specializing in retail insurance brokerage operations, benefits and HR consulting, wholesale distributions and third-party administrations and claims processing.

As one of the largest insurance brokers in the world, Gallagher has approximately 700 offices in 33 countries and provides client-service capabilities in more than 150 countries around the world through our network of partners. Wherever you are – we're nearby.

# 4. Team Biographies

## Martha Murphy

### Senior Vice President, Student Health



#### Education/Credentials

- Bachelor of Science, Administration of Health Services  
Ithaca College, Ithaca, NY
- Master of Business Administration  
Babson College, Wellesley, MA
- America's Health Insurance Plans (AHIP)  
Executive Leadership Program Certification
- Licensed Insurance Producer – Accident & Health

#### Professional Experience

- Gallagher Student Health & Special Risk  
(formerly Gallagher Koster)
- Harvard Pilgrim Health Care
- Lahey Hospital and Medical Center

Martha joined Gallagher Student Health & Special Risk as Vice President of Student Health Sales, responsible for growth, retention and increasing value to our college and university clients throughout the country. Martha and her team of experienced professionals work closely with finance, risk managers, health services and student affairs in developing best-in-class solutions for managing on-campus student health insurance programs. Critical to our team's success, Martha maintains relationships with insurance carriers, claims administrators and other ancillary vendors to ensure our clients have access to the most comprehensive suite of student health products and services.

Prior to joining Gallagher Student Health, Martha worked for more than 20 years in employee benefits and held various sales and marketing leadership roles at Harvard Pilgrim Health Care, one of the nation's top ranked health plans. Martha managed multiple lines of business including national accounts, Medicare, individual products and student health. Martha worked closely with State and Federal agencies in the implementation of the Affordable Care Act (ACA) and the launch of the public marketplace and private exchanges.

Martha has a Bachelor of Science in Administration of Health Services from Ithaca College and her M.B.A. from Babson College.

## Lyndsay Paparo

### Account Executive



#### Education/Credentials

- University of Massachusetts, Boston
- Licensed Insurance Producer – Life
- Licensed Insurance Producer – Health and Accident

#### Professional Experience

- Gallagher Student Health & Special Risk (2018 – present)
- Blue Cross Blue Shield of Massachusetts (2016-2018)
- athenaHealth (2015-2016)
- Allways Health Partners, *formerly Neighborhood Health Plan* (2013-2015)
- Harvard Pilgrim Health Care (2010-2013)

Lyndsay initially joined the Gallagher Student Health team as a Consulting Support Specialist, providing project and account management services to our strategic clients nationwide. Now as an Account Executive, Lyndsay is responsible for managing student health insurance programs for current and prospective higher education accounts across the country. Lyndsay ensures all aspects of her client's programs are managed proactively and efficiently, and maintains strong relationships with insurance underwriters, claims administrators and other strategic partners. Lyndsay's industry expertise and 'customer comes first' approach ensures that she delivers the best solution and service to her clients and potential clients.

Prior to joining Gallagher Student Health, Lyndsay worked for several major health insurance carriers, including Blue Cross Blue Shield. Lyndsay is well versed in student health and employee insurance benefits including medical, dental and ancillary solutions. Lyndsay has held various client facing positions in sales, account management, product development, project management and customer service. Lyndsay has a Bachelor of Arts in English from the University of Massachusetts, Boston and is a licensed insurance producer.



## Kelly Ethier

### Assistant Vice President



#### Education/Credentials

- Bachelor of Arts, Sociology, Brandeis University (2012)
- Master of Arts, Sports Leadership, Northeastern University (2014)
- Licensed Accident & Health Producer (2014)

#### Professional Experience

- Gallagher Student Health & Special Risk (2014-Present)
- Wilbraham & Monson Academy (2013-2014)

#### Awards

- Higher Education 'Power Broker' Designation by Risk & Insurance Magazine (2019)

#### Affiliations

- University Risk Management and Insurance Association (URMIA)
- National Athletic Trainers' Association (NATA)

Kelly Ethier currently serves as the Assistant Vice President at Gallagher Student Health & Special Risk. Kelly began her career serving the Sports & Special Risk team as a Client Service Representative in the spring of 2014. During her first year with the company, she displayed an exceptional drive and the skills to take on increased roles and responsibilities, ranging from Account Management and the renewal of policies, to implementing new strategic procedures within the Sports & Special Risk Department.

Kelly quickly developed a comprehensive knowledge of this niche market, and was eagerly promoted to an Account Executive position in early 2016. Kelly continues to maintain regular contact with stakeholders, such as college and university staff, medical professionals, insurance carriers, parents and students. She educates and trains her clients on policy procedures and guidelines, while providing personalized attention to address any unique client need. Kelly has proven to be a valued resource and consultant to her clients.

Kelly graduated from Brandeis University with a Bachelor of Arts in Sociology. During her time there, she was not only an esteemed member of the Women's Basketball team (serving as a two-year captain), but was also a S.A.A.C. member, Relay for Life Coordinator and an Intramural Supervisor in the Athletics Department. After earning her undergraduate degree, Kelly completed her Master of Arts in Sports Leadership at Northeastern University. Kelly's background in athletics makes her well-versed in the unique insurance-related needs of collegiate-level athletic departments, and helps tailor her communication skills to the consultative audience of Gallagher Student's Sports & Special Risk practice.

## Dan Buckley Senior Vice President



### Education/Credentials

- Bachelor of Arts, Marketing & Finance  
Boston College
- Licensed Insurance Producer  
Property & Casualty (June 2004-Present)  
Accident & Health (May 2011-Present)  
Surplus Lines (November 2011-Present)

### Professional Experience

- Gallagher Student Health & Special Risk (2007-Present)
- Koster Insurance Agency (2001-2007)
- Keyport Life Insurance (2000-2001)
- John Hancock Insurance (1998-2000)

### Affiliations

- University Risk Management and Insurance Association (URMIA)
- National Athletic Trainers' Association (NATA)

Dan Buckley currently serves as the Senior Vice President at Gallagher Student Health & Special Risk, overseeing all of Gallagher Student's Sports & Special Risk accounts as well as assisting the Division President with strategic planning and growth for the company. Having previously served as Assistant Vice President and Senior Account Executive for Sports & Special Risk products, Dan remains dedicated to assisting his client schools in all aspects of their insurance programs including: policy renewal and general administration, and also works with his clients to train College and University personnel on the policy procedures and guidelines.

Competing as a Division I wrestler during college, Dan is well-versed in collegiate sports, sports injuries and sports insurance.

Since Dan joined Gallagher, the Sports & Special Risk department has grown from just over a dozen clients to more than 150 Sports & Special Risk Programs. Dan and his team work to streamline the claims process for his clients have made Gallagher an industry leader on all lines of sports & special risk insurance. Gallagher Student's Sports & Special Risk team prides itself on easing the administrative burden for their clients by taking over many of the "paperwork" processes that athletic trainers and Athletic Business Managers have previously had to do themselves. In this way, our Sports & Special Risk Department makes the administration of the sports & special risk policies as efficient as possible.



**Michele Montgomery CPCU, ARM-P, AINS**  
**Area Senior Vice President, Higher Education & Public Sector Practice**

The Gallagher team is led by Michele Montgomery. Michele will ensure the State of Idaho receives exceptional service and expertise from the Gallagher network. She will work hand-in-hand with other team members to ensure effective execution of the entire team.

**Relevant Experience**

Michele brings over 30 years of Property & Casualty experience including 18 years with Gallagher. Michele services the following clients:

- Florida College System Risk Management Consortium (27 Florida State Colleges)
- Florida State College at Jacksonville
- North East Florida Educational Consortium (13 Florida School Districts)
- Orange County Board of County Commissioners
- State of Idaho including four Universities and a State College

**Education, Licenses & Designations**

- Licensed 2-20 Property & Casualty Agent
- Licensed 1-20 Surplus Lines Agent
- Chartered Property Casualty Underwriter (CPCU)
- Association in Risk Management (ARM) Designation
- Risk Management for Public Entities (RMPE) Designation
- Associate in General Insurance (AINS)
- Bachelors of Science – Northern Illinois University

# 5. Sample Implementation Timeline

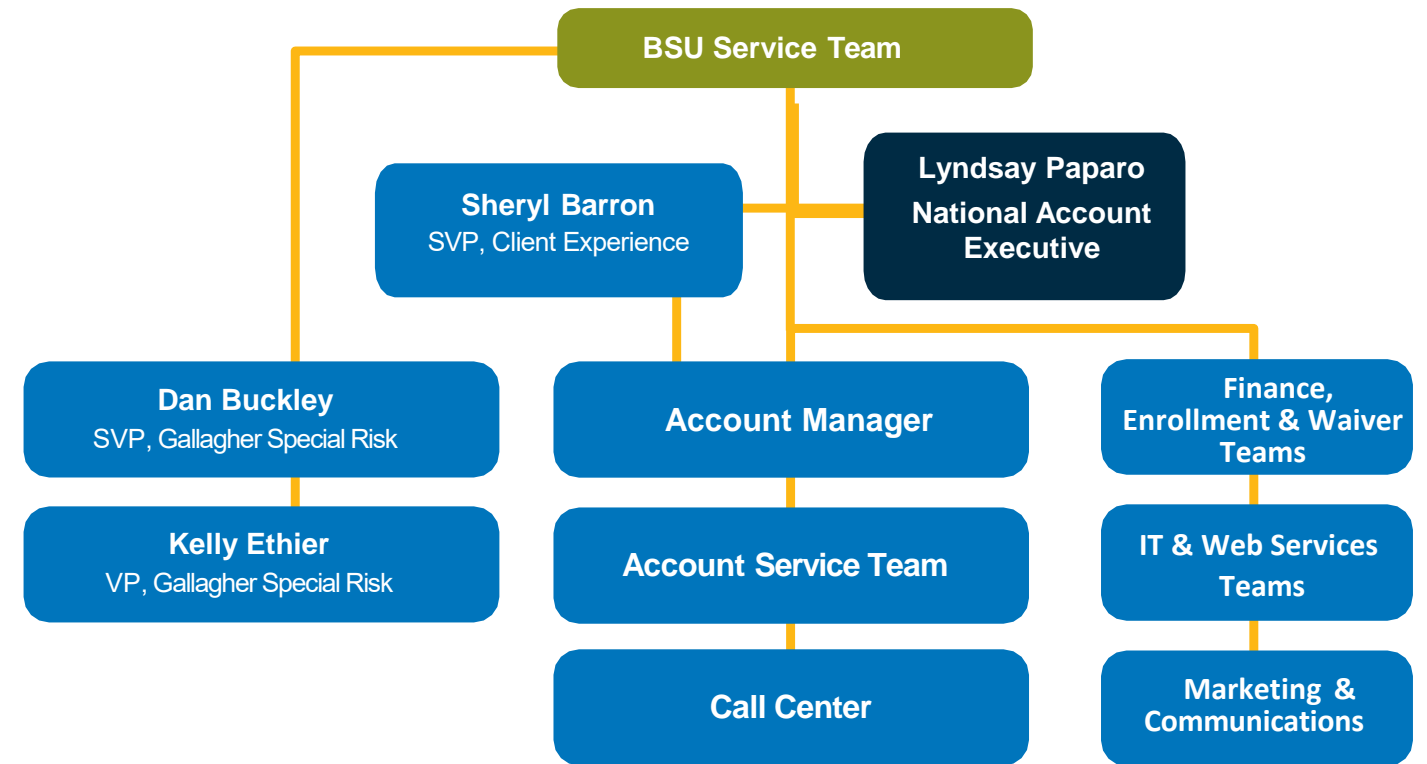
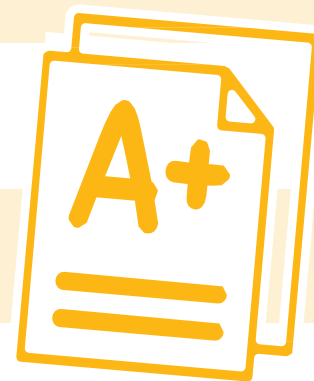
## Client satisfaction:

**98%** of clients are either Satisfied or Very Satisfied with us overall  
*Hey, that's pretty good!*

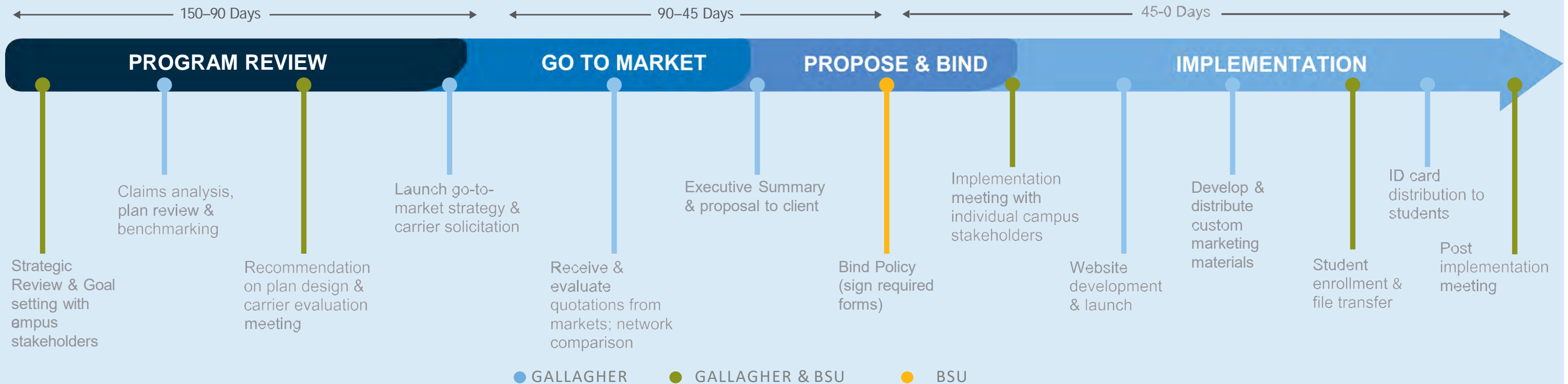
**100%** of clients are either Satisfied or Very Satisfied with Account Management  
*Even better!*

**97%** of clients are either Satisfied or Very Satisfied with Billing and Finance

**98%** of clients are either Satisfied or Very Satisfied with Enrollment and Waiver Management



### Gallagher BSU Experience Timeline



# Plan Implementation Schedule

Below is a sample of our standard implementation schedule for student health insurance plans. This schedule is modified based on a client's individual program and needs.

PROJECT/TASK	STAFF	DUE DATE	DESCRIPTION
<b>START-UP MEETING</b>			
<b>IMPLEMENTATION MEETING</b>			
<b>MARKETING COMMUNICATION</b>			
<b>TRAINING AND TESTING</b>			

<b>Project/Task</b>	<b>Staff</b>	<b>Description</b>
<b>POLICY YEAR ADMINISTRATION</b>		
Conference Call / Meeting	Senior Vice President (SVP), Vice President (VP), Account Manager (AM), and Client Service Manager (CSM)	Introduction between the Gallagher Sports & Special Risk team & the Boise State University stakeholders to communicate roles, responsibilities, and project timeline
Benchmark Analysis (ongoing)	VP, AM	Present client benchmarking summary (proprietary to Gallagher) with BSU to demonstrate costs and benefits that peer institutions provide for accident insurance coverage
Claims Advocacy (ongoing)	VP, AM, CSM, and TPA	Serving as a claims advocate for sports medicine staff when questions arise; providing expertise on benefits and coverage
Industry Updates (ongoing)	SVP, VP	Gallagher's team will share industry updates as they arise and also via our Quarterly Market Update Series e-mail campaign
Paid Claim Reports (ongoing; quarterly)	VP, AM, CSM	Share and review quarterly paid claim reports with the client. Review and highlight high dollar claimants, paid claims by medical provider, by sport, and by injury, etc. to assess and identify program trends
<b>RENEWAL PROCESS</b>		
Data Gathering (45 days prior to policy effective date for the next 2022-23 year)	VP, AM, CSM	Request updated exposure for each campus (athletic census with estimated participants and updated loss runs)
Pre-Renewal Call (45 days prior to policy effective date for the next 2022-23 year)	SVP, VP, AM	Strategize for upcoming renewal by discussing go to market strategy (carriers to approach, plan design options, etc.)
Go to Market (45 days prior to policy effective date for the next 2022-23 year)	VP	Review claims experience and communicate to underwriters program experience and request plan design options
Presentation of Renewal (30 days prior to policy effective date for the next 2022-23 year)	SVP, VP	Present renewal to client with recommendation on plan design and carrier
<b>POST-RENEWAL / IMPLEMENTATION</b>		
Claims Administration (within 30 days or less of binding coverage; prior to policy effective date)	VP, AM, CSM, and TPA	Introduction to TPA's dedicated claims examiner to review in detail the claims filing process
Insurance Coverage Summary	VP	After binding coverage Gallagher will provide a detailed coverage summary outlining policy effective date, limits, exclusions, annual premiums, and scope of coverage.
Master Policy Review (within 48 hours of receipt)	VP, AM	Review master policy for accuracy of all terms and conditions. Distribute master policy to client
Marketing Materials (within 30 days or less of binding coverage, at a minimum, 10 days prior to policy effective date)	CSM	Create and distribute Claims Filing Instructions, Digital Insurance ID Cards (Aerogami), FAQs, Brochures, etc. that are all fully customizable based on the college/university's preference
Claims Administration (within 30 days or less of binding coverage; prior to policy effective date)	VP, AM, CSM, and TPA	Introduction to TPA's dedicated claims examiner to discuss secondary claims process



## 6. Sample Marketing Materials

## Sample Email Campaigns



### See a Doctor Without Leaving Your Dorm!

Doctors are making house calls again! Included with your student insurance plan, and provided by HealthiestYou, is 24/7/365 access to board-certified physicians online or on the phone (where permitted). Totally worth it for minor stuff (like allergies, pink eye and earaches), the doctors on Telehealth can even send a prescription to your preferred pharmacy. The future is here!

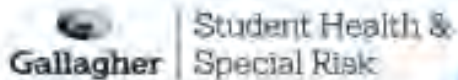
Telehealth can be a win/win:

- Talk to a licensed physician 24 hours a day, 7 days a week
- Pay no consultation fee
- Save money and time
- Toll free # is on your SR ID card or in **My Account** on the UHCSR website.

### Create your **My Account** today!

Access information about your coverage at your convenience, 24 hours a day, seven days a week at <https://www.uhcsr.com/school-page> and selecting SAMPLE SCHOOL. With *My Account* you'll have immediate access to view and print your ID cards and access to your claim history, including EOBs.

[HealthiestYou Flyer](#)



Dear *Student Name*,

Greetings from Gallagher Student Health, a valued partner of The Claremont Colleges. This email contains important information about your Health Insurance options.

The Claremont Colleges requires all Undergraduate and Graduate students who are half-time or greater, are required to be enrolled in the Student Health Insurance Plan, unless proof of active and comparable coverage is provided.

**All eligible students must submit an online Waive/Enrollment Form and elect to either enroll in or waive out of the Student Health Insurance Plan. If no form is submitted, you will be automatically enrolled.**

\*Highlights of the 2019-2020 Student Health Insurance Plan underwritten by Aetna Student Health:

- Fully compliant with the Affordable Care Act (ACA)
- Unlimited policy year maximum
- Annual deductibles: \$250 per insured person In-Network; \$600 Per Insured Person
- In-Network Physician's Office Visits covered at 100% after a \$25 copayment
- In-Network services generally covered at 80% preferred allowance
- Prescription drug coverage with low copayments: \$25 Tier 1, \$45 Tier 2 and \$60 Tier 3 while visiting an In-Network Pharmacy

\* The information provided above is used as a general summary of benefits. For a detailed plan description, limitations, and exclusions, visit our website.

**The deadline to submit a Spring form is January 13, 2020 and Forms cannot be submitted after the deadline.**

To learn more about the Student Health Insurance Plan, your school's insurance requirements and how to waive or enroll, go to [www.gallagherstudent.com/SAMPLE](http://www.gallagherstudent.com/SAMPLE). If you plan to waive, your current insurance must be fully compliant with the Affordable Care Act and provide access to doctors near your school. Please note, you should have your health insurance ID Card available.

Even if you waive, Voluntary Dental Insurance is available to all students on our website [www.gallagherstudent.com/dental](http://www.gallagherstudent.com/dental).

Sincerely,  
The Team at Gallagher Student Health & Special Risk



Dear *Student Name*:

Greetings from Gallagher Student Health, a valued partner of the Claremont Colleges. Welcome to the 2019-2020 Student Health Insurance Plan! This email is to confirm that you are enrolled in the plan effective January 1, 2020, and the premium has been charged to your student account. Your policy will expire on June 30, 2020.

ID cards will be available online through the Anthem Blue Cross app Store or Google Play. If you are in need of services before your ID card becomes available, online verification letters are accessible. You can use the verification whether you need to fill a prescription or make an appointment with an off-campus provider.

New and important information for the 2019-2020 Plan:

- The In-Network Coinsurance has changed from 90% to 80%.
- The combined In-Network and Out-of-Network Deductible has increased from \$150 per Insured, to \$300 per Insured.
- A Tier 4 Prescription Drug Copayment has been implemented at 20% Coinsurance for the Insured.
- The World Wide Travel Assistance Services Provider is now through GeoBlue.

Reminders about the Plan:

- ID cards are also available online through the Anthem Blue Cross app.
- Most services from off-campus providers require a referral from the Health Center. Please see brochure for details.

To download a verification letter:

1. Go to [www.gallagherstudent.com/SAMPLE](http://www.gallagherstudent.com/SAMPLE)
2. On the left, click "Account Home".
3. Log in (if you haven't already).
4. On the left, under "My Account".
5. Click "Verification Letter".

Voluntary Dental Insurance and other products are available to all students on our website [www.gallagherstudent.com/SAMPLE](http://www.gallagherstudent.com/SAMPLE) and clicking on the 'Dental Enrollment Form' link on the left.

On behalf of the entire Gallagher Student Health & Special Risk staff, welcome to the 2019-2020 Claremont Colleges Student Health Insurance Plan.

Sincerely,

The Team at Gallagher Student Health & Special Risk

# [Boise State ATTACHMENT 1 University Logo]

## 2022-2023 Student Health Insurance Plan

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It is important to have health insurance to protect you from unexpected medical expenses and cover you for routine exams and immunizations. Taking care of yourself and staying healthy contribute to your academic success. The Student Health Insurance Plan is designed with college students in mind, it is affordable and the benefits are tailored with you in mind.

### Benefits Designed For You:

- Low annual premium, cheaper than most plans or the deductible for many family plans
- Minimizes your out-of-pocket costs - low deductibles, copayments and coinsurance
- Covers preventive care services at 100% (In-Network Only)
- Access to doctors close to school and across the country
- Includes Worldwide Travel Assistance Services
- Prescription pick-up at a local retail pharmacy or through mail order pharmacy
- Coordination with the on-campus Student Health Center

### Added Programs and Services

- Telehealth services for medical and behavioral health
- Dental and Vision discount programs
- SilverCloud, online behavioral health program

### And More

- Dental and Vision Insurance available for all students
- Personal Property Insurance
- Tuition Reimbursement

*More information about the Student Health Insurance Plan (full benefits, exclusions and limitations) and other available programs and services, please visit [www.gallagherstudent.com/\[SchoolURL\]](http://www.gallagherstudent.com/[SchoolURL])*

[ADD SCHOOL SPECIFIC ELIGIBILITY STATEMENT]

See reverse side for enrollment/waiver instructions

It is Time to Make a Decision! Go to [www.gallagherstudent.com/\[SchoolURL\]](http://www.gallagherstudent.com/[SchoolURL]) to submit your [type of form]

**Deadline: August 1, 2021**

**ATTACHMENT 1**

[ADD SCHOOL SPECIFIC ELIGIBILITY STATEMENT]

To waive, your current plan must cover you in the area of your school and be fully compliant with the Affordable Care Act. Waivers will not be accepted for out-of-state Medicaid plans, out-of-state regional HMOs, international plans, travel plans, short-term medical plans or Christian Ministry plans. **International Students are enrolled on a Mandatory basis.**

**Online Enrollment/Waiver/Decision Process-** To enroll or waive the Student Health Insurance Plan:

1. Go to [www.gallagherstudent.com/\[SchoolURL\]](http://www.gallagherstudent.com/[SchoolURL])
2. Login and Select the ["I want to Enroll/Waive"] button
3. You waiver form is sent through a verification process and you will receive an email notifying you of the approval or denial of your waiver request.

Note: you will need information from your current health insurance ID card if you are submitting a waiver.

**Questions?** Contact Gallagher Student Health toll free at [school dedicated phone number] or visit our website and click the 'Customer Service' link.

**Boise State University (with Logo)**

**2022-2023 Student Health  
Insurance Plan (SHIP)**

# **Frequently Asked Questions**



## Log in

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. On the top right corner of the screen, click "Student Login".
3. Follow the login instructions.

## Enroll

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. On the left toolbar, click "Student Waive/Enroll".
3. Log in (if you haven't already) by following the instructions on the website.
4. Click the "I want to Enroll/Waive" button.
5. Follow the instructions to complete the form.
6. Save a copy of your reference number.

## Enroll for Voluntary Student offerings

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. On the left toolbar, click "Student Direct Pay Enroll".
3. Log in (if you have not already) by following the instructions on the website.
4. Follow the instructions to complete the form and submit payment.
5. Save a copy of your reference number.

## Enroll my dependents

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. On the left toolbar, click "Dependent Enroll".
3. Log in (if you have not already) by following the instructions on the website.
4. Follow the instructions to complete the form and submit payment.
5. Save a copy of your reference number.

## Waive

If your current insurance plan is comparable to the SHIP:

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. On the toolbar, click "Student Waive/Enroll".

3. Log in by following the instructions on the website (if you have not already).
4. Click the “I want to **Enroll/Waive**” button.
5. Follow the instructions to complete the form.
6. Save a copy of your reference number. This number only confirms submission, not approval of your form.

### Edit my Form after it's submitted

If it is before the waiver/enrollment deadline:

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. Log in (if you have not already) by following the instructions on the website.
3. On the left, click “View My Submitted Forms”.
4. Select the form you want to edit.
5. Update the forms as needed.
6. Click “Submit Edit.”

### Obtain an ID card

1. Go to [https:// \(Carrier Link\)](https://(Carrier Link))
2. Input QXH follow by your claim ID number as Member ID (e.g. QXH123456789)
3. Input your Date of Birth and click “Continue”

Gallagher Student Health & Special Risk has received your enrollment information from your school.

If you need a replacement ID card, request one by logging onto [Carrier Name] or by calling 1- 800-xxx-xxxx.

### Obtain a tax form

If the federal government requires reporting of health insurance coverage for 2020, tax forms will be mailed to the address on file by either the Insurance Carrier or the Claims Administrator. Please refer to the Important Contact Information Section of this document for further information.

### Print a Verification Letter

Verification Letters are usually available 5-7 business days after your eligibility is confirmed.

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).

2. On the left toolbar, click “Account Home”.
3. Log in by following the instructions on the website (if you haven’t already).
4. You will be redirected to the “Account Home” page, then click on “Verification Letter” under “Coverage History.”

### View my account information

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. Log in by following the instructions on the website (if you haven’t already).
3. You will be redirected to the “Account Home” page where you can see your current coverage, claims ID number (if applicable), and contact information.

### Change my address

1. Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl).
2. On the left toolbar, click “Customer Service”.
3. Under the “Choose Help Topic” dropdown, select “Address Change”.
4. Complete the required fields.
5. Click “Submit”.

Make sure you also notify your school of your address change.

### Find a Doctor

Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl) and click on “Find a Doctor”.

### Find a Participating Pharmacy

Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl) and click on “Pharmacy Program”.

## Insurance Plan Benefits

### What benefits does your SHIP provide?

Your SHIP is fully compliant with the Affordable Care Act (ACA) and all other federal and state mandates. It pays for a variety of medical services, including hospital room and board, inpatient and outpatient surgical procedures, labs and x-rays, chemotherapy and radiation, inpatient and outpatient mental health services, physician office visits, consultant visits, ambulance, emergency care and prescription drugs. It also covers intercollegiate sports injuries the same as any other Injury.

It covers preventive care services at no cost when you use in-network providers. This includes routine physicals and examinations, screenings, GYN examinations, and most immunizations.

**It pays for X% of your medical fees when you use in-network providers.** This is the advantage to using in-network providers. When you use out-of-network providers the coinsurance is less which means your potential out-of-pocket costs are more. There may be copayments and deductibles you’ll be responsible for paying.

### Need more information about your plan?

Go to [www.gallagherstudent.com/schoolurl](http://www.gallagherstudent.com/schoolurl)

### What changes have been made to the Plan for the 2021-22 Policy Year?

- List out plan changes
- List out Gallagher relationship with Carefirst and the University
- List out new rates
- List out new features of student health center delivery

### Other features of your SHIP:

- It has a [\$\$\$] [per policy] or [per accident/injury and sickness] deductible for in-network medical services. or [It has no deductible for in-network medical services].
- It has a [\$\$\$] [per policy] or [per accident/injury and sickness] deductible [for out-of-network medical services or [It has a combined In-Network and Out-of-Network deductible of [\$\$\$] for every year you are in the plan.]
- For prescription drugs from participating pharmacies, you will pay:
  - a [\$10] copay for a 30-day supply of a [generic/Tier-1 drug]
  - a [\$25] copay for a 30-day supply of a [preferred brand name/Tier-2 drug],
  - a [\$45] copay for a 30-day supply of a [non-preferred brand name/Tier-3 drug].
- Note: in some cases, your doctor must get permission from the insurance company before prescribing a drug. You can see which drugs require preapproval by visiting your school's page at [www.gallagherstudent.com](http://www.gallagherstudent.com).

### Does your plan include dental and/or vision benefits?

If you're 19 or younger, you can get preventive dental and vision benefits with this plan. The same holds true for your enrolled eligible dependents as long as they are 19 or younger. For details, refer to your SHIP brochure or certificate.

### More information about your dental and vision options

To enroll in a voluntary dental plan (additional cost), go to [www.gallagherstudent.com/dental](http://www.gallagherstudent.com/dental). A vision option is also available. The types of plans and availability of plans vary by state.

To enroll in a voluntary dental plan or vision plan (additional cost), go to [www.gallagherstudent.com/dental](http://www.gallagherstudent.com/dental) or [www.gallagherstudent.com/vision](http://www.gallagherstudent.com/vision). The types of plans and availability of plans vary by state.

### How much does the SHIP cost?

	Name of Coverage Period (xx/xx/xxxx-xx/xx/xxxx)	Name of Coverage Period (xx/xx/xxxx-xx/xx/xxxx)	Name of Coverage Period (xx/xx/xxxx-xx/xx/xxxx)
Enrollment/Waiver Deadline	Month Day, Year	Month Day, Year	Month Day, Year
Student			
Spouse/Domestic Partner*			
Each Child*			
All Children*			

## Do I need a referral from my school's Health Services to see an off-campus health provider?

[Varies by school – select applicable text below]

No, you do not need a referral. However, seeking care or advice first from [Health Services] is a good idea, since they can connect you with valuable on-campus services or refer you to providers they know off-campus. For more information, visit your school's Health Services website [Insert health services website].

**OR**

Yes, you need a referral before you see an off-campus provider. Without one, your health benefits could be denied [or reduced]. To see how referrals work, check out your SHIP brochure.

## Am I still covered if I live off campus or I am traveling or studying abroad?

Yes, your plan covers you wherever you are - during semester breaks and summer vacation. This is true even if you are traveling or studying abroad. As long as you are enrolled in SHIP and you paid your premiums, You will be covered.

## More information about off-campus, travel and study abroad

In addition to being covered for medical treatment and services, your plan also offers 24-hour Worldwide Travel Assistance that includes services ranging from a lost passport to helping with emergency medical assistance or arranging for emergency medical evacuation or repatriation of remains. It is important to contact Chubb to arrange for you, so contact them before making arrangements on your own. If you do not contact them first, these services will not be covered.

Other information about seeking medical care abroad:

- Always keep your SHIP ID card with you.
- Save a copy of the plan brochure and/or bookmark your student health website.
- If you get sick while abroad, you will likely need to pay for your care first and then need submit bills for reimbursement. Your covered expenses will likely be considered an out-of-network expense.
- Before you submit claims for reimbursement, have the itemized bill(s) translated into English. Also, include a letter informing the claims administrator you already paid for the healthcare service and need to be reimbursed.
- Write your name, ID number, address, and school name are on your bill(s). This will help the claims company process your reimbursement request correctly and promptly.

## Does my plan still cover me after I graduate?

Yes. You will be covered under your SHIP until the end of the policy period for which you are enrolled and have paid your premium. If you enrolled and paid for annual or spring/summer coverage and graduate in the spring, you will be covered until the end of the policy year.

## Eligibility, Enrollment & Waiving

### Am I eligible for student health insurance?

[Insert individual student group's specific eligibility information here (i.e. –domestic, international, undergrad, graduate, Medical Leave of Absence (MLOA), etc.). If more than one group, use a new bullet for each group you are defining.] You must actively attend classes for at least the first 31 days after your policy begins. Home study, correspondence, and online courses do not fulfill this requirement. [Please revise according to Stevens Institute rules/ requirement]

## Can I enroll my eligible dependents?

Yes, you can enroll your eligible dependent(s) by going to [www.gallagherstudent.com](http://www.gallagherstudent.com) and clicking on "Dependent Enroll".

[This language should be updated accordingly for Stevens if the process is an exception to this rule].

Note: You must purchase dependent insurance for the same time period as your own coverage. It can't be for a longer or shorter period than your own. For example, if you enroll for annual coverage, you can't limit your dependent's insurance to only the spring semester unless a qualifying event occurs. [This language will be updated for Stevens if necessary].

## Qualifying events for enrolling your dependents

You can add eligible dependent(s) if one of these qualifying events occurs:

- You get married
- You have a child
- You get divorced
- Your dependent enters the country for the first time
- Your dependent loses coverage under another insurance plan

In such cases, you must submit a Dependent Petition to Add Form, supporting documentation, and payment to Gallagher Student Health & Special Risk within **31 days** of the event. If approved, your coverage will start on the date of the qualifying event.

Note: Your premium is prorated. Once your dependent is enrolled, you cannot terminate coverage unless you lose your Student Health Insurance eligibility.

## What should I know before waiving coverage?

Before waiving coverage, review your current policy and then consider these questions:

- Does your plan comply with the Affordable Care Act? (See the FAQ, "What do you mean by 'comparable coverage'?")
- Will your current plan cover medical care beyond emergency services (i.e. doctor's office visits, diagnostic testing, x-rays, prescription drugs, mental health, etc.) on- and off-campus?
- Does your plan have doctors and hospitals near campus?
- If you plan to travel elsewhere during the course of the year, does your coverage also extend to these areas?
- Is the annual cost of your SHIP less expensive than the cost of being added as a dependent to your parents' plan? Be sure to compare deductibles and total out-of-pocket costs, not just the annual premium.
- Does your current plan call for administrative pre-requirements, pre-certification, or primary-care physician referrals? Keep in mind that physician referrals may delay your access to treatment.

## More information about waiving coverage

- Are you an international student? If so, you will not be able to waive coverage. [please revise according to client]

- If you do not complete a [decision/waiver/enrollment] form by the published deadline, you will be automatically enrolled in and billed for your SHIP.
- Once you meet eligibility, you are enrolled for the remainder of the policy and can't waive later in the year. [please revise according to STEVENS INSTITUTE rules]
- If you decide to waive coverage, you will not have another opportunity to enroll in SHIP until the following plan year unless you experience a qualifying event. [or] If you decide to waive coverage, you won't be able to sign up until the next open enrollment period [revise according to STEVENS INSTITUTE rule]
- You should submit an online decision form, whether enrolling or waiving. [this is only applicable if STEVENS INSTITUTE has the enroll option, otherwise remove this bullet point]

### What do you mean by “comparable coverage”?

If you decide to opt out of your SHIP, you must be insured by a plan that provides comparable coverage. This means it must comply with the Affordable Care Act (ACA) and meet or exceed the benefits provided through the SHIP. Your plan must have participating providers and cover a range of services in and around the geographic area where you attend school. Services should include, but are not limited to:

- Preventive and non-urgent care
- Emergency care
- Surgical care
- Inpatient and outpatient hospitalization
- Lab work
- Diagnostic x-rays
- Physical therapy
- Chiropractic care
- Prescription drugs
- Mental health and substance abuse treatment

### More information about “comparable coverage”

If your current plan is an HMO, your coverage will likely be limited—or not available—outside of your HMO's service area. As a result, it probably won't be considered a “comparable” plan.

Confused about waiving your SHIP coverage? Before deciding what to do, compare your current health insurance plan to your SHIP coverage. Consider your possible out-of-pocket costs – deductibles, copays, coinsurance and out-of-pocket maximums. You may find your current plan's out-of-pocket costs to be higher than what you'll pay for SHIP. Moving to your SHIP may well be financially beneficial.

Non-comparable health plans include:

- Those that only provide emergency services
- International plans (includes plans not filed in the US)
- Travel insurance plans
- Health care sharing plans



- Out-of-state Medicaid plans
- Plans from insurance companies not located within the United States
- Prescription discount plans

### Will you audit or verify my waiver request?

[Use this text if STEVENS INSTITUTE is using the waiver verification process. Delete this question and answer if the school is not using the audit process]

Yes, we may audit or verify your request. This is to make sure your insurance plan will cover you when you are at school.

### More information about our waiver review process

Here is how our waiver review process works:

- We check the insurance company information you entered on your form to make sure it is accurate and that your coverage is active.
- We verify most waiver requests within 24 to 48 hours.
- Once we verify your coverage, we will let you know whether we approved your waiver via an email to the address you provided on your form. If we deny your request, we will tell you why. We will also guide you should you wish to revise and resubmit your form and supporting documentation.
- Our waiver verification process is new this year. As a result, it is possible we will no longer accept your prior waiver (and submitted insurance).

[Only include this statement for schools that are new to the waiver verification process].

### If I waive, but then lose coverage, can I enroll in SHIP?

Yes, if you waive and then lose coverage under that plan (called a qualifying event), you may submit a Petition to Add request. The form can be found on your school's page at [www.gallagerstudent.com](http://www.gallagerstudent.com). Make sure you read the form carefully as it contains very specific information on the Petition to Add process.

If your enrollment in SHIP is on a voluntary basis, there is no option to Petition to Add if you lose coverage with your current health insurance plan. If you missed the enrollment deadline, you will need to wait until the next open enrollment period.

### How do recent changes to the Affordable Care Act affect my SHIP?

Your SHIP fully complies with the Affordable Care Act (ACA). Being ACA compliant means your plan offers essential health benefits that includes certain preventive services such as annual physical and gynecology exams and some immunizations. It also covers pre-existing conditions without any waiting period.

There is no longer a federal tax penalty for not having health insurance, but the mandate to have health insurance remains. There are some states that have kept a state tax penalty for not having health insurance as well as having additional insurance requirements.

If you are under the age of 26, you may be eligible to enroll as a dependent on your family's employer/group health insurance plan. Contact that plan for more information.

### May I use one of my state's marketplace health insurance plans to waive my SHIP?

If you live in the state where you are attending school and bought insurance through your state's marketplace, you may be able to waive your SHIP. Please review these plans carefully. Many of them will have a deductible greater than that of your SHIP. This will increase your out-of-pocket costs. Also, many of these plans are HMOs with restrictive provider networks. Look at its provider network to be sure that you will have in-network providers near your campus.

### More information about buying health insurance through your state's or the federal marketplace

Are you an international student? If so, then purchasing a subsidized marketplace plan may jeopardize your visa status. [Revise if International students are handled differently by STEVENS INSTITUTE due to RFP goals to consider allowing them to waive going forward]

### Once I am enrolled in the SHIP, can I cancel it? Can I get a refund?

In some cases, you can cancel your SHIP and receive a refund.

Once you are enrolled in SHIP, you will remain enrolled in it for that coverage period. You have no option to terminate it unless you enter the armed forces. In that case, we will refund a pro-rated share of your premium.

## Plan Enhancements

### How to enhance your Student Health Insurance Plan

[Delete this question and answer if there are no Complements offered to the applicable school]

You can enhance your SHIP by accessing several products available exclusively from Gallagher Student Health & Special Risk. They include:

- Basix Dental Savings Program—provides an exclusive discount arrangement, which can save you 20% to 50% off the cost of dental care.
- EyeMed Vision Care Program—allows you to receive discounted services at participating EyeMed providers.

[Delete this section if SilverCloud is not offered to the applicable school]

Gallagher Student Health now gives you access to SilverCloud, an online behavioral health platform that provides behavioral health care and support for enrolled students. The platform delivers clinically proven, evidenced-based content, programs, and support for depression, anxiety, and stress. Go to <https://gsh.silvercloudhealth.com/signup/> to signup today.

To learn more about your plan enhancements, visit [www.gallagherstudent.com](http://www.gallagherstudent.com). Select your school's page and then click on the "Discounts and Wellness" link.

### What other types of insurance are available?

Personal property and renters Insurance is available to students on- or off-campus, at home, or abroad. It covers damage or theft to laptops, cell phones, books, electronics, and much more. For details, go to [www.gallagherstudent.com/property](http://www.gallagherstudent.com/property).

Please visit [www.gallagherstudent.com](http://www.gallagherstudent.com), select your school's page, and click on the "Other Insurance Products" link for complete details about additional insurance products and how to enroll.

**Important Contact Information**

Make sure phone numbers are all provided in the same format [1-XXX-XXX-XXXX]

Answer Needed	Who To Contact	Contact Information
Enrollment, coverage, or ID cards	Gallagher Student Health & Special Risk	500 Victory Road Quincy, MA 02171 Website: w ww.gallagherstudent.com/schoolurl, click the 'Customer Service' link
Benefits, claims, and claims payments incurred on or after [effective date of policy] (If applicable)	Name of Claims/Insurance Company	Address: City, State, Zip: Phone: Email: Website:
Claims and claims payment incurred prior to [effective date of policy] If applicable. Delete entire row if claims company has not changed	Name of Claims Company	Address: City, State, Zip:
Preferred providers	Name of Provider Network	Phone: [Provider Network Phone Number] Website: w ww.gallagherstudent.com/schoolurl, click "Find a Doctor"
Participating pharmacies	Name of Pharmacy Network	Phone: [Provider Network Phone Number] Website: w ww.gallagherstudent.com/schoolurl, click "Pharmacy Program"
Tax forms Varies by carrier/TPA. If you are not sure who sends them, please check with a team member	Name of Insurance Carrier/Claims Company	Address: City, State, Zip: Phone: Email: Website:
Voluntary Dental Change or remove if school does not have this option	Name of Dental Provider	Phone:

Answer Needed	Who To Contact	Contact Information
Gallagher Student Health Plan Enhancements If applicable	EyeMed (Discount Vision), Basix (Dental Savings) SilverCloud (digital mental health)	EyeMed Phone: 1-866-839-3633 Website: w ww.enrollwitheyemed.com Basix Phone: 1-888-274-9961 Websites: w ww.basixstudent.com SilverCloud <a href="https://qsh.silvercloudhealth.com/signup/">https://qsh.silvercloudhealth.com/signup/</a>
Worldwide assistance services (medical evacuation and repatriation)	Name of Travel Assistance Provider	Toll-free within the United States: [phone number]  Collect from outside of the United States:

**ATTACHMENT 1**

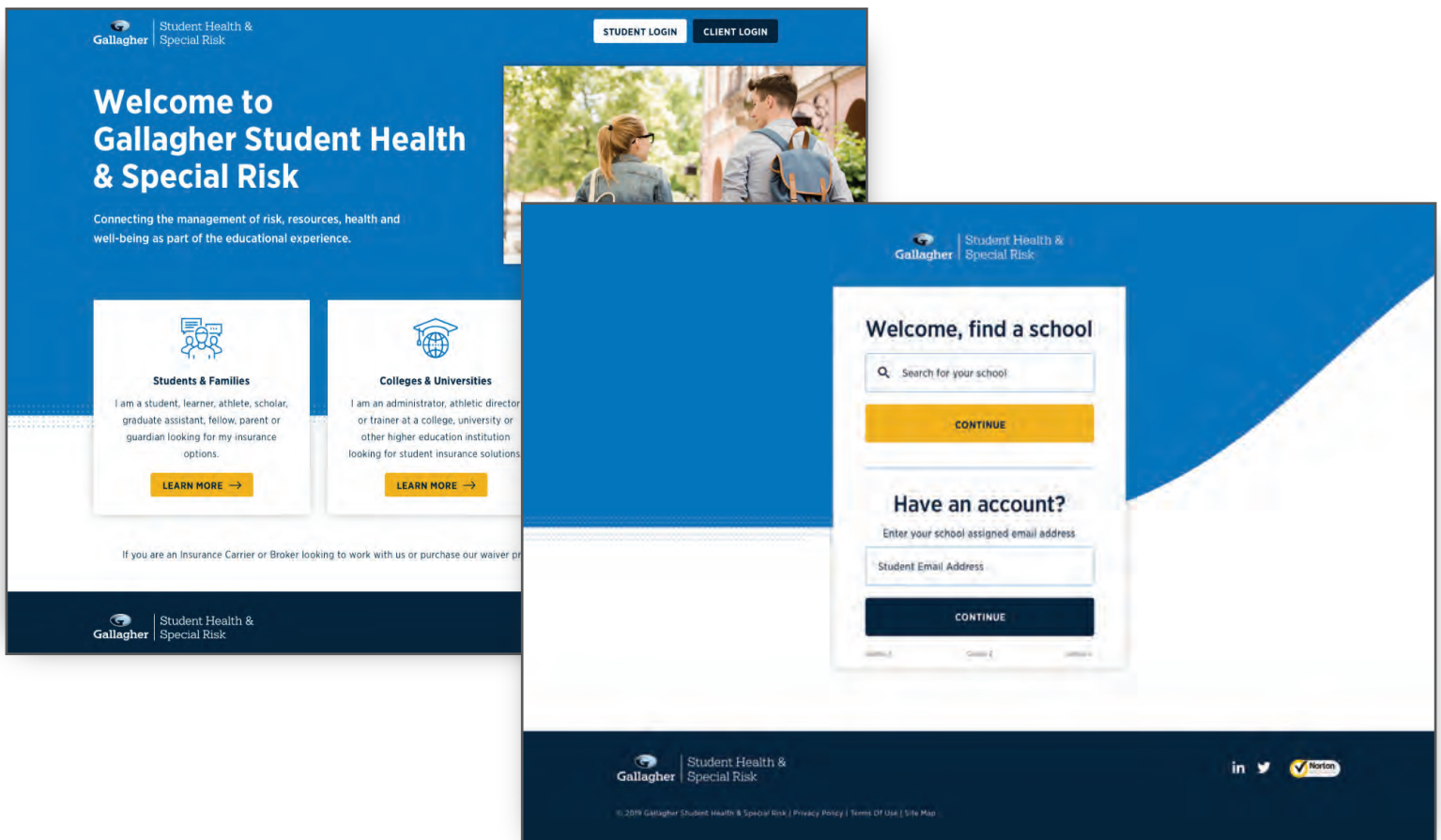
		[phone number] Email: [specific email address]
Assistance programs	24/7 Nurseline or Collegiate Assistance Program	
Telehealth services	Name of Telehealth	Phone: [specific phone number] Website:
Any other school specific information should be put in these row s.	If there is nothing to add, delete the empty row s.	

# 7. Overview of Website Services & Capabilities

# Overview of Website Services and Capabilities for Students



GallagherStudent.com provides easy online access to information about the student insurance program for both students and clients. School pages are customizable to meet the needs and interests of each specific institution. The Gallagher Student website is compliant with the most recent security standards and is HIPAA-compliant.



Students self-select who they are from our homepage and depending on which login process the school elects: Single Sign On or Pre-pop, students will either land on their student dashboard or finish logging in, respectively.

Students and users who navigate to their school dashboard but have not logged in yet are still able to view the Student Health Insurance Plan highlights and detailed benefits.



Once a student is logged in, their dashboard makes it easy to view insurance benefits and options available to them. A student can enroll, waive, add dependents, find a doctor, learn about claims and much more... all in this one place.

## Dashboard Features


- ✓ Improved user journey - students know exactly what to do
- ✓ Coverage, Important Deadlines and Messages are right up front so they can't be missed
- ✓ "I Want To" function to show all available actions for that students' eligibility
- ✓ All plan information is located in the same section
- ✓ Search bar function to find answers to relevant questions
- ✓ Help Center features helpful videos, phone numbers, customer service information and an insurance terms glossary

The screenshot displays the Gallagher Student Health & Special Risk dashboard for Generica University. At the top, the user is greeted with 'Hello [Student Name]!' and presented with three main sections: 'My Profile', 'My Coverage Options', and 'Resources'. The 'My Profile' section shows personal details for Joe Smith, including date of birth, address, and email. The 'My Coverage Options' section highlights the 'Student Health Insurance Plan 1920' with details on carrier, enrollment status, and plan name. A prominent orange banner below these sections states: 'Important: You must elect whether you'd like to enroll or waive the plan by August 31, 2019.' The main content area is titled 'Student Health Plan Coverage' and is divided into 'Plan Summary' and 'Plan Details'. The 'Plan Summary' section provides an overview of the 'Student Health Insurance Plan 1920' and includes 'ENROLL' and 'WAIVE COVERAGE' buttons. The 'Plan Details' section offers a 'Summary of Benefits' for the 2019-20 and 2020-21 plan years, along with links to download summaries, brochures, and certificates. Below this, there are expandable sections for 'Plan Highlights', 'MassHealth Premium Assistance', and 'Frequently Asked Questions'. A row of five action buttons is provided: 'Get an ID Card VOC Letter', 'Verify Coverage', 'Find A Doctor', 'Find A Pharmacy', and 'Shop Products'. The bottom of the dashboard features a footer with the Gallagher logo, social media icons, and a 'Live Chat' button.



# Submitting a Waiver

The Gallagher Student website allows students to waive their participation in the student insurance plan by submitting a customized online waiver. Students provide their current insurance company information and it is instantly checked for validity. Intelligent rules govern the choices and data submitted in order to achieve the best possible results. Students are able to track the status of their waiver and any communications received pertaining to their waiver all on the student dashboard.



Generica University

## Waive Coverage

### Student Health Insurance Plan 1920

Name: Jane Smith    DOB: 04/23/1994    Gender: F

Enrollment in a health insurance plan is required for all students at Generica University. To ensure compliance with this policy, students are automatically billed for the Student Health Insurance Plan unless proof of comparable insurance coverage is documented. You can do this by completing an online waiver by the posted deadline. If a waiver is not submitted by the deadline, you will remain enrolled in the Student Health Insurance Plan.

You will be covered under the Student Health Insurance Plan until the end of the policy period for which you are enrolled or until you leave the program, whichever is earlier.

#### Step 1: Important Considerations

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- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sed vulputate lorem. Morbi at sem maximus, commodo dolor a, [fringilla justo](#).

Name of person completing the application

  
**CONTINUE**

---

### Step 2: Insurance Company Information

Insurance Company Information

Choose Your Insurance Company\*

  
**US-based Insurance Company?\***  
 Yes  
 No

Insurance Company Address\*

Subscriber Information


Are you the subscriber?

 Yes  
 No

Subscriber ID\*

  
**Subscriber Name\***  
  
**Subscriber Date of Birth\***  
  
**Relation to Student\***  
  
**Subscriber Phone Number\***  
  
**Plan Type**  
  
**CONTINUE**

# Enrolling in Coverage



Generica University

## Enroll in Coverage

### Student Health Insurance Plan 1920

**Name:** Jane Smith    **DOB:** 04/23/1994    **Gender:** F

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### Step 1: Disclaimer

By submitting this form I confirm,

- I am a student at Generica University and meet the eligibility requirements to enroll in this plan
- I understand that I may be asked to verify my eligibility status by the insurance carrier, and if it is determined I do not meet the eligibility requirements, my coverage will be terminated and my premium will be refunded less any paid claims or processing fees
- Other than for eligibility reasons, the premium is not refundable
- I have carefully read the plan documents and elect to enroll as indicated on this enrollment form
- Rates are not pro-rated other than listed on this enrollment form.

**ACCEPT & CONTINUE**

---

### Step 2: Enroll Dependents

We have found the following dependents tied to your account, would you like to renew their coverage?\*

- John Smith
- James Smith

**Are you enrolling your child/children?\***

Yes  
 No

**Home many children?\***

2

**Dependent #1 Information**

**Dependent Full Name\***

Full Name

**Dependent Date of Birth\***


MM/DD/YYYY

**Gender\***

Please Select

**Upload Supporting Documents**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla sed vulputate lorem. Morbi at sem maximus, commodo dolor a, fringilla justo.


 Drag & drop or [browse](#) your files.

### Step 3: Confirm Coverage

2019-2020 Student Health Insurance Plan	
<b>Coverage Period</b>	2019-2020
<b>Coverage Start Date</b>	01/15/2020
<b>Coverage End Date</b>	08/19/2020
<b>Coverage Type</b>	Student Health Plan 1920 Student Health Plan Dependent 1920 Dental Plan 1920
<b>Cost Breakdown</b>	Spouse Rate: \$1732.00 One Child Rate: \$1732.00 <b>Total: \$3,464.00</b>

Select a Qualifying Event reason for adding coverage:\*

Please Select

**CONFIRM & CONTINUE**

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### Step 3: Additional Questions

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**Question 1..**

Please Select

**Question 2..**

Enter answer

**Alternative Email Address**

Alternative Email Address

**COMPLETE & SUBMIT**

## Easy to enroll in a plan

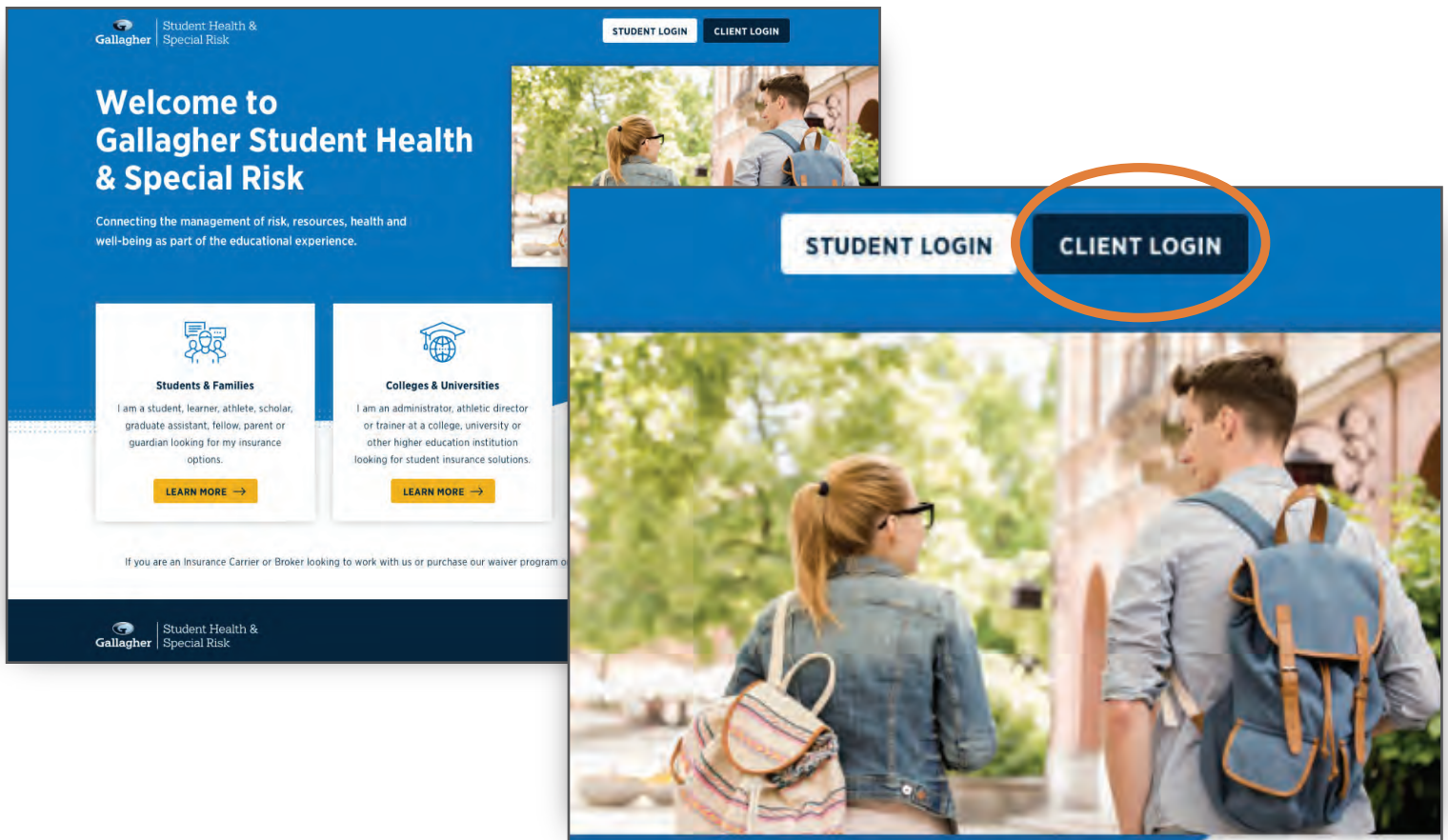
Students can submit premiums for eligible dependents and enroll in any optional supplemental plans that may be available. These secure transactions are done by credit card or e-Check through the website.

Students can access their ID Cards and print Verification Letters on demand.



# Overview of Website Services and Capabilities for Client Administrators

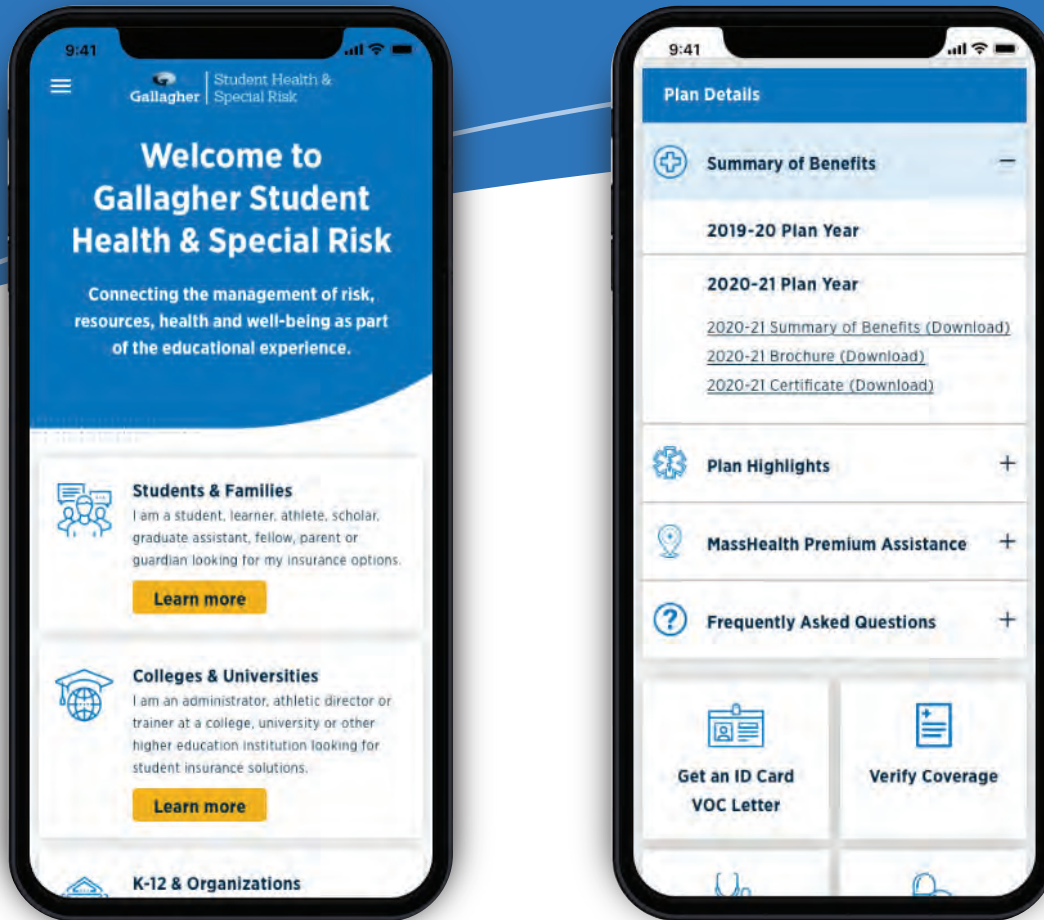
GallagherStudent.com allows clients to self-service administrative tasks for the Student Health Insurance Plan. Clients can review specific student waiver or enrollment forms, download waiver information, download and print a list of enrolled students, automatically process new student enrollment or terminate coverage, or if applicable, submit referrals directly to the claims administrator.



Gallagher Student develops online forms customized for the individual needs of each school to allow students to waive or enroll in the insurance program, enroll eligible dependents or enroll in any available supplemental insurance options. Gallagher Student has also developed simple reporting mechanisms necessary to support these functions. These report download capabilities are compatible with most Student Accounts systems to allow clients to directly manage their waiver process.

# Mobile-Compatible and Highly Secure

GallagherStudent.com is optimized for mobile access, so students can easily interact with their Student Health Insurance Plan on their cellphones.



## Website Security Parameters:

Gallagher Student sticks to industry best practices to ensure access is only allowed to legitimate users and that data is protected from unauthorized access. These practices include:

- Website protection via a web application firewall managed by Imperva. This firewall protects against critical web application security risks including scripting and access threats.
- Annual and quarterly security audit and penetration testing.
- Secure off-site web hosting provides physical and digital security complies with PCI, SOX and HIPAA guidelines.
- SOC2 compliant, which certifies we have the necessary data security controls to protect you and your students.

## 8. AJG Licenses



### Non-Resident Producer

Accident & Health or Sickness, Casualty, Life, Personal Lines,  
Property, Surety

## GALLAGHER, ARTHUR J RISK MANAGEMENT SERVICES, INC


is authorized to transact business as described above

License No: 75054

Issue Date: 02-10-2000

Expiration Date: 03-01-2024

Generated by Sircon 261684122

<p>STATE OF IDAHO DEPARTMENT OF INSURANCE</p> <p>THIS IS TO CERTIFY THAT</p> <p>GALLAGHER, ARTHUR J RISK MANAGEMENT SERVICES, INC</p> <p>LICENSE NUMBER: 75054</p> 	<p>IS HEREBY AUTHORIZED TO TRANSACT BUSINESS IN ACCORDANCE TO THE LICENSE DESCRIPTION SHOWN BELOW:</p> <p><b>Non-Resident Producer</b> Accident &amp; Health or Sickness, Casualty, Life, Personal Lines, Property, Surety</p> <p>Issue Date: 02-10-2000      Expiration Date: 03-01-2024</p> <p>Generated by Sircon 261684122</p>
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# 9. Sample Claims Summary Report



# Sample University Report

Claims Reporting  
For the Period Ending 09/30/2017

# Table of Contents

	• Commentary
	• Enrollment and Premium Summary
	• Paid Claims Data
	• High Dollar Claims Summary
	• Top Benefit Expenses
	• Network Data



# Commentary

In our efforts to provide you with an executive overview, Gallagher Student Health & Special Risk would like to highlight the following:

- Paid claims for the 2017-18 policy year are currently running 41.1% behind where they were at the same point in time for the 2016-17 policy year.
- Current annual enrollment for the 2017-18 policy year is up 9.5% from the 2016-17 policy year total
- The top benefit utilized for both the 2016-17 & 2017-18 policy years is the Pharmacy benefit.
- There were 40 high dollar claims to date for the 2016-17 policy year accounting for 19% of total paid claims. There is 1 high dollar claim for the 2017-18 policy year accounting for 10% of total paid claims.



# Enrollment and Premium Data

## Enrollment and Premium Summary (2014/15)

Year	Category	Rates				Number Enrolled				Premium
		Annual	Fall	Spring	Summer	Annual	Fall	Spring	Summer	
2014/2015	Student	\$ 2,274.00	\$ 866.00	\$ 1,408.00	\$ 467.00	4981	35	235	8	\$ 11,687,984.00
(3)(4)	Student/Spouse	\$ 6,803.00		\$ 4,212.00	\$ 1,398.00	34	0	1	0	\$ 235,514.00
	Student/Child(ren)	\$ 6,803.00		\$ 4,212.00	\$ 1,398.00	11	0	0	0	\$ 74,833.00
	Student/Spouse/Child(ren)	\$ 10,768.00		\$ 6,667.00	\$ 2,212.00	16	0	2	0	\$ 185,622.00
	Prorates					14	0	74	316	\$ 176,445.00
	<b>Continuation Plan</b>	<b>6 month</b>				<b>6 month</b>				
	Student	\$ 1,500.00				84				\$ 126,000.00
	Student/Spouse	\$ 4,307.52				4				\$ 17,230.08
	Student/Child(ren)	\$ 4,307.52				1				\$ 4,307.52
	Student/Spouse/Child(ren)	\$ 6,812.52				3				\$ 20,437.56
	Prorates					0				\$ -
<b>Totals (2) =</b>										<b>\$ 12,528,373.16</b>

- (1) Premium based on final audited enrollment
- (2) Premium based on current enrollment
- (3) Rates do not include Basix Dental Fee
- (4) Rates are fully insured premium net of Gallagher Student Health & Special Risk fee



# Enrollment and Premium Data

## Enrollment and Premium Summary (2015/16)

Year 2015/2016 (3)(4)	Category	Rates				Number Enrolled				Premium
		Annual	Fall	Spring	Summer	Annual	Fall	Spring	Summer	
	<b>DOMESTIC</b>									
	Student	\$ 2,274.00	\$ 864.00	\$ 1,410.00	\$ 466.00	3367	0	166	0	\$ 7,890,618.00
	Student/Spouse	\$ 4,548.00	\$ 1,728.00	\$ 2,820.00	\$ 932.00	33	0	1	0	\$ 152,904.00
	Student/Child	\$ 4,548.00	\$ 1,728.00	\$ 2,820.00	\$ 932.00	2	0	0	0	\$ 9,096.00
	Student/Children	\$ 6,822.00	\$ 2,592.00	\$ 4,230.00	\$ 1,398.00	1	0	0	0	\$ 6,822.00
	Student/Spouse/Child	\$ 6,822.00	\$ 2,592.00	\$ 4,230.00	\$ 1,398.00	6	0	0	0	\$ 40,932.00
	Student/Spouse/Children	\$ 9,096.00	\$ 3,456.00	\$ 5,640.00	\$ 1,864.00	2	0	0	0	\$ 18,192.00
	Prorates					41	0	280	0	\$ 166,260.00
										<b>Subtotal</b> \$ 8,284,824.00
	<b>Domestic Continuation Plan</b>	<b>6 month</b>				<b>6 month</b>				
	Student	\$ 1,137.00				94				\$ 106,878.00
	Student/Spouse	\$ 2,274.00				4				\$ 9,096.00
	Student/Child	\$ 2,274.00				0				\$ -
	Student/Children	\$ 3,411.00				0				\$ -
	Student/Spouse/Child	\$ 3,411.00				0				\$ -
	Student/Spouse/Child(ren)	\$ 4,548.00				0				\$ -
	Prorates					0				\$ -
										<b>Subtotal</b> \$ 115,974.00
	<b>INTERNATIONAL</b>									
	Student	\$ 2,274.00	\$ 864.00	\$ 1,410.00	\$ 466.00	1936	69	99	0	\$ 4,601,670.00
	Student/Spouse	\$ 4,548.00	\$ 1,728.00	\$ 2,820.00	\$ 932.00	25	0	0	0	\$ 113,700.00
	Student/Child	\$ 4,548.00	\$ 1,728.00	\$ 2,820.00	\$ 932.00	3	0	0	0	\$ 13,644.00
	Student/Children	\$ 6,822.00	\$ 2,592.00	\$ 4,230.00	\$ 1,398.00	0	0	0	0	\$ -
	Student/Spouse/Child	\$ 6,822.00	\$ 2,592.00	\$ 4,230.00	\$ 1,398.00	9	0	0	0	\$ 61,398.00
	Student/Spouse/Children	\$ 9,096.00	\$ 3,456.00	\$ 5,640.00	\$ 1,864.00	6	0	0	0	\$ 54,576.00
	Prorates					15	0	160	0	\$ 56,778.00
										<b>Subtotal</b> \$ 4,901,766.00
	<b>International Continuation Plan</b>	<b>6 month</b>				<b>6 month</b>				
	Student	\$ 1,137.00				33				\$ 37,521.00
	Student/Spouse	\$ 2,274.00				0				\$ -
	Student/Child	\$ 2,274.00				1				\$ 2,274.00
	Student/Children	\$ 3,411.00				0				\$ -
	Student/Spouse/Child	\$ 3,411.00				0				\$ -
	Student/Spouse/Child(ren)	\$ 4,548.00				0				\$ -
	Prorates					1				\$ 528.00
										<b>Subtotal</b> \$ 40,323.00
										<b>Total (2)</b> \$ 12,342,887.00

(2) Premium based on current enrollment

(3) Rates do not include Basix Dental Fee

(4) Rates are fully insured premium net of Gallagher Student Health & Special Risk fee



# Enrollment and Premium Data

## Enrollment and Premium Summary (2016/17)

Year	Category	Rates				Number Enrolled				Premium
		Annual	Fall	Spring	Summer	Annual	Fall	Spring	Summer	
2016/2017 (3)(4)	<b>DOMESTIC</b>									
	Student	\$ 2,388.00	\$ 909.00	\$ 1,479.00	\$ 491.00	3469	0	144	18	\$ 8,505,786.00
	Student/Spouse	\$ 4,776.00	\$ 1,818.00	\$ 2,958.00	\$ 982.00	40	0	4	0	\$ 202,872.00
	Student/Child	\$ 4,776.00	\$ 1,818.00	\$ 2,958.00	\$ 982.00	4	0	0	0	\$ 19,104.00
	Student/Children	\$ 7,164.00	\$ 2,727.00	\$ 4,437.00	\$ 1,473.00	3	0	0	0	\$ 21,492.00
	Student/Spouse/Child	\$ 7,164.00	\$ 2,727.00	\$ 4,437.00	\$ 1,473.00	10	0	1	0	\$ 76,077.00
	Student/Spouse/Children	\$ 9,552.00	\$ 3,636.00	\$ 5,916.00	\$ 1,964.00	4	0	1	0	\$ 44,124.00
	Prorates	N/A	N/A	N/A	N/A	44	0	55	188	\$ 170,262.36
									<b>Subtotal</b>	\$ 9,039,717.36
		<b>INTERNATIONAL</b>								
	Student	\$ 2,388.00	\$ 909.00	\$ 1,479.00	\$ 491.00	1891	90	71	1	\$ 4,703,018.00
	Student/Spouse	\$ 4,776.00	\$ 1,818.00	\$ 2,958.00	\$ 982.00	27	1	0	1	\$ 131,752.00
	Student/Child	\$ 4,776.00	\$ 1,818.00	\$ 2,958.00	\$ 982.00	11	0	0	0	\$ 52,536.00
	Student/Children	\$ 7,164.00	\$ 2,727.00	\$ 4,437.00	\$ 1,473.00	0	0	0	0	\$ -
Student/Spouse/Child	\$ 7,164.00	\$ 2,727.00	\$ 4,437.00	\$ 1,473.00	7	0	0	0	\$ 50,148.00	
Student/Spouse/Children	\$ 9,552.00	\$ 3,636.00	\$ 5,916.00	\$ 1,964.00	6	0	0	1	\$ 59,276.00	
Prorates	N/A	N/A	N/A	N/A	9	0	3	160	\$ 56,603.70	
								<b>Subtotal</b>	\$ 5,053,333.70	
	<b>Continuation Plan</b>	<b>6 month</b>	<b>12 month</b>		<b>6 month</b>	<b>12 month</b>				
Student	\$ 1,194.00	\$ 2,388.00			124	0			\$ 148,056.00	
Student/Spouse	\$ 2,388.00	\$ 4,776.00			1	0			\$ 2,388.00	
Student/Child	\$ 2,388.00	\$ 4,776.00			0	0			\$ -	
Student/Children	\$ 3,582.00	\$ 7,164.00			0	0			\$ -	
Student/Spouse/Child	\$ 3,582.00	\$ 7,164.00			1	0			\$ 3,582.00	
Student/Spouse/Children	\$ 4,776.00	\$ 9,552.00			1	0			\$ 4,776.00	
Prorates	N/A	N/A			2	0			\$ 1,590.51	
								<b>Subtotal</b>	\$ 160,392.51	
								<b>Total (2)</b>	\$ 14,253,443.57	

(2) Premium based on current enrollment

(3) Rates do not include Basix Dental Fee

(4) Rates are fully insured premium net of Gallagher Student Health & Special Risk fee





# Enrollment and Premium Data

## Enrollment and Premium Summary (2017/18)

Year	Category	Rates				Number Enrolled				Premium	
		Annual	Fall	Spring	Summer	Annual	Fall	Spring	Summer		
2017/2018 (3)(4)	<b>DOMESTIC</b>										
	Student	\$ 2,622.00	\$ 998.00	\$ 1,624.00	-	3891	0	0	0	\$ 10,202,202.00	
	Student/Spouse	\$ 5,244.00	\$ 1,996.00	\$ 3,248.00	-	43	0	0	0	\$ 225,492.00	
	Student/Child	\$ 5,244.00	\$ 1,996.00	\$ 3,248.00	-	8	0	0	0	\$ 41,952.00	
	Student/Children	\$ 7,866.00	\$ 2,994.00	\$ 4,872.00	-	1	0	0	0	\$ 7,866.00	
	Student/Spouse/Child	\$ 7,866.00	\$ 2,994.00	\$ 4,872.00	-	15	0	0	0	\$ 117,990.00	
	Student/Spouse/Children	\$ 10,488.00	\$ 3,992.00	\$ 6,496.00	-	5	0	0	0	\$ 52,440.00	
	Prorates	N/A	N/A	N/A	N/A	4	0	0	0	\$ 9,028.80	
										<b>Subtotal</b>	\$ 10,656,970.80
		<b>INTERNATIONAL</b>									
	Student	\$ 2,622.00	\$ 998.00	\$ 1,624.00	-	2001	48	0	0	\$ 5,294,526.00	
	Student/Spouse	\$ 5,244.00	\$ 1,996.00	\$ 3,248.00	-	30	0	0	0	\$ 157,320.00	
	Student/Child	\$ 5,244.00	\$ 1,996.00	\$ 3,248.00	-	7	0	0	0	\$ 36,708.00	
	Student/Children	\$ 7,866.00	\$ 2,994.00	\$ 4,872.00	-	0	0	0	0	\$ -	
Student/Spouse/Child	\$ 7,866.00	\$ 2,994.00	\$ 4,872.00	-	9	0	0	0	\$ 70,794.00		
Student/Spouse/Children	\$ 10,488.00	\$ 3,992.00	\$ 6,496.00	-	10	0	0	0	\$ 104,880.00		
Prorates	N/A	N/A	N/A	N/A	2	0	0	0	\$ 4,716.00		
									<b>Subtotal</b>	\$ 5,668,944.00	
	<b>Continuation Plan</b>	<b>6 month</b>	<b>12 month</b>		<b>6 month</b>	<b>12 month</b>					
Student	\$ 1,322.00	\$ 2,644.00			141	0			\$ 186,402.00		
Student/Spouse	\$ 2,644.00	\$ 5,288.00			6	0			\$ 15,864.00		
Student/Child	\$ 2,644.00	\$ 5,288.00			0	0			\$ -		
Student/Children	\$ 3,966.00	\$ 7,932.00			0	0			\$ -		
Student/Spouse/Child	\$ 3,966.00	\$ 7,932.00			2	0			\$ 7,932.00		
Student/Spouse/Children	\$ 5,288.00	\$ 10,576.00			1	0			\$ 5,288.00		
Prorates	N/A	N/A			1	0			\$ 1,051.20		
									<b>Subtotal</b>	\$ 216,537.20	
									<b>Total (2)</b>	\$ 16,542,452.00	

(2) Premium based on current enrollment

(3) Rates do not include Basix Dental Fee

(4) Rates are fully insured premium net of Gallagher Student Health & Special Risk fee







# Enrollment and Premium Data

## Enrollment and Premium Summary

### Percentage Change in Enrollment from the 2014-15 to 2017-18 Policy Years

	2014-2015		2015-2016 **		2016-2017 **		2017-2018 **	
	Students	Dependents	Students	Dependents	Students	Dependents	Students	Dependents
<b>Enrollment:</b>								
<b>Annual</b>	5030	95	5417	151	5503	174	6023	186
(%)Change	7.00%	-25.78%	7.69%	58.95%	1.59%	15.23%	9.45%	6.90%
<b>Fall</b>	35	0	69	0	91	1	48	0
(%)Change	94.44%	-	97.14%	-	31.88%	100.00%	-47.25%	-100.00%
<b>Spring *</b>	735	20	675	32	618	43	0	0
(%)Change	80.15%	300.00%	-8.16%	60.00%	-8.44%	34.38%	N/A	N/A
<b>Continuation</b>	92	13	130	6	128	7	150	14
(%)Change	-18.58%	8.33%	41.30%	-53.85%	-1.54%	16.67%	17.19%	100.00%

\* Spring enrollment from prior years includes Summer enrollment totals.

\*\* Premium/Enrollment not yet audited.



# Paid Claims Data through 09-30-2017

	2014/2015 (1)	2015/2016 (1)(2)	2016/2017 (1)(3)	2017/2018 (1)
<b>A. Aggregate Loss Ratio</b>				
Total Premium	\$ 12,528,373.16	\$ 13,342,887.00	\$ 14,253,443.57	\$ 16,542,452.00
Total Student Paid Claims	\$ 7,097,221.85	\$ 9,931,262.72	\$ 7,290,438.03	\$ 87,898.39
Total Dependent Paid Claims	\$ 342,954.07	\$ 1,021,554.46	\$ 671,975.98	\$ 31,102.12
Pharmacy Claims	\$ 1,459,808.43	\$ 2,037,292.76	\$ 2,278,308.17	\$ 119,507.66
Continuation Plan Claims	\$ 220,957.83	\$ 570,019.32	\$ 511,102.45	\$ 26,763.65
Total Paid Claims	\$ 9,120,942.18	\$ 13,560,129.26	\$ 10,751,824.63	\$ 265,271.82
Combined Loss Ratio	73%	102%	75%	2%
<b>B. High Dollar Claims Analysis</b> (Claims In excess of \$25,000.00)				
Number of Claims - Student Only	29	46	36	1
Total Dollar Amount - Student Only	\$ 1,780,482.57	\$ 4,682,516.96	\$ 1,834,826.67	\$ 25,921.85
% of Total Student Paid Claims	25%	47%	25%	29%
<b>Dollar % Change in Total High \$ Claims (4)</b>	<b>-16%</b>	<b>185%</b>	<b>-61%</b>	<b>-</b>
Number of Claims - Dependants	0	5	4	0
Total Dollar Amount - Dependants	\$ -	\$ 395,205.47	\$ 170,215.15	\$ -
% of Total Dependant Paid Claims	0%	39%	25%	0%

(1) Paid claims for prior policy years are cumulative and include runoff claims paid to date. Paid claims for the current policy year are cumulative to this point in time. Premium / Audit not finalized.

(2) Total claims paid as of 09/30/16 \$12,191,478.32

(3) Total claims paid as of 09/30/16 \$388,152.39

(4) Current Year High Dollar Claims Compared to Prior year at same point in time : \$0.00



# Plan Usage Data

<b>Plan Usage</b>	<b>2014/2015</b>	<b>2015/2016</b>	<b>2016/2017</b>	<b>2017/2018</b>
Students with one diagnosis	896	1025	1099	730
Students with two diagnoses	882	893	948	156
Students with three + diagnoses	1978	2189	2141	32
Total number of claimants	3756	4107	4188	918
Percentage of students using plan	64%	65%	66%	15%
Dependants with one diagnosis	19	20	46	45
Dependants with two diagnoses	9	42	30	11
Dependants with three + diagnoses	87	86	107	4
Total number of claimants	115	148	183	60
Percentage of Dependants using plan	90%	78%	81%	31%

Plan Usage does not include continuation plan information.



# High Dollar Claims Data 2014/15

Policy Year	Status	Paid Amount	Diagnosis
2014-2015	Student 1	\$ 256,775	73730 - SCOLIOSIS , IDIOPATHIC
	Student 2	\$ 186,890	30490 - UNSPECIFIED DRUG DEPEND UNSPEC
	Student 3	\$ 173,950	3071 - ANOREXIA NERVOSA
	Student 4	\$ 148,086	30000 - ANXIETY STATE, UNSPECIFIED
	Student 5	\$ 107,666	5856 - END STAGE RENAL DISEASE
	Student 6	\$ 102,123	29632 - MAJOR DPRSV DISORDER RECURRENT EPISODE MODERATE
	Student 7	\$ 68,970	29633 - MAJ DPRSV D/O RECUR EPIS SEV W/O PSYCHOT BHV
	Student 8	\$ 53,965	29644 - BIPLR I MOST RECENT EPIS MNIC SEV W/PSYCHOT BHV
	Student 9	\$ 49,978	1625 - MALIGNANT NEOPLASM LOWER LOBE BRONCHUS OR LUNG
	Student 10	\$ 42,988	7464 - CONGENITAL INSUFFICIENCY OF AORTIC VALVE
	Student 11	\$ 42,984	RX TECFIDERA TREATS MULTIPLE SCLEROSIS
	Student 12	\$ 42,537	6850 - PILONIDAL CYST WITH ABSCESS
	Student 13	\$ 36,713	RX CIMZIA TREATS CROHN'S,RHEUMATOID ARTHRITIS, ETC.
	Student 14	\$ 35,165	29680 - BIPOLAR DISORDER UNSPECIFIED
	Student 15	\$ 33,548	5559 - REGIONAL ENTERITIS OF UNSPECIFIED SITE
	Student 16	\$ 32,345	5559 - REGIONAL ENTERITIS OF UNSPECIFIED SITE
	Student 17	\$ 31,675	5569 - UNSPECIFIED ULCERATIVE COLITIS
	Student 18	\$ 31,468	2839 - ACQUIRED HEMOLYTIC ANEMIA UNSPECIFIED
	Student 19	\$ 31,312	73392 - CHONDROMALACIA
	Student 20	\$ 29,930	8911 - OPEN WOUND OF KNEE LEG AND ANKLE COMPLICATED
	Student 21	\$ 29,908	5409 - ACUTE APPENDICITIS WITHOUT MENTION PERITONITIS
	Student 22	\$ 29,263	30000 - ANXIETY STATE, UNSPECIFIED
	Student 23	\$ 27,787	V700 - ROUTINE GENERAL MEDICAL EXAM@HEALTH CARE FACL
	Student 24	\$ 26,815	5770 - ACUTE PANCREATITIS
	Student 25	\$ 26,584	8442 - SPRAIN AND STRAIN OF CRUCIATE LIGAMENT OF KNEE
	Student 26	\$ 25,447	29633 - MAJ DPRSV D/O RECUR EPIS SEV W/O PSYCHOT BHV
	Student 27	\$ 25,363	RX ATRIPLA TREATS HIV INFECTION
	Student 28	\$ 25,182	8832 - OPEN WOUND OF FINGER WITH TENDON INVOLVEMENT
	Student 29	\$ 25,065	63310 - TUBAL PREGNANCY WITHOUT INTRAUTERINE PREGNANCY
		\$ <b>1,780,483</b>	





# High Dollar Claims Data 2015/16

Policy Year	Status	Paid Amount	Diagnosis	Status	Paid Amount	Diagnosis
2015-2016	Student 1	\$ 1,360,693	R0602 - SHORTNESS OF BREATH	Student 25	\$ 37,146	RX TECFIDERA FOR MULTIPLE SCLEROSIS
	Student 2	\$ 475,548	5856 - END STAGE RENAL DISEASE	Student 26	\$ 36,097	193 - MALIGNANT NEOPLASM OF THYROID GLAND
	Student 3	\$ 433,026	79319 - OTHER NONSPECIFIC ABNORMAL FINDING OF LUNG FIELD	Student 27	\$ 35,791	73342 - ASEPTIC NECROSIS OF HEAD AND NECK OF FEMUR
	Student 4	\$ 281,540	Z856 - PERSONAL HISTORY OF LEUKEMIA	Student 28	\$ 34,484	RX ENBREL FOR ARTHRITIS
	Dependent 1	\$ 238,684	Z3800 - SINGLE LIVEBORN INFANT DELIVERED VAGINALLY	Student 29	\$ 33,394	G7000 - MYASTHENIA GRAVIS WITHOUT ACUTE EXACERBATION
	Student 5	\$ 128,956	30490 - UNSPECIFIED DRUG DEPEND UNSPEC	Student 30	\$ 32,980	I6789 - OTHER CEREBROVASCULAR DISEASE
	Student 6	\$ 122,761	F1910 - OTHER PSYCHOACTIVE SUBSTANCE ABUSE UNCOMPLICATED	Student 31	\$ 32,976	0389 - UNSPECIFIED SEPTICEMIA
	Student 7	\$ 120,670	F329 - MAJOR DEPRESSIVE DISORDER SINGLE EPISODE UNS	Dependent 3	\$ 32,920	Z3800 - SINGLE LIVEBORN INFANT DELIVERED VAGINALLY
	Student 8	\$ 107,841	30750 - EATING DISORDER, UNSPECIFIED	Student 32	\$ 32,762	RX STELARA AND ENBREL FOR ARTHRITIS
	Student 9	\$ 88,760	8449 - SPRAIN&STRAIN OF UNSPECIFIED SITE OF KNEE&LEG	Student 33	\$ 32,638	A419 - SEPSIS UNSPECIFIED ORGANISM
	Student 10	\$ 83,324	1539 - MALIGNANT NEOPLASM OF COLON UNSPECIFIED SITE	Student 34	\$ 32,049	F322 - MAJ DEPRESS D/O SINGLE EPIS SEV W/O PSYCH FEATUR
	Student 11	\$ 78,440	RX HUMIRA PEN FOR RHEUMETOID ARTHRITIS	Student 35	\$ 31,993	4481 - NEVUS, NON-NEOPLASTIC
	Student 12	\$ 78,346	5552 - RGN ENTERITIS SMALL INTESTINE W/LG INTESTINE	Student 36	\$ 30,298	8449 - SPRAIN&STRAIN OF UNSPECIFIED SITE OF KNEE&LEG
	Student 13	\$ 73,202	F332 - MAJ DEPRESS D/O RECURRENT SEV W/O PSYCH FEATURES	Dependent 4	\$ 30,136	8442 - SPRAIN AND STRAIN OF CRUCIATE LIGAMENT OF KNEE
	Student 14	\$ 71,225	29622 - MAJOR DPRSV DISORDER SINGLE EPISODE MODERATE	Student 37	\$ 29,800	J90 - PLEURAL EFFUSION NOT ELSEWHERE CLASSIFIED
	Student 15	\$ 66,459	RX TECFIDERA FOR MULTIPLE SCLEROSIS	Dependent 5	\$ 28,828	F329 - MAJOR DEPRESSIVE DISORDER SINGLE EPISODE UNS
	Dependent 2	\$ 64,638	O42919 - PT PROM UNS TIME BTWN RUPT & ONS & LABOR UNS TRI	Student 38	\$ 28,629	S83519A - SPRAIN ANT CRUCIATE LIGAMENT UNS KNEE INIT ENC
	Student 16	\$ 63,682	G935 - COMPRESSION OF BRAIN	Student 39	\$ 28,336	S83241D - OTH TEAR MED MENISCUS CURR INJ RT KNEE SBSQT ENC
	Student 17	\$ 58,678	RX GILENYA FOR MULTIPLE SCLEROSIS	Student 40	\$ 27,893	30928 - ADJ DISORDER WITH MIXED ANXIETY & DEPRESSED MOOD
	Student 18	\$ 56,297	M0609 - RA WITHOUT RHEUMATOID FACTOR MULTIPLE SITES	Student 41	\$ 27,811	RX HUMIRA PEN FOR RHEUMETOID ARTHRITIS
	Student 19	\$ 51,498	RX HUMIRA PEN FOR RHEUMETOID ARTHRITIS	Student 42	\$ 27,767	D696 - THROMBOCYTOPENIA UNSPECIFIED
	Student 20	\$ 44,736	RX NOXAFIL,TRETINOIN, LINEZOLID FOR ANTI-FUNGAL /ANTI-ACNE	Student 43	\$ 25,962	M25551 - PAIN IN RIGHT HIP
	Student 21	\$ 44,555	RX STELARA FOR PLAQUE PSORIASIS OR PSORIATIC ARTHRITIS	Student 44	\$ 25,211	73340 - ASEPTIC NECROSIS OF BONE SITE UNSPECIFIED
	Student 22	\$ 42,866	29633 - MAJ DPRSV D/O RECUR EPIS SEV W/O PSYCHOT BHV	Student 45	\$ 25,117	F329 - MAJOR DEPRESSIVE DISORDER SINGLE EPISODE UNS
	Student 23	\$ 37,768	87352 - OPEN WOUND OF FOREHEAD, COMPLICATED	Student 46	\$ 25,003	M2600 - UNSPECIFIED ANOMALY OF JAW SIZE
	Student 24	\$ 37,508	S82842A - DISPL BIMALLEOLAR FX LT LOW LEG INIT CLOSED FX		<b>\$ 5,077,722</b>	



# High Dollar Claims Data 2016/17

Policy Year	Status	Paid Amount	Diagnosis	Status	Paid Amount	Diagnosis
2016-2017	Student 1	\$ 199,804	F439 - REACTION TO SEVERE STRESS UNSPECIFIED	Student 24	\$ 30,658	K3580 - UNSPECIFIED ACUTE APPENDICITIS
	Student 2	\$ 128,654	F5000 - ANOREXIA NERVOSA UNSPECIFIED	Student 25	\$ 30,542	PBM CLAIM - REACHED OUT TO UHC FOR DETAIL
	Student 3	\$ 96,996	RX HUMIRA PEN FOR RHEUMETOID ARTHRITIS	Student 26	\$ 30,248	PBM CLAIM - REACHED OUT TO UHC FOR DETAIL
	Student 4	\$ 88,751	K709 - ALCOHOLIC LIVER DISEASE UNSPECIFIED	Student 27	\$ 30,113	PBM CLAIM - REACHED OUT TO UHC FOR DETAIL
	Student 5	\$ 80,914	M25559 - PAIN IN UNSPECIFIED HIP	Student 28	\$ 30,052	S86912A - STRAIN UNS MUSCLE TENDON LOW LEG LT LEG INIT ENC
	Student 6	\$ 76,616	RX XYREM FOR NARCOLEPSY	Student 29	\$ 29,676	F419 - ANXIETY DISORDER UNSPECIFIED
	Student 7	\$ 75,276	I471 - SUPRAVENTRICULAR TACHYCARDIA	Dependent 4	\$ 28,725	P0730 - PRETERM NEWBORN UNSPECIFIED WEEKS OF GESTATION
	Dependent 1	\$ 73,636	Q233 - CONGENITAL MITRAL INSUFFICIENCY	Student 30	\$ 28,685	F1020 - ALCOHOL DEPENDENCE UNCOMPLICATED
	Student 8	\$ 72,852	F900 - ATTN-DEFICIT HYPERACTIVITY D/O INATTENTIVE TYPE	Student 31	\$ 28,637	S82844A - NDSPL BIMALLEOLAR FX RT LOW LEG INIT ENC CLOSED
	Student 9	\$ 67,523	RX TECFIDERA FOR MULTIPLE SCLEROSIS	Student 32	\$ 28,112	T24101A - BURN 1ST DEG UNS SITE RT LL NO ANK FOOT INIT ENC
	Student 10	\$ 57,905	R040 - EPISTAXIS	Student 33	\$ 27,464	S52501A - UNS FX LOWER END RT RADIUS INITIAL ENC CLOSED FX
	Student 11	\$ 56,909	RX ENBREL FOR ARTHRITIS	Student 34	\$ 27,404	F439 - REACTION TO SEVERE STRESS UNSPECIFIED
	Student 12	\$ 48,859	RX GILENYA FOR MULTIPLE SCLEROSIS	Student 35	\$ 27,103	S82851A - DISPL TRIMALLEOLAR FX RT LOW LEG INIT CLOS FX
	Student 13	\$ 48,532	D5700 - HB-SS DISEASE WITH CRISIS UNSPECIFIED	Student 36	\$ 26,859	K5090 - CROHNS DISEASE UNS WITHOUT COMPLICATIONS
	Student 14	\$ 46,434	G7001 - MYASTHENIA GRAVIS WITH ACUTE EXACERBATION			
	Student 15	\$ 38,514	RX HUMIRA PEN FOR RHEUMETOID ARTHRITIS		<b>\$ 2,005,042</b>	
	Student 16	\$ 37,273	K449 - DIAPHRAGMATIC HERNIA W/O OBSTRUCTION OR GANGRENE			
	Student 17	\$ 36,900	J329 - CHRONIC SINUSITIS UNSPECIFIED			
	Student 18	\$ 36,656	RX GILENYA FOR MULTIPLE SCLEROSIS			
	Dependent 2	\$ 35,652	O3442 - MATERNAL CARE OTH ABNORMALITIES CERVIX 2ND TRI			
	Student 19	\$ 34,007	F322 - MAJ DEPRESS D/O SINGLE EPIS SEV W/O PSYCH FEATUR			
	Student 20	\$ 33,817	T1491 - SUICIDE ATTEMPT			
	Student 21	\$ 33,049	S83511A - SPRAIN ANT CRUCIATE LIGAMENT RT KNEE INITIAL ENC			
	Dependent 3	\$ 32,203	G40824 - EPILEPTIC SPASMS INTRACTABLE WITHOUT SE			
	Student 22	\$ 32,043	G935 - COMPRESSION OF BRAIN			
	Student 23	\$ 30,994	K810 - ACUTE CHOLECYSTITIS			



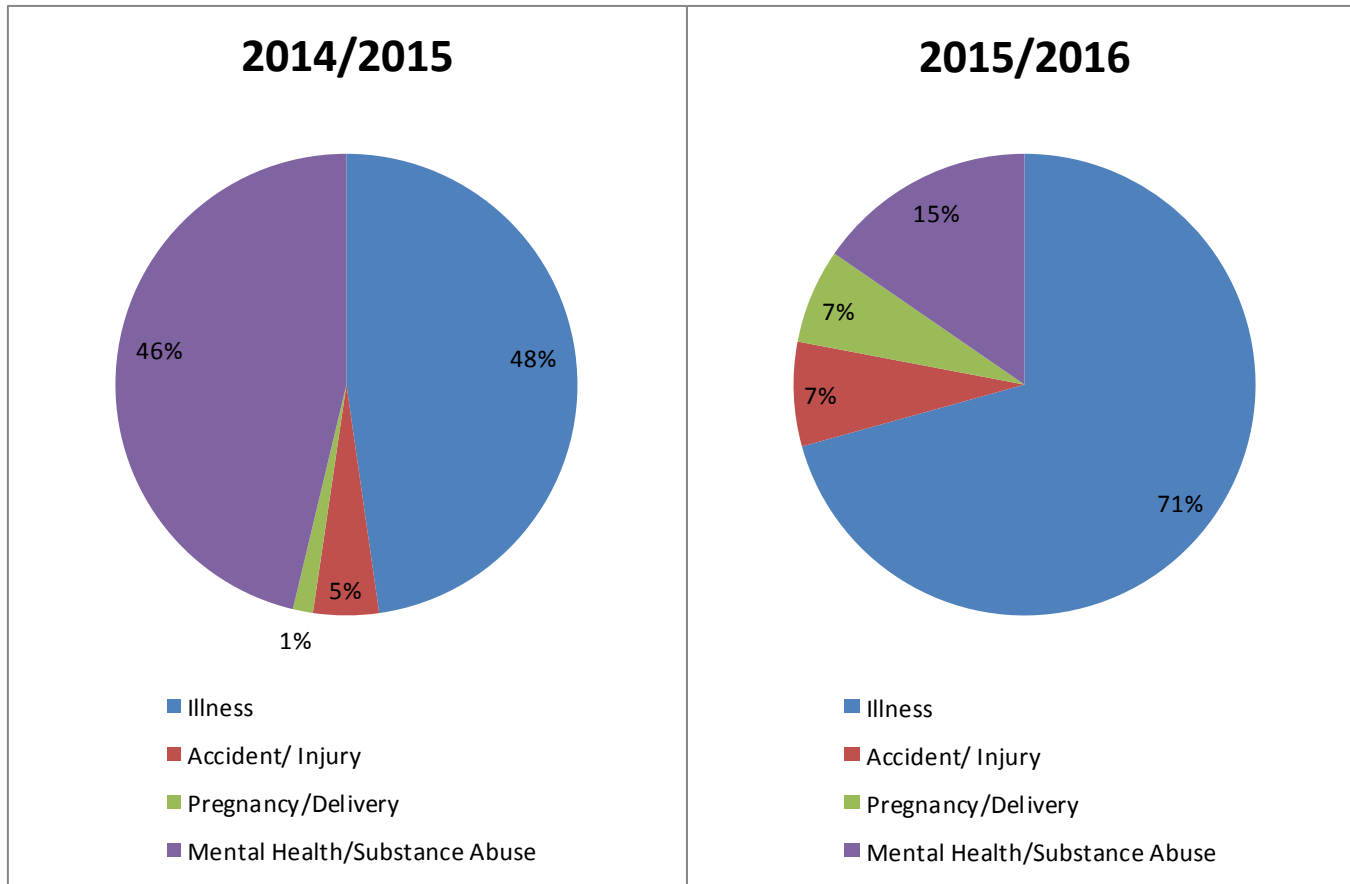
# High Dollar Claims Data 2017/18

<b>Policy Year</b>	<b>Status</b>	<b>Paid Amount</b>	<b>Diagnosis</b>
2017-2018	Student 1	\$ 25,922	O480 - POST-TERM PREGNANCY
		\$ <b>25,922</b>	

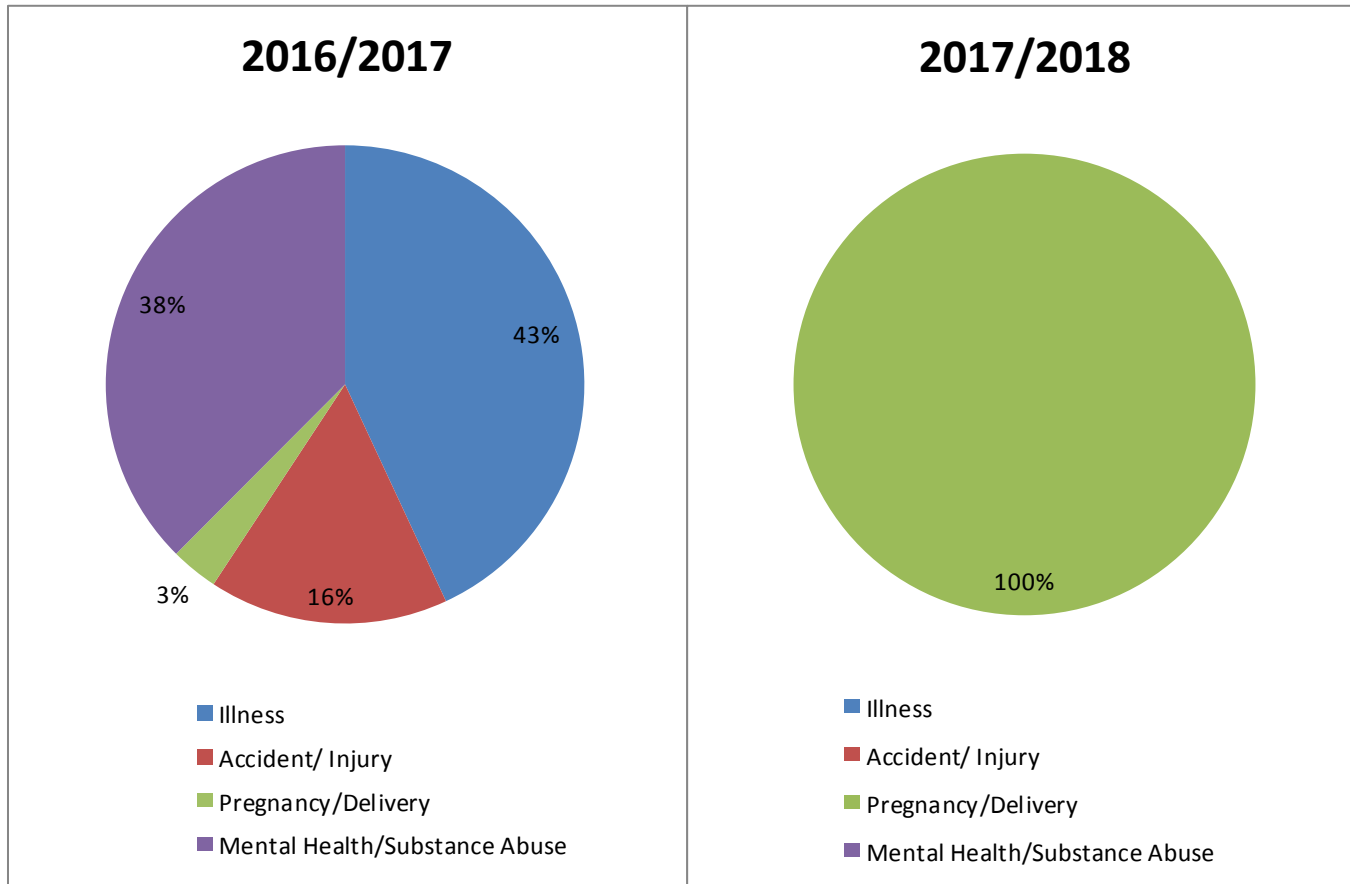




# High Dollar Categories



# High Dollar Categories



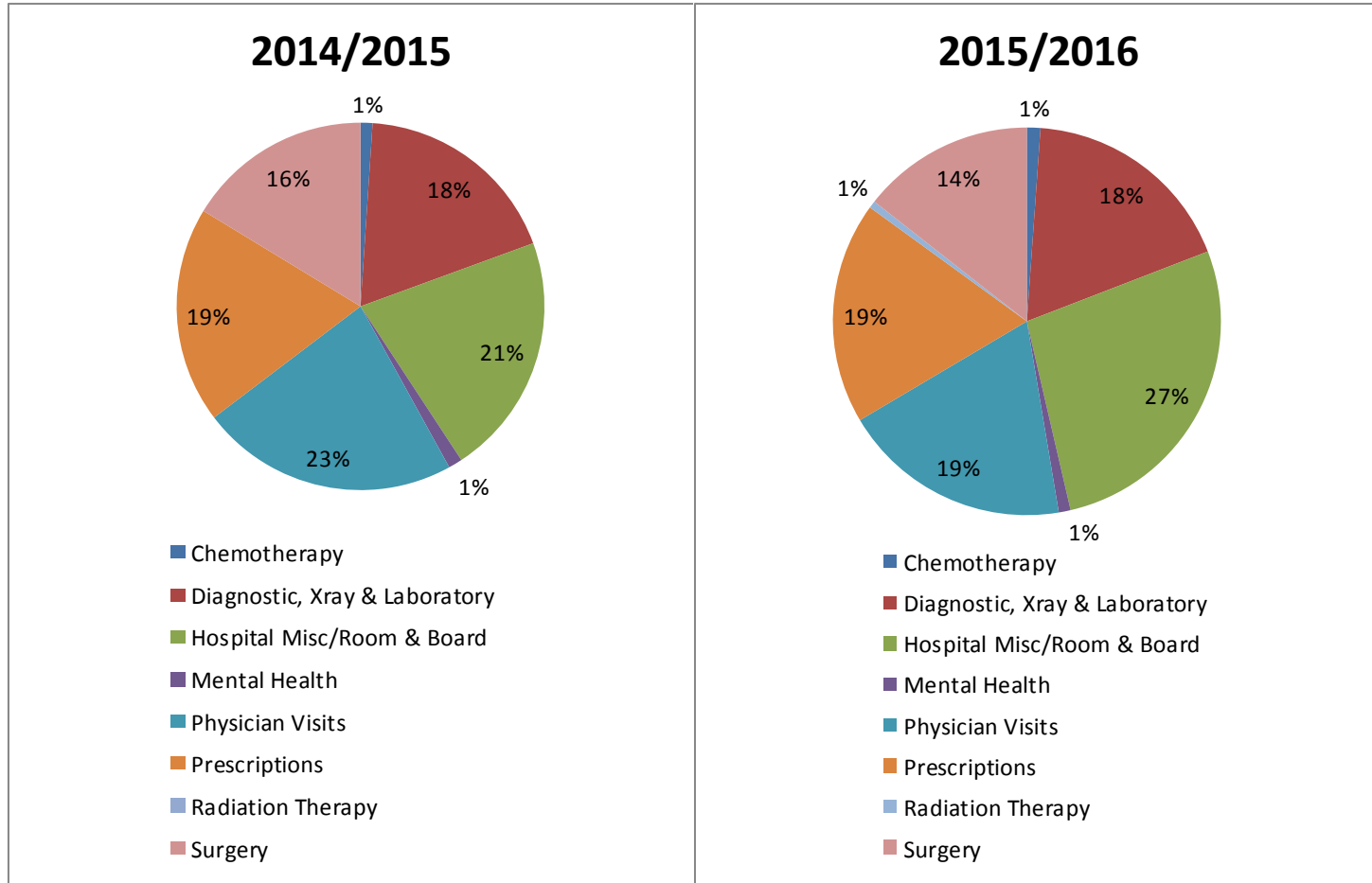


# Top Benefit Expenses

Top Benefit Expenses	2014/2015	2015/2016	2016/2017	2017/2018
Chemotherapy	\$ 84,644	\$ 130,590	\$ 48,473	\$ -
Diagnostic, Xray & Laboratory	\$ 1,481,951	\$ 2,087,188	\$ 1,670,898	\$ 22,368
Hospital Misc/Room & Board	\$ 1,723,044	\$ 3,159,030	\$ 1,560,009	\$ 63,582
Mental Health	\$ 98,495	\$ 114,355	\$ 320	\$ -
Physician Visits	\$ 1,829,682	\$ 2,216,600	\$ 2,119,568	\$ 17,579
Prescriptions	\$ 1,536,479	\$ 2,146,864	\$ 2,460,346	\$ 128,416
Radiation Therapy	\$ -	\$ 69,344	\$ -	\$ -
Surgery	\$ 1,315,500	\$ 1,669,318	\$ 1,517,484	\$ 12,922

\*Paid claims for prior policy years are cumulative and include runoff claims paid to date. Paid claims for the current policy year are cumulative to this point in time.

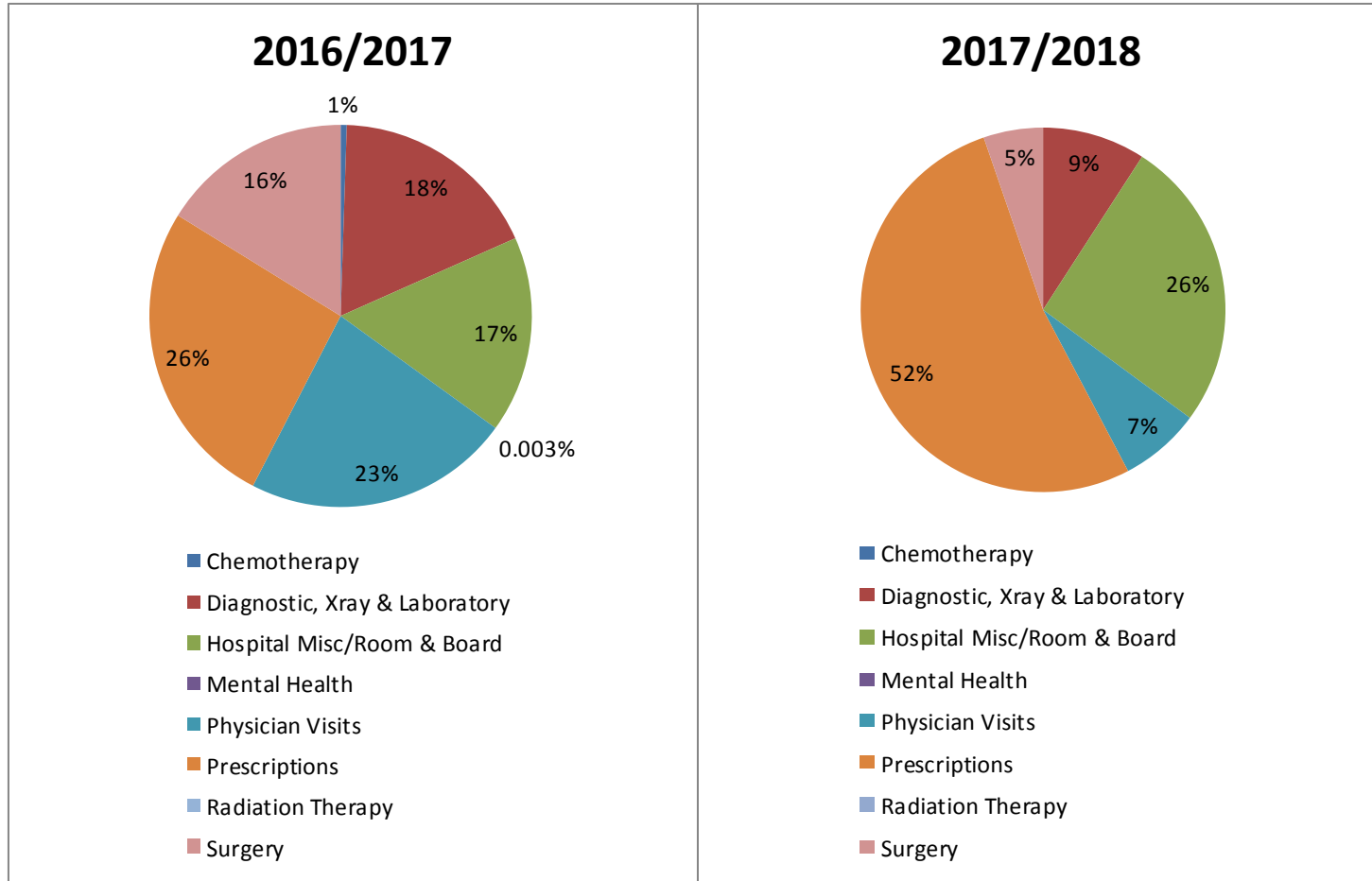
# Top Benefit Expenses



\* Paid claims for prior policy years are cumulative and include runoff claims paid to date. Paid claims for the current policy year are cumulative to this point in time.



# Top Benefit Expenses



\* Paid claims for prior policy years are cumulative and include runoff claims paid to date. Paid claims for the current policy year are cumulative to this point in time.





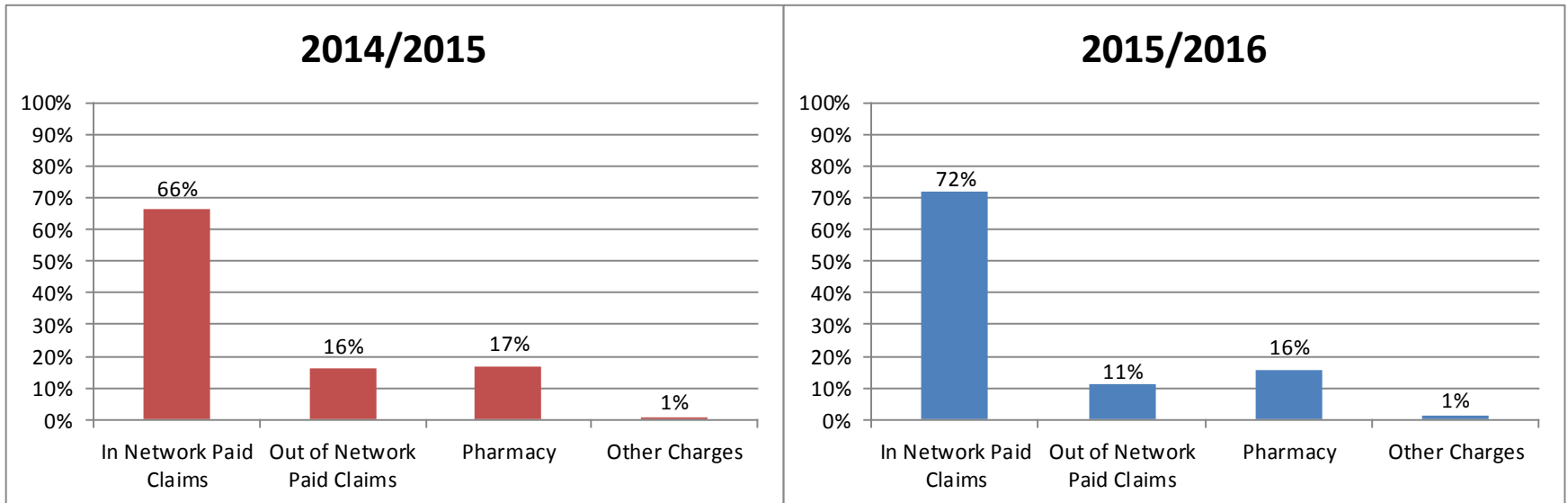
# In/Out of Network Data

<b>In/Out Network</b>	<b>2014/2015</b>	<b>2015/2016</b>	<b>2016/2017</b>	<b>2017/2018</b>
In Network Paid Claims	\$ 6,050,544	\$ 9,720,397	\$ 6,704,161	\$ 129,022
% of Total Paid Claims	66%	72%	62%	49%
Out of Network Paid Claims	\$ 1,475,457	\$ 1,508,525	\$ 1,406,844	\$ 6,316
% of Total Paid Claims	16%	11%	13%	2%
Pharmacy	\$ 1,536,479	\$ 2,146,864	\$ 2,460,346	\$ 128,416
% of Total Paid Claims	17%	16%	23%	48%
Other Charges	\$ 58,462	\$ 184,344	\$ 180,473	\$ 1,517
% of Total Paid Claims	1%	1%	2%	1%
	\$ 9,120,942	\$ 13,560,129	\$ 10,751,825	\$ 265,272
	100%	100%	100%	100%

\* Paid claims for prior policy years are cumulative and include runoff claims paid to date. Paid claims for the current policy year are cumulative to this point in time.



# Network Data 2014/15 to 2015/16

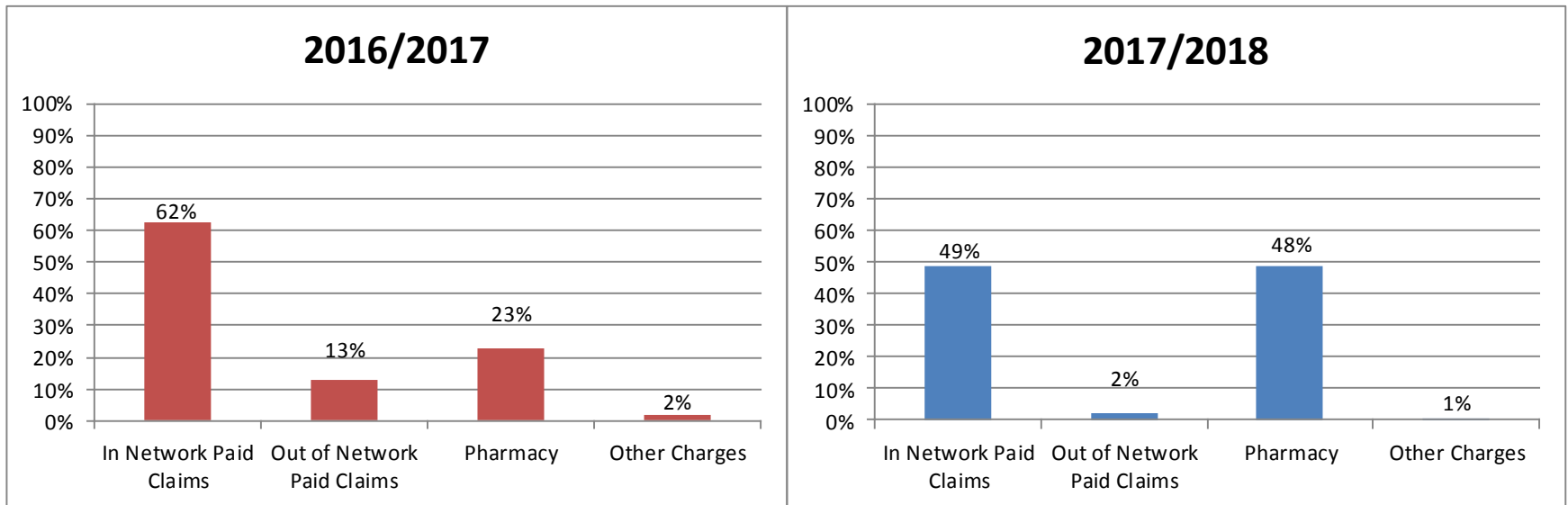


\* Paid claims for prior policy years are cumulative and include runoff claims paid to date. Paid claims for the current policy year are cumulative to this point in time.





# Network Data 2016/17 to 2017/18



\* Paid claims for prior policy years are cumulative and include runoff claims paid to date. Paid claims for the current policy year are cumulative to this point in time.



# 10. Amendment 1 Receipt Confirmation

RECEIPT CONFIRMATION

RFP # NS22-140

Amendment 01

Amendment 01 consists of the following:

1. Attachment 1 – Questions and Answers posted.
2. Updated RFP document posted (updates in red wording).
3. RFP Closing Date has been extended to October 25, 2022, 5pm MT.

-----End of Amendment-----

NOTE: *Return this signed and dated Amendment 01 Receipt Confirmation with your RFP response, otherwise, your proposal may be found non-responsive and given no further consideration.*

I confirm that I received and reviewed Amendment 01 for RFP #NS22-140.

  
Signature

10/24/2022  
Date

Peter Finney, GSH President  
Printed Name

# Attachment 3 - VPAT Exhibits



# GALLAGHER STUDENT HEALTH STANDARD DATA LAYOUT

V0.03

3/5/2021

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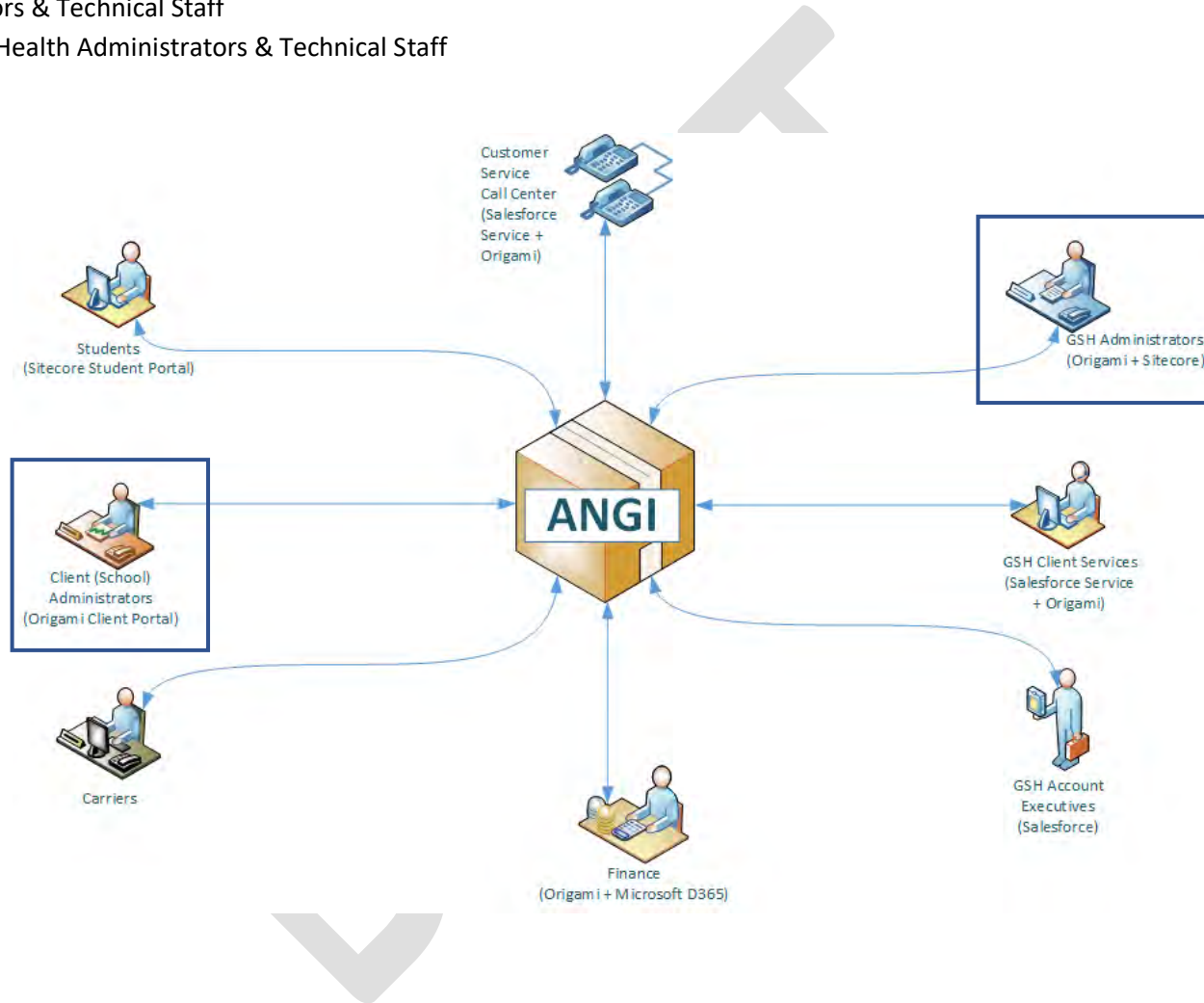
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## Intended Audience

The intended audience for this document is

- Client Administrators & Technical Staff
- Gallagher Student Health Administrators & Technical Staff



## Welcome to Gallagher Student Health!

We have designed an integrated environment for our clients, called ANGI.

ANGI stands for *Affinity Next Generation Implementation*. It is a collection of systems working together to provide unparalleled service and support to our clients and their students.

Gallagher Student Health has developed a Standard Data Layout so that we can provide world-class service to our clients and have a smooth implementation. We have found that having a standard data layout ensures that your student's and dependent's information uploads into the ANGI system without issues. That means that we can spend time focusing on what is most important to you and your students – providing the service that you deserve.

### What is involved in preparing the data?

We meet with you to review the data requirements. Our clients send us more than one file. Although the data requirements are the same, the purpose of the file may differ. For example:

- A Eligibility file gives us a list of students at your school who are eligible to enroll in coverage, or to waive coverage. This information is used to create Student Portal login accounts for eligible students. (Enroll / Waiver)
- If your school automatically enrolls students, the file is used to create Student Portal login accounts for students that are eligible to waive coverage. (Waiver Only)
- If your school sends an Update file, the way the file is used depends upon what rules you have asked us to follow. For example:
  - The Update Action is not a Full File – it adds new student records with coverages and updates coverages for existing student records.
  - The Update Action is a Full file - it adds new student records with coverages but terminates coverages for students whose records are not included.

The types of coverage are primarily Medical or Dental.

We work with you to review what rules might apply to the student records being imported. For example, students who live on-campus may be eligible for different coverages than students who are commuters.

Timeline for Preparing Data

Table 1: Preparation Activities prior to ANGI Go Live Date

Days before Go Live	Client's Activities	Gallagher Student Health Activities
Prior to 30 Days	Meet to discuss data and any rules needed to set up coverages correctly.	Define the rules as part of the ANGI data import process. These rules are specific to each client.
30 Days	Upload a Test file	Import the Test file. Review and resolve issues found.
10 Days	Upload a full Live file	Import the Live file. Review and resolve issues found.
Go Live	ANGI is Live	ANGI is Live

The illustration below shows the activity preparing for ANGI going live on May 31, 2021.



Figure 1: Timeline for Preparing Data with ANGI Go Live Date 5/31/2021

## Standard Data Layout Details

Table 2: Standard Data Layout Details

Field Name	Required Field (Y/N)	Max Length	Format	Definition
Student ID	Y	20	Text	Unique identifier for the student. <b>This cannot be changed.</b>
First Name	Y	50	Text	Subscriber's <sup>1</sup> or Dependent's first name
Middle Initial	N	1	Text	Subscriber's or Dependent's middle initial
Last Name	Y	50	Text	Subscriber's or Dependent's last name
Name Suffix	N	20	Text	The suffix is listed after the Student's or Dependent's name, and indicates the student holds a position, educational degree, accreditation, office, or honor (for example: <b>PhD, CCNA, OBE</b> ). Other examples are generational designations like "Sr." and "Jr." and "I", "II", "III", etc.
Gender	Y	1	Text	<b>M</b> = Male, <b>F</b> = Female, <b>U</b> = Unknown
Date of Birth	Y	8	Text	MM/DD/YYYY – The Subscriber's or Dependent's date of birth
Relationship Code	Y	2	Text	01 = Student (Self), 02 = Spouse/Domestic Partner, 03 = Child
Class Level	Y	1	Text	Class Level is required if the school separates students based on class level. See Class Level Codes on page 7.
Student Status	C <sup>2</sup>	2	Text	<b>FT</b> = Full Time, <b>PT</b> = Part Time
Origin	Y	3	Text	<b>DOM</b> = Domestic, <b>INT</b> = International
Student Category	C	50	Text	The Student Category is an optional field, which allows for additional information to be tracked, if needed. This is a custom field which requires discussion with the Gallagher Student Health Enrollment Team.
Email Address	Y	50	Text	Preferred email address on record
Telephone Number	N	20	Text	Student's Telephone number
Campus Information	C	50	Text	School specific Codes or Labels used to define campus or schools within a university system. The values sent must be defined and will be loaded in GSH systems to support file processing.
Expected Graduation Date	Y	8	Text	MM/DD/YYYY – The Student's expected graduation date
Local Address Line 1	Y	50	Text	Student's or Dependent's mailing address
Local Address Line 2	N	50	Text	Additional address information, such as apartment number, suite number etc.
Local Address Line 3	N	50	Text	Additional address information, such as apartment number, suite number etc.
Local City	Y	50	Text	City where the student or dependent resides
Local State	Y	2	Text	State where the student or dependent resides
Local Zip	Y	5	Text	Zip code where the student or dependent resides – ONLY USE U.S. zip codes
Local Zip Extension	N	10	Text	Last 4 digits of a 9 digit zip code
International Postage Code	N	10	Text	Foreign Address – use this for the postal code
Country	Y	20	Text	Supply the country use ISO3165 Standard code list <a href="https://www.iso.org/iso-3166-country-codes.html">https://www.iso.org/iso-3166-country-codes.html</a>

<sup>1</sup> Names can apply to the Student, Spouse, or Child<sup>2</sup> C – Conditional field, based on the client's data requirements

Field Name	Required Field (Y/N)	Max Length	Format	Definition
Coverage Status Code	Y	6	Text	SO, SP, SP/Child, etc. See Coverage Status Codes on page 6
Effective Date	Y	8	Text	MM/DD/YYYY – The first date of the coverage period
Termination Date	Y	8	Text	MM/DD/YYYY – The last date of the coverage period
Coverage Period	Y	20	Text	The name or description of the period of coverage requested (for example: Annual, Fall, Spring, Summer, Winter, etc.) School specific Codes or Labels used to define period of coverage in the Insurance plan. The values sent need to be defined and will be loaded in GSH systems to support file processing.
Premium Amount	N	10	Text	Format (9999999.99)
Update Action <sup>3</sup>	Y	1	Text	<b>A</b> = Add/Update Coverage, <b>D</b> = Drop Coverage
School				School Name
Coverage				Coverage that the import is for. For example: Medical, Vision, Dental
Record Type				<b>Eligibility</b> – Records are for Students that are Eligible to Enroll <b>Enrollment</b> – Records are for Students that are Enrolled
Email Address Secondary	N			The Student's secondary email address
Matriculation Date	N	8	Text	MM/DD/YYYY – The Student's graduation date
Appointment Date	N	8	Text	MM/DD/YYYY – The date that a Student was appointed to a position (applies to post-graduate students)
Appointment Term Date	N	8	Text	MM/DD/YYYY – The date that a Student's appointed position ended
COBRA Eligible Start Date	N	8	Text	MM/DD/YYYY – The first date that a Student is eligible to apply for COBRA insurance coverage
COBRA Eligible End Date	N	8	Text	MM/DD/YYYY – The last date that a Student is eligible to apply for COBRA insurance coverage
Program Year	N			Academic Year that the program applies to
School Funded	N			Indicates if enrollment is paid for by the school
Student Account Code	N			School account code for a student ??? Is this an accounting subaccount?
Student ID Secondary	N			This is a second unique identifier for the student – this is an infrequent occurrence which may occur if the same student is enrolled in multiple schools in a University.
Bursar Term	N			Bursar term code, if used by the school
Registration Type	N			Registration Type - This is a custom field which requires discussion with the Gallagher Student Health Enrollment Team
Insurance Elig	N			<b>Y</b> or <b>N</b> - Indicates if the Student is eligible to enroll in insurance
Insurance Auto Enroll	N			<b>Y</b> or <b>N</b> - Indicates if the student is automatically enrolled by an Eligibility file
Health Fee Elig	N			<b>Y</b> or <b>N</b> - Indicates if the student is eligible for Grant Assistance with Health Plan Costs
Health Fee Auto Enroll	N			<b>Y</b> or <b>N</b> - Indicates if the student is automatically enrolled using Grant Assist, by an Eligibility file
Waiver Elig	N			<b>Y</b> or <b>N</b> - Indicates if the student is eligible to waive coverage
Bursar Billable	N			<b>Y</b> or <b>N</b> - Indicates if the student is billed by the school's Bursar
School Attribute 1	N			This information is provided on the school eligibility file.

<sup>3</sup> Updating applies to Eligibility/Coverage

Field Name	Required Field (Y/N)	Max Length	Format	Definition
School Attribute 2	N			This information is provided on the school eligibility file.
School Attribute 3	N			This information is provided on the school eligibility file.
School Attribute 4	N			This information is provided on the school eligibility file.
CarrierClassCode	N			Carrier Classification Codes are used for sending information to the carrier. They must meet the carrier's requirements for the outbound file.
SchoolClassCode	N			School Classification Codes are used to identify different student populations who have: <ul style="list-style-type: none"> <li>Different Start and End Dates</li> <li>Different Premiums</li> </ul> These codes are defined by each school
Subscriber ID	N			This is the Insurance Carrier's Subscriber ID for coverage that has been assigned to the student or the student's dependent

## Definitions

Table 3: Definitions of Information Requested

Information requested	Description
Student	Refers to the student that the benefit is offered to – also known as the Primary Subscriber
Dependent	Dependents include spouse and children associated with the primary subscriber
Field Name (Column)	The various categories of information we request from our schools
Required Field (column)	This column categorizes each piece of information as required information (Y), not required information (N), or conditional (C), meaning that some groups will need to provide that information and others will not. The "conditions" are outlined in the definition column.
Maximum Length (column)	This is the maximum number of character, or positions, allowed for each piece of data
Definitions (column)	A brief description of the requested information

## Student ID Requirements

1. The student's identification number **must be a unique number for each student** to retain correct historical claim information.
2. The student's identification number **must never change or be reused**. No parentheses, dashes or other separator values are permitted.

## Dependent ID Requirements

Table 4: Dependent ID Requirements

Field	Description
-------	-------------

Dependent ID Number	The subscriber's student ID number
Relationship	<b>01</b> (Subscriber), <b>02</b> (Spouse), <b>03</b> (Child) Dependent Information must be listed right after the subscriber's information so that it is processed properly.

*Example*

In this example, John Smith is the Student. His spouse is Nicole Smith, and his child is John Smith Jr.

Student ID	First Name	Last Name	Relationship
123456789	John	Smith	01 Subscriber
123456789	Nicole	Smith	02 Spouse
123456789	John	Smith Jr.	03 Child

## Coverage Status Codes

Coverage Status Codes describe what level of coverage a student has. They are as follows:

Code	Description
SO	Student Only
SP	Spouse
C	Child
F	Family
AC	All Children
SP/C	Spouse/Child
S>25	Student 25 & over



## Class Level Codes

Class Level Codes describes what category of the student population applies to the Student and is used to assign coverage for the student. They are as follows:

Class Level File Code	Class Level Description
C	CPS
DN	Dental
D	Doctoral
F	Fellow
G	Graduate
J	Jesuit Theology
L	Law
MA	Master
M	Medical
O	Other
PA	Physician Assistant
P	Professional
T	Theology
U	Undergraduate

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File Format

- **The file format should be comma separated values (CSV)**
- The data file should have column field names in row 1.
- Enclose address fields in double quotes. For example: "500 Main Street"
- Client should indicate end of line used "LF" - typically Linux/MacOS or "CRLF" - typically Windows generated files

File Naming Conventions

**File names must remain consistent throughout the enrollment period.**

**Requested Name:** **School\_Uniqueidentifier\*\_Coveragetype\_filetype\_coverageperiod**

\*Unique identifiers are only required when separate files are being sent for different student populations

**Example 1:** SchoolName\_INT\_Medical\_Full\_Annual2021 This is a Full file for enrolling International students in the Medical Plan for Annual coverage starting in 2021

**Example 2:** SchoolName\_Eligibility\_Adds\_Fall2021 This is an Eligibility file for importing student records for Fall coverage starting in 2021

Coverage Types	File Types	Description
Eligibility	Full	School sends entire population in each file; enrolled students for the coverage period who are not present in the file can be optionally terminated
Medical	Update	School sends population with appropriate Update Action - "A" = Add/Update Coverage OR "D" = Drop Coverage
Dental		

You may add additional information to the file name after the requested naming convention

**Example:** School\_Uniqueidentifier\_Eligibility\_Adds\_Fall2020\_10152020\_

## Examples of Common Scenarios

Scenario for Waiver Only

Scenario for Auto Enroll

Scenario for Creating Eligible Student Records

*This should have records that are being imported for eligibility.*

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## Scenario for Updating Student Records -- Adding and Removing Coverage

You can add and remove coverage in the same import file.

The sample data includes these records:

- John Smith has a spouse, Nicole, and a son, John Jr.
  - Three records are created, all associated with John's Student ID
  - Information specific to John Senior appears in the fields that are not required
  - John has his family **enrolled** in Annual Coverage
  
- Jennifer Jones is a single student.
  - She is **enrolled** in Annual coverage
  
- Marcia Palm is a single student.
  - She is a Part Time International student
  - She is **dropping** the Annual Coverage because she has obtained MassHealth insurance coverage
  
- Jim Bowman has a spouse, Agatha
  - Two records are created, associated with Jim's Student ID
  - Information specific to Jim appears in the fields that are not required
  - Jim and his wife are **enrolled** in Annual Coverage
  
- Samantha Wells has a spouse, Joseph Ellsen, and has recently gotten divorced
  - Two records are created, associated with Samantha's Student ID
  - Information specific to Samantha appears in the fields that are not required
  - Samantha and her husband are enrolled in Annual Coverage
  - The **coverage** for Samantha's ex-husband is being dropped
  
- Anna Brown is a single student
  - She is a Full Time International student
  - She is enrolled in Annual Coverage

Field Name	John Smith, Student	Nicole Smith, Spouse	John Smith Jr., Child	Jennifer Jones, Student	Marcia Palm, Student	Jim Bowman, Student	Agatha Bowman, spouse	Samantha Wells, Student	Joseph Ellsen, Former spouse	Anna Brown, Student
Student ID	123456789	123456789	123456789	123468992	987301158	204789036	204789036	589346687	589346687	154325541
First Name	John	Nicole	John	Jennifer	Marcia	Jim	Agatha	Samantha	Joel	Anna
Middle Initial										
Last Name	Smith	Smith	Smith Jr.	Jones	Palm	Bowman	Bosman	Wells	Ellsen	Brown
Gender	M	F	M	F	F	M	F	F	M	F
Date of Birth	04/22/1995	05/25/1997	8/21/2020	1/19/2002	08/22/2001	03/15/2001	02/01/2002	05/02/1991	07/03/1990	05/15/1985
Relationship Code	01	02	03	01	01	01	02	01	02	01
Class Level	G	O	O	U	U	U	O	G	O	G
Student Status	FT			FT	PT	FT				
Origin	DOM	DOM	DOM	DOM	INT	DOM	DOM	DOM	DOM	INT
Student Category										
Email Address	Jsmith@other.edu	Jsmith@other.edu	JSmith@other.edu	jjJones@other.edu	MPalm@other.edu	Jbowman@other.edu	Jbowman@other.edu	Swells@other.edu	Swells@other.edu	Abrown@other.edu
Telephone Number										
Campus Information	Lowell			Boston	Amherst	Dartmouth		Worcester		Worcester
Expected Graduation Date	06/15/2022			06/15/2024	06/15/2024	06/15/2022		06/15/2023		06/15/2022
Local Address Line 1	7 Main St.	7 Main St.	7 Main St.	220 Prospect St.	170 E Hadley Rd	33 Forest St.	33 Forest St.	232 N Wells St.	232 N Wells St.	8 Main St.
Local Address Line 2	Apt. 22	Apt. 22	Apt. 22	Apt 2	Apt 88			Apt 25	Apt 25	
Local Address Line 3										
Local City	Springfield	Springfield	Springfield	Waltham	Amherst	St. Louis	St. Louis	Chicago	Chicago	Telford
Local State	MA	MA	MA	MA	MA	MO	MO	IL	IL	PA
Local Zip	01020	01020	01020	02453	01002	63111	63111	60614	60614	18969
Local Zip Extension										
International Postage Code										

Field Name	John Smith, Student	Nicole Smith, Spouse	John Smith Jr., Child	Jennifer Jones, Student	Marcia Palm, Student	Jim Bowman, Student	Agatha Bowman, spouse	Samantha Wells, Student	Joseph Ellsen, Former spouse	Anna Brown, Student
Country	United States	United States	United States	United States	United States	United States	United States	United States	United States	United States
Coverage Status Code	SO	SP	C	SO	SO	SO	SO	SO	SP	SO
Effective Date	08/01/2021	08/01/2021	08/01/2021	02/01/2021	08/01/2021	08/01/2021	08/01/2021	08/01/2021	08/01/2021	08/01/2021
Termination Date	07/31/2022	07/31/2022	07/31/2022	07/31/2022	07/31/2022	07/31/2022	07/31/2022	07/31/2022	07/31/2022	07/31/2022
Coverage Period	Annual	Annual	Annual	Annual	Annual	Annual	Annual	Annual	Annual	Annual
Premium Amount										
Update Action	A	A	A	A	D	A	A	A	D	A
School	Sample University	Sample University	Sample University	Sample University	Sample University	Sample University	Sample University	Sample University	Sample University	Sample University
Coverage	Medical	Medical	Medical	Medical	Medical	Medical	Medical	Medical	Medical	Medical
RecordType	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment	Enrollment
Email Address Secondary										
Matriculation Date										
Appointment Date										
Appointment Term Date										
COBRA Eligible Start Date										
COBRA Eligible End Date										
Program Year										
School Funded										
Student Account Code										
Student ID Secondary										
Bursar Term										
Registration Type										

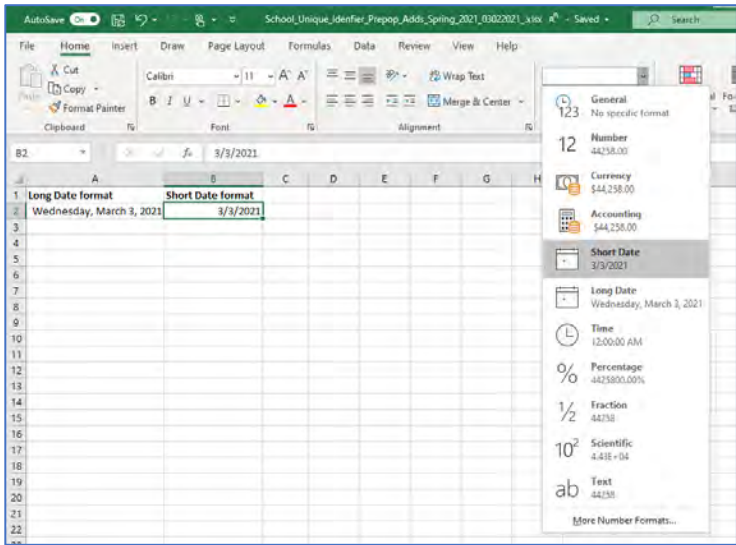
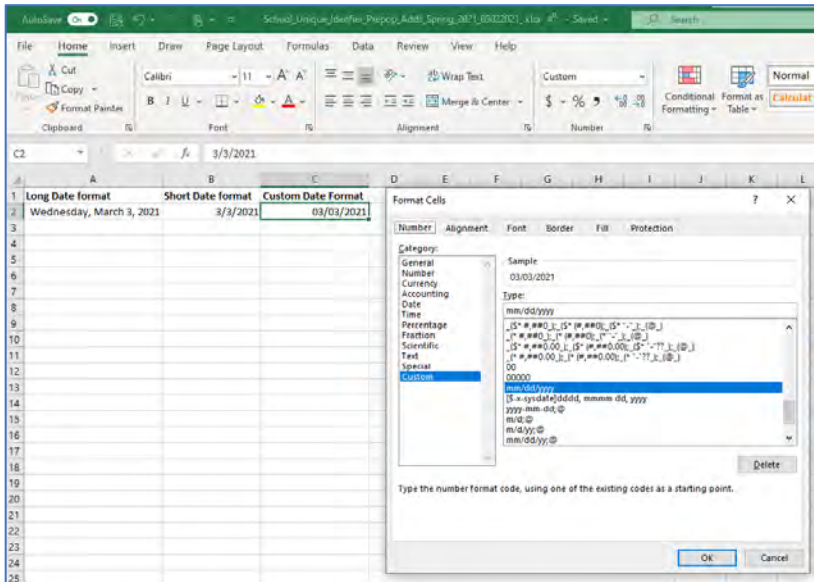
Field Name	John Smith, Student	Nicole Smith, Spouse	John Smith Jr., Child	Jennifer Jones, Student	Marcia Palm, Student	Jim Bowman, Student	Agatha Bowman, spouse	Samantha Wells, Student	Joseph Ellsen, Former spouse	Anna Brown, Student
Insurance Elig										
Insurance Auto Enroll										
Health Fee Elig										
Health Fee Auto Enroll										
Waiver Elig										
Bursar Billable										
School Attribute 1										
School Attribute 2										
School Attribute 3										
School Attribute 4										
CarrierClassCode										
SchoolClassCode										
Subscriber ID										





CSV Example for Preparing the Data File

These Screen Shots show the information in Excel. Note that the dates are formatted using a custom format of MM/DD/YYYY so that leading zeros are included in the data. For example:

Standard Date Formats in Excel	Custom Date Format in Excel
 <p>This screenshot shows the Excel ribbon with the 'Number' group selected. The 'Short Date' format is chosen from the dropdown menu. The spreadsheet shows two columns: 'Long Date format' with the value 'Wednesday, March 3, 2021' and 'Short Date format' with the value '3/3/2021'.</p>	 <p>This screenshot shows the 'Format Cells' dialog box in Excel. The 'Custom' category is selected, and the 'Type' field contains the custom date format '03/03/2021'. The spreadsheet in the background shows the date '03/03/2021' in the 'Custom Date Format' column.</p>

Address information should include open and closed quotes— for example, **15 June Rd, East** should appear as “15 June Rd, East”

A CSV file uses the commas to indicate a new field, unless quotes are used to show that the contents between the quotes are for a particular field and do not indicate the start of the next field.

Gallagher Student Health Standard Data Layout

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
1	StudentID	FirstName	MiddleInitial	LastName	Gender	DateOfBirth	RelationshipCode	ClassLevel	StudentStatus	Origin	StudentCategory	EmailAddress	Telephonenumber	CampusInformation	ExpectedGraduationDate	LocalAddressLine1	LocalAddressLine2	LocalAddressLine3
2	123456789	John		Smith	M	04/22/1995	01 G		FT	DOM		Jsmith@other.edu		Lowell	06/15/2022	7 Main St.		Apt. 22
3	1234567892	Nicole		Smith	F	05/25/1997	02 O			DOM		Jsmith@other.edu				7 Main St.		Apt. 22
4	1234567893	John		Smith Jr.	M	08/21/2020	03 O			DOM		Jsmith@other.edu				7 Main St.		Apt. 22
5	123468992	Jennifer		Jones	F	01/19/2002	01 U	FT		DOM		jjJones@other.edu		Boston	06/15/2024	220 Prospect St.		Apt 2
6	987301158	Marcia		Palm	F	08/22/2001	01 U	PT	INT			MPalm@other.edu		Amherst	06/15/2024	170 E Hadley Rd		Apt 88
7	204789036	Jim		Bowman	M	03/15/2001	01 U	FT		DOM		Jbowman@other.edu		Dartmouth	06/15/2022	33 Forest St.		
8	2047890364	Agatha		Bosman	F	02/01/2002	02 O			DOM		Jbowman@other.edu				33 Forest St.		
9	589346687	Samantha		Wells	F	05/02/1991	01 G	FT		DOM		Swells@other.edu		Worcester	06/15/2023	232 N Wells St.		Apt 25
10	5893466875	Joel		Ellsen	M	07/03/1990	02 O			DOM		Swells@other.edu				232 N Wells St.		Apt 25
11	154325541	Anna		Brown	F	05/15/1985	01 G	FT	INT			Abrown@other.edu		Worcester	06/15/2022	8 Main St.		

Figure 2: Excel Columns A through P

Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	
1	Local Address Line 1	Local Address Line 2	Local Address Line 3	Local City	Local State	Local Zip	Local Zip Extension	International Postal Code	Country	Coverage Status Code	Effective date	Termination Date	Coverage Period	Premium Amount	Update Action	School	Coverage
2	7 Main St.	Apt. 22		Springfield	MA	01020			United States	SO	44409	44773	Annual		A	Sample University	Medical
3	7 Main St.	Apt. 22		Springfield	MA	01020			United States	SP	44409	44773	Annual		A	Sample University	Medical
4	7 Main St.	Apt. 22		Springfield	MA	01020			United States	C	44409	44773	Annual		A	Sample University	Medical
5	220 Prospect St.	Apt 2		Waltham	MA	02453			United States	SO	44228	44773	Annual		A	Sample University	Medical
6	170 E Hadley Rd	Apt 88		Amherst	MA	01002			United States	SO	44409	44773	Annual		D	Sample University	Medical
7	33 Forest St.			St. Louis	MO	63111			United States	SO	44409	44773	Annual		A	Sample University	Medical
8	33 Forest St.			St. Louis	MO	63111			United States	SO	44409	44773	Annual		A	Sample University	Medical
9	232 N Wells St.	Apt 25		Chicago	IL	60614			United States	SO	44409	44773	Annual		A	Sample University	Medical
10	232 N Wells St.	Apt 25		Chicago	IL	60614			United States	SP	44409	44773	Annual		D	Sample University	Medical
11	8 Main St.			Telford	PA	18969			United States	SO	44409	44773	Annual		A	Sample University	Medical

Figure 3: Excel Columns Q through AG

AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	
1	RecordType	EmailAddressSecondary	MatriculationDate	AppointmentDate	AppointmentTermDate	COBRAEligibleStartDate	COBRAEligibleEndDate	ProgramYear	SchoolFunded	StudentAccountCode	StudentIDSecondary	BursarTerm	RegistrationType	InsuranceElig	InsuranceAutoEnroll
2	Enrollment														
3	Enrollment														
4	Enrollment														
5	Enrollment														
6	Enrollment														
7	Enrollment														
8	Enrollment														
9	Enrollment														
10	Enrollment														
11	Enrollment														

Figure 4: Excel Columns AH through AV

	AW	AX	AY	AZ	BA	BB	BC	BD	BE	BF	BG
1	HealthFeeElig	HealthFeeAutoEnroll	WaiverElig	BursarBillable	SchoolAttribute1	SchoolAttribute2	SchoolAttribute3	SchoolAttribute4	CarrierClassCode	SchoolClassCode	SubscriberID
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											

Figure 5: Excel Columns AW through BG

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Exporting a Spreadsheet to CSV

Export the spreadsheet to CSV format:

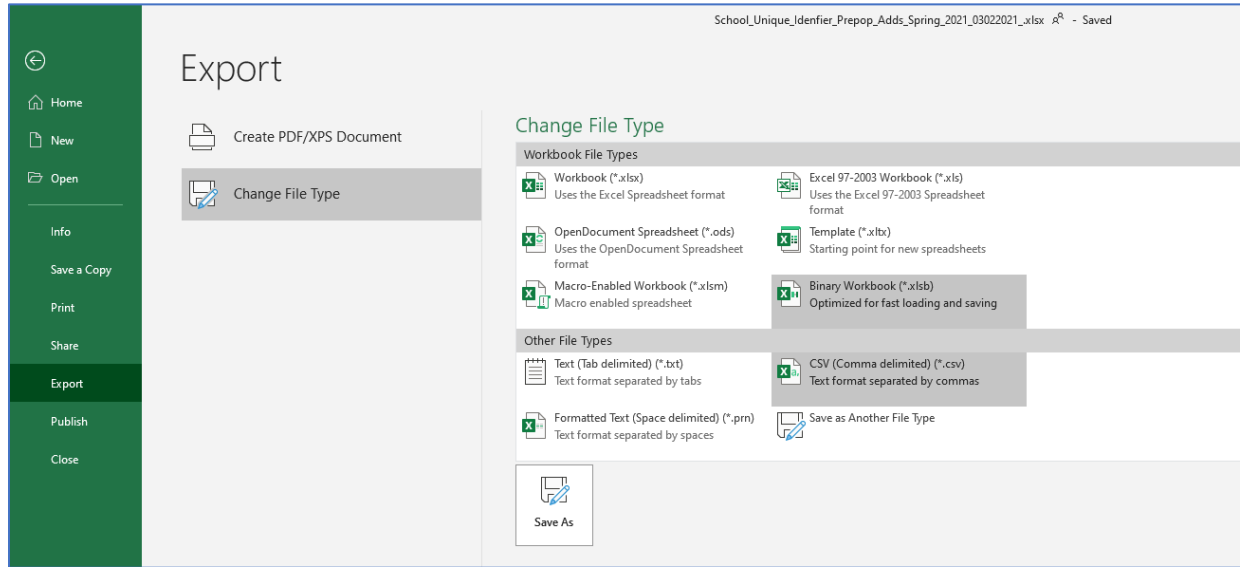


Figure 6: Export Spreadsheet to CSV File Type

After exporting to CSV, **only use a text editor like Notepad** to review the file.

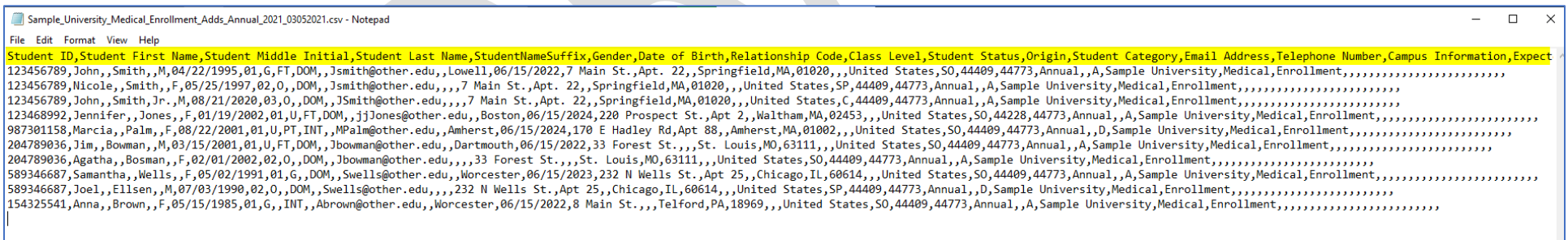


Figure 7: Sample CSV File Display in Notepad

The first line of a CSV file is the names of the fields. The second line and following contain the data.

## Sample Files:

- School\_Unique\_Identifier\_Extended\_Eligibility\_Adds\_Annual\_2021\_03052021\_CSV\_Publish 2021-03-05.pdf
- School\_Unique\_Identifier\_Extended\_Eligibility\_Adds\_Annual\_2021\_03052021\_Excel\_Publish 2021-03-05.pdf

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Student ID	Student First Name	Student Middle Initial	Student Last Name	StudentNameSuffix	Gender	Date of Birth	Relationship Code	Class Level	Student Status	Origin	Student Category	Email Address
123456789	John		Smith		M	04/22/1995	01	G	FT	DOM		Jsmith@other.edu
123456789	Nicole		Smith		F	05/25/1997	02	O		DOM		Jsmith@other.edu
123456789	John		Smith	Jr.	M	08/21/2020	03	O		DOM		JSmith@other.edu
123468992	Jennifer		Jones		F	01/19/2002	01	U	FT	DOM		jjJones@other.edu
987301158	Marcia		Palm		F	08/22/2001	01	U	PT	INT		MPalm@other.edu
204789036	Jim		Bowman		M	03/15/2001	01	U	FT	DOM		Jbowman@other.edu
204789036	Agatha		Bosman		F	02/01/2002	02	O		DOM		Jbowman@other.edu
589346687	Samantha		Wells		F	05/02/1991	01	G		DOM		Swells@other.edu
589346687	Joel		Ellsen		M	07/03/1990	02	O		DOM		Swells@other.edu
154325541	Anna		Brown		F	05/15/1985	01	G		INT		Abrown@other.edu

Telephone Number	Campus Information	Expected Graduation Date	Local Address Line 1	Local Address Line 2	Local Address Line 3	Local City	Local State	Local Zip	Local Zip Extension	International Postal Code
	Lowell	06/15/2022	7 Main St.	Apt. 22		Springfield	MA	01020		
			7 Main St.	Apt. 22		Springfield	MA	01020		
			7 Main St.	Apt. 22		Springfield	MA	01020		
	Boston	06/15/2024	220 Prospect St.	Apt 2		Waltham	MA	02453		
	Amherst	06/15/2024	170 E Hadley Rd	Apt 88		Amherst	MA	01002		
	Dartmouth	06/15/2022	33 Forest St.			St. Louis	MO	63111		
			33 Forest St.			St. Louis	MO	63111		
	Worcester	06/15/2023	232 N Wells St.	Apt 25		Chicago	IL	60614		
			232 N Wells St.	Apt 25		Chicago	IL	60614		
	Worcester	06/15/2022	8 Main St.			Telford	PA	18969		

Country	Coverage Status Code	Effective date	Termination Date	Coverage Period	Premium Amount	Update Action	School	Coverage	RecordType	EmailAddressSecondary
United States	SO	44409	44773	Annual		A	Sample University	Medical	Enrollment	
United States	SP	44409	44773	Annual		A	Sample University	Medical	Enrollment	
United States	C	44409	44773	Annual		A	Sample University	Medical	Enrollment	
United States	SO	44228	44773	Annual		A	Sample University	Medical	Enrollment	
United States	SO	44409	44773	Annual		D	Sample University	Medical	Enrollment	
United States	SO	44409	44773	Annual		A	Sample University	Medical	Enrollment	
United States	SO	44409	44773	Annual		A	Sample University	Medical	Enrollment	
United States	SO	44409	44773	Annual		A	Sample University	Medical	Enrollment	
United States	SP	44409	44773	Annual		D	Sample University	Medical	Enrollment	
United States	SO	44409	44773	Annual		A	Sample University	Medical	Enrollment	



MatriculationDate	AppointmentDate	AppointmentTermDate	COBRAEligibleStartDate	COBRAEligibleEndDate	ProgramYear	SchoolFunded	StudentAccountCode	StudentIDSecondary	BursarTerm

RegistrationType	InsuranceElig	InsuranceAutoEnroll	HealthFeeElig	HealthFeeAutoEnroll	WaiverElig	BursarBillable	SchoolAttribute1	SchoolAttribute2	SchoolAttribute3	SchoolAttribute4	CarrierClassCode

SchoolClassCode	SubscriberID

The first line in a CSV file is the header.

Student ID,Student First Name,Student Middle Initial,Student Last Name,StudentNameSuffix,Gender,Date of Birth,Relationship Code,Class Level,Student Status,Origin,Student Category,Email Address,Telephone Number,Campus Information,Expected Graduation Date,Local Address Line 1,Local Address Line 2,Local Address Line 3,Local City,Local State,Local Zip,Local Zip Extension,International Postal Code,Country,Coverage Status Code,Effective date,Termination Date,Coverage Period,Premium Amount,Update Action,School,Coverage,RecordType,EmailAddressSecondary,MatriculationDate,AppointmentDate,AppointmentTermDate,COBRAEligibleStartDate,COBRAEligibleEndDate,ProgramYear,SchoolFunded,StudentAccountCode,StudentIDSecondary,BursarTerm,RegistrationType,InsuranceElig,InsuranceAutoEnroll,HealthFeeElig,HealthFeeAutoEnroll,WaiverElig,BursarBillable,SchoolAttribute1,SchoolAttribute2,SchoolAttribute3,SchoolAttribute4,CarrierClassCode,SchoolClassCode,Subscriber ID

This is Record 1 123456789,John,,Smith,,M,04/22/1995,01,G,FT,DOM,,Jsmith@other.edu,,Lowell,06/15/2022,7 Main St.,Apt. 22,,Springfield,MA,01020,,,United States,SO,44409,44773,Annual,,A,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 2 123456789,Nicole,,Smith,,F,05/25/1997,02,O,,DOM,,Jsmith@other.edu,,,,7 Main St.,Apt. 22,,Springfield,MA,01020,,,United States,SP,44409,44773,Annual,,A,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 3 123456789,John,,Smith,Jr.,M,08/21/2020,03,O,,DOM,,JSmith@other.edu,,,,7 Main St.,Apt. 22,,Springfield,MA,01020,,,United States,C,44409,44773,Annual,,A,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 4 123468992,Jennifer,,Jones,,F,01/19/2002,01,U,FT,DOM,,jjJones@other.edu,,Boston,06/15/2024, 220 Prospect St.,Apt 2,,Waltham,MA,02453,,,United States,SO,44228,44773,Annual,,A,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 5 987301158,Marcia,,Palm,,F,08/22/2001,01,U,PT,INT,,MPalm@other.edu,,Amherst,06/15/2024,170 E Hadley Rd,Apt 88,,Amherst,MA,01002,,,United States,SO,44409,44773,Annual,,D,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 6 204789036,Jim,,Bowman,,M,03/15/2001,01,U,FT,DOM,,Jbowman@other.edu,,Dartmouth,06/15/2022,3 3 Forest St.,,St. Louis,MO,63111,,,United States,SO,44409,44773,Annual,,A,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 7 204789036,Agatha,,Bosman,,F,02/01/2002,02,O,,DOM,,Jbowman@other.edu,,,,33 Forest St.,,St. Louis,MO,63111,,,United States,SO,44409,44773,Annual,,A,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 8 589346687,Samantha,,Wells,,F,05/02/1991,01,G,,DOM,,Swells@other.edu,,Worcester,06/15/2023, 232 N Wells St.,Apt 25,,Chicago,IL,60614,,,United States,SO,44409,44773,Annual,,A,Sample University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

This is Record 9 589346687,Joel,,Ellsen,,M,07/03/1990,02,0,,DOM,,Swells@other.edu,,,,232 N Wells St.,Apt  
25,,Chicago,IL,60614,,,United States,SP,44409,44773,Annual,,D,Sample  
University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,  
This is Record 10 154325541,Anna,,Brown,,F,05/15/1985,01,G,,INT,,Abrown@other.edu,,Worcester,06/15/2022,8  
Main St.,,,Telford,PA,18969,,,United States,SO,44409,44773,Annual,,A,Sample  
University,Medical,Enrollment,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

# Gallagher VPAT - October 2021

Redacted

## Gallagher at a glance

Gallagher has been designing solutions to meet our clients' unique needs for more than 90 years. We pioneered many of the innovations in risk management used by businesses in all industries today. We believe that the best environment for learning and growing is one that remembers the past and invents the future. Gallagher has divisions specializing in retail insurance brokerage operations, benefits and HR consulting, wholesale distributions and third-party administrations and claims processing.

As one of the largest insurance brokers in the world, Gallagher has approximately 700 offices in 33 countries and provides client-service capabilities in more than 150 countries around the world through our network of partners. Wherever you are – we're nearby.

Lyndsay Paparo  
500 Victory Road  
Quincy, MA 02171  
Lyndsay\_Paparo@ajg.com  
gallagherstudent.com

**Quotation for Graduate/ International Students**

Boise State University  
Student Health Insurance Programs  
2023-2024 Final Renewal Quotations

February 20, 2023 **CONSENT - BAHR**



# 2023-2024 Recommendation

Carrier Name: Aetna

	2022-2023 Final Annual Rate	2023-2024 Final Annual Rate	% Change to Expiring Rate	\$ Change to Expiring Rate
<b>Graduate Assistants</b>	<b>\$3,745</b>	<b>\$3,056</b>	<b>-18.40%</b>	<b>-\$689</b>

- Maintains current plan design:
- \$1,250/\$2,500 deductible
- 80%/60% coinsurance
- \$100 Copay then 80%
- \$25/\$45/\$75/\$75
- No dependent coverage
- Includes sports accident coverage

**Estimate: 500 students at \$3,056 = \$1,528,000**

	2022-2023 Final Annual Rate	2023-2024 Final Annual Rate	% Change to Expiring Rate	\$ Change to Expiring Rate
<b>International Students</b>	<b>\$1,704</b>	<b>\$1,704</b>	<b>0%</b>	<b>\$0.00</b>

- Moves program to a fully ACA compliant plan:
- \$250/\$500
- 90%/70%
- \$25 then 100%/70%
- \$100 then 90%
- \$25/\$45/\$75
- Includes dependent coverage/Includes sports accident coverage

**Estimate: 160 students at \$1,704 = \$274,000**

## 2023-2024 Summary Recommendation:

- Move program to Aetna Student Health for most competitive and comprehensive terms
  - ✓ One risk pool
  - ✓ One provider network
  - ✓ Fully ACA compliant plan for both student populations
  - ✓ Sports accident coverage for both student populations
  - ✓ Ease of administration
  - ✓ More negotiating power in the carrier marketplace
  
- Keep rates and benefits separated: ✓ **Graduate Assistants:**
  - ✓ Maintain current benefit design
  - ✓ Annual student rate: \$3,056
  - ✓ ***Achieves \$334,165 annual premium savings to the University!***
  
  - ✓ **International Students:**
    - ✓ Move to fully ACA compliant plan with stronger benefit coverage
    - ✓ Addition of sports accident coverage
    - ✓ Annual student rate: \$1,704
    - ✓ ***Achieves flat renewal (no change in cost) for international students!***

# Boise State University

1910 University Drive  
Boise, ID 83725

Presented: February 28, 2023  
Effective: July 1, 2023

ATTACHMENT 3



Student Health &  
Special Risk

**Quotation for Athletics**

# 2023-2024 Athletic Accident Insurance Proposal

## Premium & Paid Claims History

**Basic Intercollegiate Athletic Accident Policy**  
Paid Claims as of January 31, 2022

**Kelly Eisenbies**  
Vice President

Gallagher Special Risk  
500 Victory Road  
Quincy, MA 02171

Kelly\_Eisenbies@ajg.com

**CONSENT - BAH**

**Chris Foti**  
Account Manager

Gallagher Special Risk  
500 Victory Road  
Quincy, MA 02171

Chris\_Foti@ajg.com

**TAB 3 Page 1**

Policy Year	Attachment Point	Stop Loss Premium	Paid Claims
2016-2017	\$985,000	\$105,883	\$369,335
2017-2018	\$625,000	\$79,832	\$625,439
2018-2019	\$525,000	\$69,900	\$531,806
2019-2020	\$506,000	\$64,660	\$351,597
2020-2021	\$565,000	\$62,074	\$405,746
2021-2022	\$565,000	\$62,074	\$217,885
2022-2023 <sup>1</sup>	\$565,000	\$62,074	\$51,187

1. Paid claims for the current policy year are not complete and considered to be immature at this point in time

# Premium Quotation – SIR Design

Insurance Carrier: Mutual of Omaha Insurance Company  
2023-2024 Premium

## Intercollegiate Athletic Accident Insurance Accident Medical Expense - \$90,000 per Injury Deductible - \$0 per Injury

2023-2024 Self-Insured Retention (SIR) Quote	
Aggregate Deductible	\$565,000
Stop Loss Premium	\$53,591
Claims Administration Fee	\$45,200
Gallagher Brokerage Fee	\$25,000
<b>TOTAL FIXED COST</b>	<b>\$123,791</b>
<b>MAXIMUM POTENTIAL COST</b>	<b>\$688,791</b>

**NOTE:** The information contained in this proposal is only an outline of the benefits offered. It is NOT a complete explanation of the policy provisions or specifics of the policy benefits. No coverage is extended via this proposal and no representations are made other than what is stated in the policy. To review a complete description of the program coverage, exclusions, and benefits, please contact us for a specimen copy of the policy.

**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Micron Center for Materials Research (MCMR) – Metal Organic Chemical Vapor Phase Deposition (MOCVD) – Construction and Installation

**REFERENCE**

December 2021 Idaho State Board of Education (Board) approved the purchase of Aixtron Metal Organic Chemical Vapor Phase Epitaxy system

April 2023 Six-Year Capital Plan Amendment (concurrent)

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.K

**BACKGROUND/DISCUSSION**

When the Boise State University Micron Center for Materials Research building was constructed in 2019, multiple lab spaces were shelled so they could be built-to-suit at a later date. Lab spaces 125/127 were designated for future buildout of an Aixtron Metal Organic Chemical Vapor Phase Epitaxy system (“Aixtron system”) with associated equipment and infrastructure. The Aixtron system is expected to be the only such system at a university in the U.S., and one of four in the world at a university.

In December 2021, Boise State received approval from the Board to purchase the Aixtron system equipment for the Lab 125/127 buildout. After purchase of the Aixtron system equipment, Boise State engaged an engineering firm to complete mechanical and electrical drawings to design the utility infrastructure required to support the Aixtron system equipment installation. Due to volatility in the construction market, the cost estimates to install the utility infrastructure for the Aixtron system were significantly higher than expected. Because this project initially did not meet the threshold for full Board approval, it did not receive planning and design approval pursuant to Idaho State Board of Education Governing Policies and Procedures, Sections V.K.3.a and V.K.4.

**IMPACT**

If approved, the university will proceed with bidding and construction of the supporting infrastructure and installation of the Aixtron system. This buildout will support state-of-the-art research and further the university’s collaborations with federal research efforts in microelectronics and semiconductors. The source of funds is university funds.

**ATTACHMENTS**

Attachment 1 – Project Tracking Sheet  
Attachment 2 – Project Budget

**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**APRIL 25, 2023**

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**BOARD STAFF COMMENTS AND RECOMMENDATIONS**

In December 2021, the Board approved the purchase of Aixtron Metal Organic Vapor Phase Epitaxy system as well as associated equipment and infrastructure. The infrastructure and equipment will support specialized federal government research efforts in microelectronics and semiconductors.

The total cost to install the utility infrastructure is estimated at \$1,500,000 for approximately 1,900 square feet.

Staff recommends approval.

**BOARD ACTION**

I move to approve the request by Boise State University to proceed with bidding and construction of the supporting infrastructure and installation of the Aixtron Metal Organic Vapor Phase Epitaxy system in an amount not to exceed \$1.5M.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

Office of the Idaho State Board of Education  
Capital Project Tracking Sheet

As of: Apr-23

History Narrative

- 1 **Institution/Agency:** Boise State University      **Project:** MCMR – Metal-Organic Chemical Vapor Disposition (MOCVD)
- 2 **Project Description:** Utility infrastructure and modifications to MCMR Labs 125 and 127 to support a new Aixtron 2D Cold Coupled Showerhead Metal Organic Chemical Vapor Phase Epitaxy system
- 3 **Project Use:** Infrastructure and equipment to support specialized research equipment used for federal government research efforts in microelectronics and semiconductors.
- 4 **Project Size:** \$1,500,000 total estimated budget; space where equipment is located is approx.1,900 SF

	Sources of Funds				Use of Funds			Total Uses
	PBF	ISBA	Other *	Total Sources	Planning	Use of Funds Const	Other	
9 Initial Cost of Project	\$ -	\$ -		\$ 1,500,000	\$ 110,000	\$ 1,100,000	\$ 290,000	\$ 1,500,000
11 History of Revisions:								
13 Proposed Revision	\$ -	\$ -						\$ -
22 Total Project Costs	\$ -	\$ -	\$ -	\$ 1,500,000	\$ 110,000	\$ 1,100,000	\$ 290,000	\$ 1,500,000

History of Funding:	PBF	ISBA	* Other Sources of Funds			Total Other	Total Funding
			Institutional Funds	Student Revenue	Other		
	\$ -	\$ -	\$ 1,500,000			\$ 1,500,000	\$ 1,500,000
						\$ -	\$ -
30 Total	\$ -	\$ -	\$ 1,500,000	\$ -	\$ -	\$ 1,500,000	\$ 1,500,000



**MCMR Research – Metal-Organic Chemical Vapor Deposition (MOCVD)  
Project Budget**

Project Number:	DPW 23-TBD
Project Title:	Micron Center for Materials Research – Metal-Organic Chemical Vapor Disposition (MOCVD)
Date:	February 2023

<b>Category</b>	<b>Project Budget</b>
Architectural Fees	\$14,900
Construction Costs	\$1,100,000
Testing, Inspections and Misc.	\$80,000
Construction Contingency	\$110,000
<b>Subtotal</b>	<b>\$1,304,900</b>

University Costs	\$95,100
Project Contingency	\$100,000

<b>Total Project Budget</b>	<b>\$1,500,000</b>
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**CONSENT**  
**APRIL 25, 2023**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Student Union Building Switchgear Replacement – Construction and Financing

**REFERENCE**

March 2022 Executive Director Project Approval

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.K.

**BACKGROUND/DISCUSSION**

The purpose of this project is to replace the electrical switchgear in the Student Union Building at Boise State University (BSU). The electrical switchgear is original to the building, installed in 1966, and is beyond its useful life. The project scope includes the replacement of obsolete electrical equipment including the switchgear, conductors and bus duct. This is an alteration or repair to existing facilities requiring authorization under Policy V.K.1 due to anticipated project costs in excess of \$1 million.

The original cost provided by the design-build contractor to replace the switchgear was \$557,988, which was approved by the Board's Executive Director on March 11, 2022. Upon further investigation, it was determined that the bus duct feeding the switchgear should also be replaced resulting in an increase to the project cost of \$377,511. A change order was requested by BSU, and was approved by the Idaho Division of Public Works and the contractor. This will cause the project to exceed the original approval, with an estimated cost of \$935,500. In addition to the base project cost, the Project Budget includes a \$300,000 contingency amount requested by DPW, with an additional contingency to cover possible unanticipated cost increases or additional replacement parts and related soft costs to be incurred.

The Student Union Building will remain occupied during the project apart from required power outages.

**IMPACT**

If approved, Boise State University will replace the existing electrical switchgear in the Student Union Building for an amount not to exceed \$1.6M. The source of funds is institutional reserves.

**ATTACHMENTS**

- Attachment 1 – Project Budget
- Attachment 2 – Construction Contract
- Attachment 3 – Executive Director Approval
- Attachment 4 – Change Order

**CONSENT**  
**APRIL 25, 2023**

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**BOARD STAFF COMMENTS AND RECOMMENDATIONS**

The \$1.6M estimated total funding comes from the original \$557,988 cost to replace the switchgear, plus the \$377,511 replacement of the bus duct feeding the switchgear, as well as the proportional increase in soft costs, such as contingencies.

Staff recommends approval.

**BOARD ACTION**

I move to approve the request by Boise State University to replace the electrical switchgear in the Student Union Building in an amount not to exceed \$1.6M.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

# PROJECT BUDGET

ATTACHMENT 1

PROJECT NUMBER: DPW 21-  
207

PROJECT TITLE: SUB Switchgear Replacement

CATEGORY	BUDGET
(AE) A/E FEES	21,000.00
(AR) A/E REIMBURSABLE	2,000.00
(CM) CONSTRUCTION MANAGER	
(MR) MGR REIMBURSABLE	
(CS) CONSULTANT	
(CR) CONSULT REIMBURSABLE	
(TC) TESTING DURING CONST	
(CC) CONSTRUCTION CONTRACT	935,500.00
(CO) CONTINGENCY & C.O.	100,000.00
SUBTOTAL CC+ CO	
(EQ) EQUIPMENT	
(M1) MISCELLANEOUS 1	
(M2) MISCELLANEOUS 2	
(M3) MISCELLANEOUS 3	
(CY) PROJECT CONTINGENCY	534,500.00
(PC) PLAN CHECK	6,900.00
(AD) ADVERTISING	100.00
(SS) SITE SURVEY	
(SI) SOIL INVESTIGATION	
<b>TOTAL</b>	<b>1,600,000.00</b>

**ATTACHMENT 2**  
**RECEIVED**  
MAY 05 2022  
**PUBLIC WORKS**

**DIVISION OF PUBLIC WORKS  
FIXED PRICE CONSTRUCTION CONTRACT  
BETWEEN OWNER AND CONTRACTOR**

**DPW PROJECT NO. 21-207  
SUB Switchgear Replacement  
Boise State University  
Boise, ID**



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**EXHIBITS**

- A PROJECT IDENTIFICATION, ADDENDA, CONTRACT AMOUNT, CONTRACT TIME, ACCEPTED ALTERNATES, LIQUIDATED DAMAGES
- B ADDRESSES AND REPRESENTATIVES (INCLUDING LIMITATIONS)
- C LIST OF DRAWINGS AND SPECIFICATIONS
- D CONTRACTOR'S AFFIDAVIT CONCERNING TAXES
- E NAMED SUBCONTRACTORS
- F NOTICE TO PROCEED
- G REQUEST FOR TAX RELEASE
- H RELEASE OF CLAIMS
- J CONDITIONS PRECEDENT TO FINAL PAYMENT
- K TRAINING CONFIRMATION SIGN IN SHEET
- L PROJECT FINALIZATION AND START-UP



**FIXED PRICE CONSTRUCTION CONTRACT  
BETWEEN OWNER AND CONTRACTOR**

THIS FIXED PRICE CONSTRUCTION CONTRACT BETWEEN OWNER AND CONTRACTOR (the "Contract") is by and between the State of Idaho, Department of Administration, Division of Public Works ("DPW" or the "Owner") and **Quality Electric** (the "Contractor") and is for the construction of the project (the "Project") identified as **DPW Project No. 21207** as more fully described in Exhibit A, and incorporated herein by reference. This Contract shall be effective on the Twenty Seventh day of April, 2022, when executed by both parties.

In consideration of the mutual promises, covenants, and agreements stated herein, and for other good and valuable consideration, the sufficiency of which is hereby acknowledged, the Owner and the Contractor agree:

**ARTICLE 1  
CONTRACT DOCUMENTS**

**1.1** The Contract Documents consist of this Contract, the drawings and specifications for the Project (the "Drawings and Specifications") identified in Exhibit C and any Addenda thereto issued prior to execution of this Contract, written amendments signed by both the Owner and the Contractor, Change Orders signed by both the Owner and the Contractor, Construction Change Directives and any written orders by the Design Professional for minor changes in the Work (the "Contract Documents"). Documents not included or expressly contemplated in this Article 1 do not, and shall not, form any part of the Contract Documents.

**1.2** The term "Work" means the construction and services required by the Contract Documents, whether completed or partially completed, and includes all other labor, materials, equipment and services provided or to be provided by the Contractor to fulfill the Contractor's obligations.

**ARTICLE 2  
REPRESENTATIONS AND WARRANTIES OF THE CONTRACTOR**

In order to induce the Owner to execute this Contract and recognizing that the Owner is relying thereon, the Contractor, by executing this Contract, makes the following express representations to the Owner:

**2.1** The Contractor is fully qualified to act as the Contractor for the Project and has, and shall maintain, any and all licenses, permits or other authorizations necessary to act as the Contractor for, and to construct, the Project.

**2.2** The Contractor has become familiar with the Project site and the local conditions under which the Project is to be constructed and operated particularly in correlation to the requirements of the Contract.

**2.3** The Contractor has received, reviewed, compared, studied and carefully examined all of the documents which make up the Contract Documents, including the Drawings and Specifications, and any Addenda, and has found them in all respects to be complete, accurate, adequate, consistent, coordinated and sufficient for construction. Such review, comparison, study and examination shall be a warranty that the contractor believes that the documents are complete and the Project is buildable as described except as reported.

**2.4** The Contractor warrants that the Contract Time is a reasonable period for performing the Work.

**2.5** The Contractor warrants to the Owner and Design Professional that all labor furnished on this Project shall be competent to perform the tasks undertaken; materials and equipment furnished under the Contract will be new and of high quality unless otherwise required or permitted by the Contract Documents; that the Work will be complete, of high quality and free from defects not inherent in the quality required or permitted; and that the Work will strictly conform to the requirements of the Contract Documents. Any Work not strictly conforming to these requirements, including substitutions not properly approved and authorized, shall be considered defective. The Contractor's warranty excludes remedy for damage or defect caused by abuse by Owner or its representatives, modifications not executed by the Contractor, improper or insufficient maintenance, improper operation, or normal wear and tear and normal usage. If required by the Owner, the Contractor shall furnish satisfactory evidence as to the kind and quality

of materials and equipment. This warranty shall survive the completion of the Contract and final payment to the Contractor.

**2.6 Certification Concerning Boycott of Israel.** Pursuant to Idaho Code section 67-2346, if payments under the Contract exceed one hundred thousand dollars (\$100,000) and Contractor employs ten or more persons, Contractor certifies that it is not currently engaged in, and will not for the duration of the Contract engage in, a boycott of goods or services from Israel or territories under its control. The terms in this section defined in Idaho Code section 67-2346 shall have the meaning defined therein.

**ARTICLE 3  
INTENT AND INTERPRETATION**

With respect to the intent and interpretation of this Contract, the Owner and the Contractor agree as follows:

**3.1** This Contract constitutes the entire and exclusive agreement between the parties with reference to the Project, and supersedes any and all prior discussions, communications, representations, understandings, negotiations or agreements. This Contract also supersedes any bid documents.

**3.2** The intent of the Contract is to include all items necessary for the proper execution and completion of the Project and anything that may be required, implied or inferred by the documents which make up this Contract, or any one or more of them, shall be provided by the Contractor for the Fixed Price Contract Amount. The Contract Documents are complementary, and what is required by one shall be as binding as if required by all.

**3.3** Nothing contained in this Contract shall create, nor be interpreted to create, privity or any other relationship whatsoever between the Owner and any person or entity except the Contractor; provided, however, that the Design Professional is entitled to performance and enforcement of obligations under the Contract intended or necessary to facilitate its duties. Any reference to the Owner, the Contractor or the Design Professional shall be deemed to include authorized representatives.

**3.4** When a word, term or phrase is used in this Contract, it shall be interpreted or construed first as defined herein; second, if not defined, according to its generally accepted meaning in the construction industry; and third, if there is no generally accepted meaning in the construction industry, according to its common and customary usage.

**3.5** The words "include," "includes," or "including," as used in this Contract, shall be deemed to be followed by the phrase "without limitation."

**3.6** The specification herein of any act, failure, refusal, omission, event, occurrence or condition as constituting a material breach of this Contract shall not imply that any other, non-specified act, failure, refusal, omission, event, occurrence or condition shall be deemed not to constitute a material breach of this Contract.

**3.7** The Contractor shall have a continuing duty to read, examine, review, compare and contrast each of the documents which make up this Contract, shop drawings and other submittals, and shall give timely written notice to the Owner and the Design Professional of any conflict, ambiguity, error or omission which the Contractor may find with respect to these documents before proceeding with the affected Work.

**3.8** The express or implied approval by the Owner or the Design Professional of any shop drawings or other submittals shall not relieve the Contractor of the continuing duties imposed hereby, nor shall any such approval be evidence of the Contractor's compliance with this Contract. The Owner has requested that the Design Professional prepare documents for the Project, including the Drawings and Specifications for the Project, which are accurate, adequate, consistent, coordinated and sufficient for construction. **HOWEVER, THE OWNER MAKES NO REPRESENTATION OR WARRANTY OF ANY NATURE WHATSOEVER TO THE CONTRACTOR CONCERNING SUCH DOCUMENTS.** The Contractor again hereby acknowledges and represents that it has received, reviewed and carefully examined such documents; has found them to be complete, accurate, adequate, consistent, coordinated and sufficient for construction; and that the Contractor has not, does not and will not rely upon any representations or warranties by the Owner concerning such documents, as no such representations or warranties have been or are hereby made.

**3.9** In the event of any conflict among any of the documents which make up this Contract, the Design Professional shall interpret the documents, and the interpretation shall be binding on both the Owner and Contractor; provided, however, that this does not change the Owner's right to make decisions regarding Claims in accordance with Article 13 and Article 14. If no interpretation is provided by the Design Professional, the most stringent requirement in the Contract Documents will apply.

**ARTICLE 4  
OWNERSHIP OF DOCUMENTS**

**4.1** Unless otherwise agreed by the Design Professional and its consultants, the party that prepared the drawings, specifications and other documents is the author of such with all copyright, common law, statutory and other reserved rights. The Contractor may retain one (1) record set of the Drawings and Specifications and other documents but shall not own or claim any copyright in them.

The Drawings and Specifications and other documents, and any copies, are to be used solely for this Project, and not on any other project, or additions to this Project outside this Contract, without written consent of the Owner, the Design Professional and the Design Professional's consultants; provided, however, that copies may be made of applicable portions as necessary for completion of the Work. Such copies shall include any copyright notice on the Drawings and Specifications and other documents.

Submission to or use by a regulatory body related to this Project is an acceptable use.

**ARTICLE 5  
CONTRACTOR'S PERFORMANCE**

The Contractor shall perform all of the Work required, implied or reasonably inferable from this Contract, including the following:

**5.1** Construction of the Project.

**5.2** The furnishing of any required surety bonds and insurance.

**5.3** The provision or furnishing, and prompt payment therefore, of labor, supervision, services, materials, supplies, equipment, fixtures, appliances, facilities, tools, transportation, storage, power, fuel, heat, light, cooling or other utilities required for construction and all necessary permits, including any required elevator permits, required for the construction of the Project. Construction projects for the State of Idaho require a building permit issued by the Division of Building Safety.

**5.4** The creation and submission of a detailed and comprehensive set of marked up blue or black-lined record drawings. Said record drawings shall be submitted to and approved by the Design Professional as a condition precedent to final payment to the Contractor.

**ARTICLE 6  
TIME FOR CONTRACTOR'S PERFORMANCE**

**6.1** The Contractor shall commence the performance of this Contract in accordance with the "Notice to Proceed" (Exhibit F) issued by the Owner and shall diligently continue its performance to and until final completion of the Project. The Contractor shall accomplish Substantial Completion of the Project on or before the time indicated in Exhibit A. The period of time, including any adjustments made under this Contract, for the Contractor to reach Substantial Completion is the "Contract Time."

**6.2** The Contractor may be assessed by and be responsible to the Owner for the amount indicated in Exhibit A per day for each and every calendar day of unexcused delay in achieving Substantial Completion beyond the date set forth for Substantial Completion. Any sums owed hereunder by the Contractor shall be payable not as a penalty but as liquidated damages, representing an estimate of delay damages likely to be sustained by the Owner estimated at the time of this Contract. When the Owner reasonably believes that Substantial Completion will be inexcusably

delayed, the Owner shall be entitled, but not required, to withhold from any amounts otherwise due the Contractor an amount then believed by the Owner to be adequate to recover liquidated damages applicable to such delays. If and when the Contractor overcomes the delay in achieving Substantial Completion, or any part thereof, for which the Owner has withheld payment, the Owner shall promptly release to the Contractor those funds withheld, but no longer applicable, as liquidated damages. The Owner's right to liquidated damages is not, and shall not be deemed to be, an exclusive remedy for delay and the Owner shall retain all remedies at law or in equity for delay or other breach.

**6.3** The term "Substantial Completion," as used herein, shall mean that point at which, as certified in writing by the Design Professional, or if there is no Design Professional, as certified by the Owner, the entire Project is at a level of completion in strict compliance with the Contract Documents, such that the Owner or its designee can enjoy beneficial use or occupancy and can use or operate it in all respects for its intended purpose. If, in the reasonable determination of the Owner, receipt of operation and maintenance manuals or completion of training is necessary for such beneficial use or occupancy, then there shall be no Substantial Completion until such manuals are provided or such training is completed. Partial use or occupancy of the Project shall not result in the Project being deemed substantially complete, or accepted as substantially complete, and such partial use or occupancy shall not be evidence of Substantial Completion. The Project shall not be deemed accepted until it is finally complete.

**6.4** Any request by the Contractor for an extension of the Contract Time must be made in accordance with, and is subject to, Article 13 and Article 14 related to Claims.

**6.5** The Owner shall have no liability of any kind to the Contractor if a schedule or other document submitted by the Contractor shows an intention to complete the Work prior to the scheduled completion date and for any reason other than Owner caused delay, the Contractor is not able to achieve such early completion.

## **ARTICLE 7**

### **FIXED PRICE AND CONTRACT PAYMENTS**

**7.1** The Owner shall pay, and the Contractor shall accept, as full and complete payment for the Contractor's timely performance of its obligations hereunder, the Fixed Price Contract Amount indicated in Exhibit A. The Fixed Price Contract Amount shall not be modified except as provided in this Contract.

**7.2** Prior to approval of the contract, the Contractor shall prepare and present to the Owner and the Design Professional the Contractor's Schedule of Values apportioning the Fixed Price Contract Amount among the different elements of the Project for purposes of periodic and final payment. The Contractor's Schedule of Values shall be presented in the Owner's web-based construction management software. The Contractor shall not imbalance its Schedule of Values nor artificially inflate any element thereof. The violation of this provision by the Contractor shall constitute a material breach of this Contract. The Contractor's Schedule of Values will be utilized for the Contractor's requests for payment but shall only be so utilized after it has been approved in writing by the Design Professional.

**7.3** The Owner shall pay the Fixed Price Contract Amount to the Contractor in accordance with the procedures set forth in this Article. The Contractor shall submit a Contractor's Request for Payment, on or before the day of each month indicated in Exhibit A or otherwise agreed to, after commencement of performance, but no more frequently than once monthly. Said payment request shall be on made in the Owner's web-based construction management software, and shall include whatever supporting information as may be required by the Design Professional, the Owner or both. Therein, the Contractor may request payment for one hundred percent (100%) of the Work satisfactorily completed to the date of the Contractor's Request for Payment, less five percent (5%) retainage, based on the Fixed Price Contract Amount allocated on the Schedule of Values. The Contractor's Request for Payment may include only: properly provided labor, materials or equipment properly incorporated into the Project, and time and materials or equipment necessary for the Project or that will be incorporated into the Project and are properly stored at the Project site (or elsewhere if off-site storage is approved in writing by the Owner). The Contractor's Request for Payment must exclude the total amount of previous payments received from the Owner. Any payment on account of stored materials or equipment will be subject to the Contractor providing written proof that the Owner has title to such materials or equipment and that they are fully insured against loss or damage. Each such Contractor's Request for Payment shall be signed by the Contractor and its submission shall constitute the Contractor's affirmative representation that the quantity of Work has reached the level for which payment is requested; that the Work has been properly installed or performed in strict compliance with the Contract; that all Work for which the Owner has

previously paid is free and clear of any lien, claim or other encumbrance of any person whatsoever; and that the Contractor knows of no reason why payment should not be made as requested. As a condition precedent to payment, the Contractor shall, if required by the Owner, furnish to the Owner properly executed waivers or releases, in a form acceptable to the Owner, from all subcontractors, materialmen, suppliers or others having any claims or alleged claims, wherein said subcontractors, materialmen, suppliers or others shall acknowledge receipt of all sums due pursuant to all prior Contractor's Requests for Payment, and waive and relinquish any rights or other claims relating to the Project or Project site. The submission by the Contractor of the Contractor's Request for Payment also constitutes the Contractor's affirmative representation that, upon payment of the Contractor's Request for Payment submitted, title to all Work included in such payment shall be vested in the Owner.

Thereafter, the Design Professional shall review the Contractor's Request for Payment and may also review the Work at the Project site or elsewhere to determine whether the quantity and quality of the Work are as represented in the Contractor's Request for Payment and as required by this Contract. The Design Professional shall approve in writing the amount which, in the opinion of the Design Professional, is properly owing to the Contractor and such approval is required before the Owner shall have any payment obligation. The Design Professional may withhold such approval, in whole or in part, as necessary to protect the Owner if it reasonably believes that the quantity or quality of the Work is not as represented in the Contractor's Request for Payment or is not in strict conformance to the Contract Documents.

**7.4** The Owner shall make payment to the Contractor no more than twenty-one (21) days following receipt by the Owner of the Design Professional's written approval of each Contractor's Request for Payment. The amount of each such payment shall be the amount approved for payment by the Design Professional less such amounts, if any, otherwise owing by the Contractor to the Owner or which the Owner shall have the right to withhold as authorized by this Contract. The Design Professional's approval of the Contractor's Request for Payment shall not preclude the Owner from the exercise of any of its rights it may have in this Contract, at law or in equity, as set forth in Paragraph 7.8 hereinafter.

**7.5** Off-site storage will not be approved at locations more than thirty (30) miles from the Project site or outside the State of Idaho and any payment for any off-site storage is subject to the following:

- .1 The Contractor must provide at least thirty (30) days' advance written notice of its request to store off-site. Such notice must include a description of the type, quantities, locations and values of materials involved for the next billing cycle. All invoices must indicate the type, quantities and value of materials or equipment for which payment is requested;
- .2 All materials stored off-site must be segregated and clearly marked with the DPW Project number and as being the "Property of the State of Idaho;"
- .3 The Design Professional and/or the Owner's Field Representative must have unrestricted access to the stored materials during all business hours and may physically inventory all invoiced materials and equipment and may physically inspect the storage conditions;
- .4 The Contractor must provide written Consent of Surety to off-site storage of materials and equipment and to payment for such materials and equipment prior to incorporation in the Work. Consent must be from the Surety. Consent of local broker or agent is not acceptable;
- .5 The Contractor must maintain and must provide to the Design Professional, upon request, a current log of stored materials and equipment, which reflects when materials and equipment are used or added; and
- .6 The Contractor must obtain and maintain all risk property insurance at replacement cost, with the State of Idaho listed as loss payee on all materials and equipment stored off-site and in transit.

**7.6** When payment is received from the Owner, the Contractor shall immediately pay all subcontractors, materialmen, laborer and suppliers the amounts they are due for the Work covered by such payment. The Contractor shall not withhold from a subcontractor or supplier more than the percentage withheld from a payment certificate for the subcontractor's or supplier's portion of the Work. In the event the Owner becomes informed that the Contractor has not paid a subcontractor, materialmen, laborer or supplier as provided herein, the Owner shall have the right, but not the duty, to issue future checks and payment to the Contractor of amounts otherwise due hereunder naming the

Contractor and any such subcontractor, materialmen, laborer or supplier as joint payees. Such joint check procedure, if employed by the Owner, shall create no rights in favor of any person or entity beyond the right of the named payees to payment of the check and shall not be deemed to commit the Owner to repeat the procedure in the future.

**7.7** Payment to the Contractor, utilization of the Project for any purpose by the Owner, or any other act or omission by the Owner shall not be interpreted or construed as an acceptance of any Work of the Contractor not strictly in compliance with this Contract.

**7.8** The Owner shall have and be entitled to the right to refuse to make any payment, including by reducing payment under any Contractor's Request for Payment, and, if necessary, may demand the return of a portion or all of an amount previously paid to the Contractor for reasons that include the following:

- .1** The quality of the Contractor's work, in whole or part, is not in strict accordance with the requirements of this Contract or identified defective work, including punch list work, is not remedied as required by the Contract Documents;
- .2** The quantity of the Contractor's work, in whole or in part, is not as represented in the Contractor's Request for Payment or otherwise;
- .3** The Contractor's rate of progress is such that, in the Owner's opinion, Substantial Completion or final completion, or both, may be inexcusably delayed or that the Owner will incur additional costs or expense related to repeated Substantial Completion or final completion inspections through no fault of the Owner;
- .4** The Owner reasonably believes that the Contractor has failed to use Contract funds, previously paid the Contractor by the Owner, to pay Contractor's project-related obligations, including subcontractors, laborers and material and equipment suppliers;
- .5** There are claims made or it seems reasonably likely that claims will be made, against the Owner;
- .6** The Contractor has caused a loss or damage to the Owner, the Design Professional or another contractor;
- .7** The Owner reasonably believes that the Project cannot be completed for the unpaid balance of the Fixed Price Contract Amount or the Owner reasonably believes that the Project cannot be completed within the Contract Time and that the unpaid balance of the Fixed Price Contract Amount would be inadequate to cover the cost of actual or liquidated damages for the anticipated delay;
- .8** The Contractor fails or refuses to perform any of its obligations to the Owner; or
- .9** The Contractor fails to pay taxes as required by Title 63, Chapter 15, Idaho Code.

In the event that the Owner makes written demand upon the Contractor for amounts previously paid by the Owner as contemplated in Paragraph 7.8, the Contractor shall promptly comply with such demand.

**7.9** If the Owner, without cause, fails to pay the Contractor any amounts due and payable thirty (30) days after those amounts are due pursuant to Paragraph 7.4, the Contractor shall have the right to cease the Work until receipt of proper payment. Contractor must first provide written notice to the Owner of the Contractor's intent to cease the Work ten (10) days prior to stopping the Work under this Paragraph. If any amounts remain unpaid after fifty-one (51) days after the Design Professional approves the Contractor's Request for Payment under Paragraph 7.4, interest at the rate of four percent (4%) per annum shall accrue on those unpaid amounts.

**7.10** When Contractor considers Substantial Completion has been achieved, the Contractor shall notify the Owner and the Design Professional in writing and shall furnish to the Design Professional a listing of those matters yet to be finished. The Design Professional will thereupon conduct an inspection to confirm that the Work is, in fact, substantially complete. Upon its confirmation that the Contractor's work is substantially complete, the Design Professional will so notify the Owner and Contractor in writing and will therein set forth the date of Substantial Completion. The Owner and the Contractor must accept the date of Substantial Completion in writing. Guarantees and warranties required by this Contract shall commence on the date of Substantial Completion. At the Contractor's

Request for Payment following Substantial Completion, the Owner shall pay the Contractor an amount sufficient to increase total payments to the Contractor to ninety-five percent (95%) of the Fixed Price Contract Amount, less any liquidated damages, less the reasonable costs as determined by the Design Professional for completing all incomplete work, correcting and bringing into conformance all defective and nonconforming work, and handling any outstanding or potential claims. If the Design Professional determines that the Contractor has made or is making satisfactory progress on any uncompleted portions of the Work, the Owner may, at its discretion, release a portion of the retainage to the Contractor prior to the actual final completion of the conditions set forth in Paragraph 7.13. It is the intent of the parties that the Project will be accepted only in total (at Substantial Completion and final completion) and not in phases unless provided for in Exhibit A. Any acceptance other than in total shall require written agreement of Owner and Design Professional.

**7.11** When Contractor considers the Project is at final completion, it shall notify the Owner and the Design Professional thereof in writing. Thereupon, the Design Professional will perform a final inspection of the Project. If the Design Professional confirms that the Project is complete in full accordance with the Contract Documents and that the Contractor has performed all of its obligations to the Owner, the Design Professional will furnish a final approval for payment to the Owner certifying to the Owner that the Project is complete and the Contractor is entitled to the remainder of the unpaid Fixed Price Contract Amount, less any amount withheld pursuant to this Contract.

**7.12** If the Contractor fails to achieve final completion within a reasonable number of days as established by the Design Professional from the date of Substantial Completion, the Contractor may be assessed and be responsible to the Owner for fifty percent (50%) of the daily amount of liquidated damages as established pursuant to Paragraph 6.2 and Exhibit A, per day for each and every calendar day of unexcused delay in achieving final completion beyond the date established for final completion of the Work. Any sums due and payable hereunder by the Contractor shall be payable not as a penalty but as liquidated damages representing an estimate of delay damages likely to be sustained by the Owner, estimated at or before the time of executing this Contract. When the Owner reasonably believes that final completion will be inexcusably delayed, the Owner may withhold from any amounts otherwise due the Contractor an amount then believed by the Owner to be adequate to recover liquidated damages applicable to such delays. If and when the Contractor overcomes the delay in achieving final completion, or any part thereof, for which the Owner has withheld payment, the Owner shall promptly release to the Contractor those funds withheld, but no longer applicable, as liquidated damages. The Owner's right to liquidated damages is not, and shall not be deemed to be, an exclusive remedy for delay and the Owner shall retain all remedies at law or in equity for delay or other breach.

**7.13** As a condition precedent to final payment, the Contractor must furnish the Owner, in the form and manner required by Owner, and with a copy to the Design Professional of the following:

- .1 An affidavit that all of the Contractor's obligations to subcontractors, laborers, equipment or material suppliers or other third parties in connection with the Project have been paid or otherwise satisfied;
- .2 A release by the Contractor of all Claims it has or might have against the Owner or the Owner's property (DPW's form, Exhibit H);
- .3 Contractor's Affidavit of Debts and Claims (AIA Document G706);
- .4 Consent of Surety to final payment (AIA Document G707);
- .5 Confirmation of all required training, product warranties, operating manuals, instruction manuals and other record documents, drawings and things customarily required of the Contractor; and
- .6 A Public Works Contract Tax Release issued by the Idaho Tax Commission (See "Request for Tax Release" form, Exhibit G, to be submitted by Contractor to the Idaho Tax Commission).

**7.14** The Owner shall, subject to its rights set forth in this Contract, make final payment of all sums due the Contractor within thirty (30) days of the Design Professional's execution of a final approval for payment and receipt of documentation required by Paragraph 7.13, whichever is received later.

**ARTICLE 8  
INFORMATION AND MATERIAL SUPPLIED BY THE OWNER**

- 8.1** The Administrator of DPW or his designee shall be the sole representative of the State of Idaho. The Design Professional shall have authority to bind Owner only as specifically set forth in this Contract.
- 8.2** The Owner will assign a Project Manager and a Field Representative to represent the Owner, identified in Exhibit B. The Owner's Field Representative's duties, responsibilities and limitations of authority are in accordance with DPW's policies and procedures.
- 8.3** The Owner shall furnish to the Contractor, prior to the execution of this Contract, any and all written and tangible material in its possession concerning conditions below ground at the site of the Project. Such written and tangible material is furnished to the Contractor only in order to make complete disclosure of such material as being in the possession of the Owner and for no other purpose. By furnishing such material, the Owner does not represent, warrant or guarantee its accuracy, either in whole in part, implicitly or explicitly.
- 8.4** The Owner will secure and pay for all required easements, the plan check fee required by the Division of Building Safety, conditional use permits and any other permits and fees specifically indicated in the Contract Documents to be secured and paid for by the Owner.
- 8.5** The Owner will provide the Contractor one (1) copy of this complete Contract and the number of sets of Drawings and Project Manuals (including Specifications) as indicated in Exhibit A. The Contractor may purchase additional copies, at its expense, from the Design Professional.

**ARTICLE 9  
STOP WORK ORDER**

- 9.1** In the event the Contractor fails or refuses to perform the Work as required or fails or refuses to correct nonconforming Work, the Owner may instruct the Contractor to stop Work in whole or in part. Upon receipt of such instruction, the Contractor shall immediately stop as instructed by the Owner and shall not proceed further until the cause for the Owner's instructions has been corrected, no longer exists or the Owner instructs that the Work may resume. In the event the Owner issues such instructions to stop, and in the further event that the Contractor fails and refuses within seven (7) days of receipt of same to provide adequate assurance to the Owner that the cause of such instructions will be eliminated or corrected, then the Owner shall have the right, but not the obligation, to carry out the Work with its own forces or with the forces of another contractor, and the Contractor shall be fully responsible and liable for the costs of performing such Work by the Owner. Without limiting what else might constitute nonconforming Work, the existence of a gross safety violation or other situation or condition that creates, or could imminently create, a threat of serious harm to persons or property, shall constitute nonconforming Work and any order to stop the Work issued for such reason shall not be considered an interference with the Contractor's performance of the Work or its means and methods. The rights set forth herein are in addition to, and without prejudice to, any other rights or remedies the Owner may have against the Contractor.
- 9.2** Any order to stop the Work issued pursuant to Paragraph 9.1 shall not be used to justify any Claim by the Contractor for additional time or money.

**ARTICLE 10  
DUTIES, OBLIGATIONS AND RESPONSIBILITIES OF THE CONTRACTOR**

In addition to any and all other duties, obligations and responsibilities of the Contractor set forth in this Contract, the Contractor shall have and perform the following duties, obligations and responsibilities to the Owner:

- 10.1** The Contractor's continuing duties set forth in Paragraph 3.7 are by reference hereby incorporated in this Paragraph 10.1. The Contractor shall not perform Work without adequate plans and specifications or, as appropriate, approved shop drawings or other submittals. If the Contractor performs Work knowing or believing it involves an error, inconsistency or omission in the Contract without first providing written notice to the Design Professional and Owner, the Contractor shall be responsible for such Work and shall pay the cost of correcting same.



**10.2** The Contractor shall take field measurements and verify field conditions and shall carefully compare such field measurements and conditions and other information known to the Contractor with the Contract Documents before commencing Work. Errors, inconsistencies or omissions discovered shall be reported to the Design Professional, the Owner and the Owner's Field Representative immediately. Such examination, review and comparison shall be a warranty that the Contract Documents are complete and the Project is buildable as described except as reported. Reported errors, inconsistencies or omissions will constitute a request for an interpretation by the Design Professional and may constitute a claim pursuant to Article 13 hereof where appropriate.

**10.3** The Contractor shall ensure that all Work shall strictly conform to the requirements of this Contract.

**10.4** The Work shall be strictly supervised, the Contractor bearing full responsibility for any and all acts or omissions of those engaged in the Work on behalf of the Contractor.

**10.5** All labor furnished on this Project shall be competent to perform the tasks undertaken; materials and equipment furnished under the Contract will be new and of high quality unless otherwise required or permitted by the Contract Documents; the Work will be complete, of high quality and free from defects not inherent in the quality required or permitted; and the Work will strictly conform to the requirements of the Contract Documents. Any Work not strictly conforming to these requirements, including substitutions not properly approved and authorized, shall be considered defective.

**10.6** Except as provided in Paragraph 8.4, the Contractor shall secure or provide and pay for all licenses, permits required by the Idaho Division of Building Safety, governmental approvals and inspections, connections for outside services for the use of municipal or private property for storage of materials, parking, utility services, temporary obstructions, enclosures or opening and patching of streets, and for all other facilities and services necessary for proper execution and completion of the Project.

**10.7** The Contractor shall comply with and give notices required by laws, ordinances, rules, regulations and lawful orders of public authorities bearing on performance of the Work.

**10.8** The Contractor shall employ and maintain at the Project site only competent supervisory personnel. Key supervisory personnel assigned by the Contractor to this Project are as listed in Exhibit B.

**10.9** The Contractor shall employ a competent superintendent and necessary assistants, as needed, to oversee execution of the Work. The superintendent shall be in attendance at the Project site during the progress of the Work. The superintendent and any project manager, if the Contractor utilizes a project manager, shall be reviewed and must be approved by the Design Professional and Owner, and neither shall be changed except with the consent of the Design Professional and Owner, unless the superintendent and/or project manager cease to be employed by the Contractor. Under this circumstance, any new superintendent or new project manager must be satisfactory to the Design Professional and Owner. Such approval shall not be unreasonably withheld. The superintendent and any project manager shall represent the Contractor and all communications given to the superintendent or project manager are deemed given to the Contractor.

**10.10** So long as the individuals named above remain actively employed or retained by the Contractor, they shall perform the functions indicated next to their names unless the Owner agrees to the contrary in writing. In the event one or more individuals not listed in Paragraph 10.9 subsequently assumes one or more of those functions listed in Paragraph 10.9, the Contractor shall be bound by the provisions of this paragraph as though such individuals had been listed in Paragraph 10.9.

**10.11** The Contractor shall provide to the Owner and the Design Professional a milestone schedule for completing the Work within the Contract Time. Such schedule shall be in a form specified in Division 1 of the Specifications and be acceptable to the Owner and to the Design Professional. The schedule must be submitted to and accepted by the Design Professional prior to the first request for payment unless required earlier by Division 1 of the Specifications. The Contractor's milestone schedule must be updated as required by the Design Professional and/or the Owner to reflect conditions encountered and shall apply to the total Project. The Contractor's revisions to the schedule shall not constitute a waiver of the requirement to complete the Project in the time allowed by the Contract, unless additional time for performance has been allowed pursuant to a Change Order. Any changes in milestone begin or end dates must be furnished to the Owner and the Design Professional. Strict compliance with the requirements of

this Paragraph shall be a condition precedent to the payment to the Contractor and failure by the Contractor to strictly comply with said requirements shall constitute a material breach of this Contract.

**10.12** Unless otherwise provided in the Construction Documents, on all projects where the Fixed Price Contract Amount is over \$1,000,000, the Contractor shall schedule and perform the Work in accordance with a Critical Path Method ("CPM") to indicate the rate of progress and practical order of the Project. The purpose of this scheduling requirement is to assure adequate planning, coordination and execution of the Work. The schedule shall indicate the dates for starting and completing major work activities, project events, major equipment, material and equipment submittals and delivery of major items. Project activities having critical time restraints on action, required by the Owner, shall be shown as scheduled milestones. The Contractor's schedule shall demonstrate the order, interdependence and sequence of activities. Critical paths shall be highlighted or distinguished. The schedule shall include all the dates specified in the Contract for Substantial Completion and final completion of the Work. The time limit set forth in the Contract for Substantial Completion and final completion must govern; the schedule must be adjusted to meet these dates. Schedule float shall belong to the Project. The Contractor shall submit to the Owner and Design Professional a CPM schedule within three (3) weeks after award of the Contract and maintain such schedule on a current basis in accordance with the Contract Documents.

**10.13** Once a month, or at intervals as required by the Design Professional, the Contractor shall advise the Owner and the Design Professional of the status of the Work (in duplicate) on the current milestone schedule. If any project milestone dates are not met on schedule, the Contractor shall immediately advise the Owner and Design Professional in writing of the proposed action to bring the Work on schedule. The Contractor shall also submit a detailed short term schedule, as required by Division 1 of the Specifications, each month. This short term schedule shall include a description of current and anticipated problem areas, delaying factors and their impact, and explanation of corrective action taken or proposed. If the Work is behind schedule, the Contractor shall indicate what measures it will take to put the Work back on schedule.

**10.14** If the Work is not progressing through no fault of the Owner or the Design Professional, as shown on the milestone schedule, as determined by the Design Professional, and the Owner and the Design Professional do not believe the Contractor's proposed action to bring the Work on schedule is adequate, then the Contractor shall be deemed in default under this Contract and the progress of the Work shall be deemed unsatisfactory. In such event, the Owner, at its discretion, may require the Contractor to work such additional time over regular hours, including Saturdays, Sundays and holidays, without additional cost to the Owner to bring the Work on schedule.

**10.15** The Contractor shall keep an updated copy of the Drawings and Project Manual (including Specifications) and Addenda at the site. Additionally, the Contractor shall keep a current submittal schedule and a copy of approved shop drawings and other submittals. All of these items shall be available to the Owner and the Design Professional at all regular business hours. Upon final completion of the Work, all of these items must be updated by the Contractor and provided to the Design Professional and shall become the property of the Owner.

**10.16** The Contractor shall carefully review and inspect for compliance with the Contract Documents, the shop drawings and other submittals (including product data and samples) required by the Contract Documents and shall submit to the Design Professional only submittals approved in accordance with this section. Such review and submittal shall be done promptly and in a sequence that will not delay its Work under this Contract or the activities of the Owner or of separate contractors. Shop drawings and other submittals from the Contractor do not constitute a part of the Contract. The Contractor shall not do any work requiring shop drawings or other submittals unless the Design Professional has verified compliance in writing. All Work requiring verified shop drawings or other submittals shall be done in strict compliance with such approved documents. However, verification of compliance by the Design Professional shall not be evidence that Work installed pursuant thereto conforms with the requirements of this Contract. The Design Professional shall have no duty to review submittals that are not Contractor approved, partial submittals or incomplete submittals. The Contractor shall maintain a submittal log which shall include, at a minimum, the date of each submittal, the date of any re-submittal, the date of any approval or rejection and the reason for any rejection.

**10.17** The Contractor shall maintain the Project site in a reasonably clean condition during performance of the Work. Upon final completion, the Contractor shall thoroughly clean the Project site of all debris, trash and excess materials or equipment.

**10.18** At all times relevant to this Contract, the Owner and the Design Professional shall have a right to enter the Project site and the Contractor shall allow the Owner and/or the Design Professional to review or inspect the work without formality or other procedure.

**10.19** The presence or duties of the Design Professional's or the Owner's personnel or representatives at the construction site, does not make any of them responsible for those duties that belong to the Contractor or other entities and does not relieve the Contractor or any other entities of their obligations, duties and responsibilities, including any obligation or requirement to have or to implement any health or safety plans or precautions. Except as provided in Paragraph 10.9, Design Professional's and Owner's personnel have no authority to exercise any control over any Contractor or other entities or their employees in connection with their work or any health or safety precautions and have no duty for inspecting, noting, observing, correcting or reporting on health or safety deficiencies of the Contractor or other entities or any other persons at the site except their own personnel. The presence of Design Professional's or Owner's personnel at a construction site is for the purpose of providing to Owner a greater degree of confidence that the completed Work will conform to the Contract Documents and that the integrity of the design concept as reflected in the Contract Documents has been implemented and preserved by the Contractor. For this Contract only, construction sites include places of manufacture for materials incorporated into the construction Work and Contractor includes manufacturers of materials incorporated into the construction Work.

**ARTICLE 11  
INDEMNITY**

**11.1** The Contractor shall defend, indemnify and hold harmless the Owner, Design Professional, and their employees, officers and agents harmless from any and all claims, liabilities, damages, losses, costs and expenses of every type whatsoever, including attorney fees and expenses, arising out of or resulting from the Contractor's work, acts or omissions under or related to the Contract Documents, to the extent caused by the Contractor, or anyone for whose acts the Contractor may be liable, regardless of whether such liability, claim, damage, loss, cost or expense is caused in part by the Owner.

**11.2** The limits of any insurance of the Contractor shall not be, and shall not be deemed to be, a limitation of the Contractor's defense and indemnity obligations contained in this Article.

**11.3** In claims against any person or entity indemnified under this Article by an employee of the Contractor, a subcontractor, anyone directly or indirectly employed by them, or anyone for whose acts they may be liable, the indemnification obligation under this Article shall not be limited by a limitation on amount or type of damages, compensation or benefits payable by or for the Contractor or a subcontractor under workers' or workmen's compensation acts, disability benefit acts or other employee benefit acts.

**ARTICLE 12  
THE DESIGN PROFESSIONAL**

The Design Professional for this Project is identified in Exhibit B, incorporated herein by reference, along with any authorized representatives and any limitations of responsibility. For the purpose of this Contract, the "Design Professional" means the properly licensed architect, properly registered professional engineer or other professional licensed in the State of Idaho who prepared the Drawings and Specifications for this Project. If the employment of the Design Professional is terminated, the Owner may retain a replacement professional and the role of the replacement professional shall be the same as the role of the Design Professional. Unless otherwise directed by the Owner in writing, the Design Professional will perform those duties and discharge those responsibilities allocated to the Design Professional in this Contract. The duties, obligations and responsibilities of the Design Professional shall be for contract administration and include the following:

**12.1** Unless otherwise directed by the Owner in writing, the Design Professional shall not act as the Owner's agent.

**12.2** Unless otherwise directed by the Owner in writing, the Owner and the Contractor shall communicate with each other through the Design Professional.

**12.3** When requested by the Owner or Contractor in writing, the Design Professional shall within seven (7) days render written interpretations necessary for the proper execution or progress of the Work or shall provide a written explanation as to why more time is needed and provide a date by which it will be provided.

**12.4** The Design Professional shall draft proposed change authorization(s).

**12.5** The Design Professional shall review and verify compliance or respond otherwise as necessary concerning shop drawings or other submittals received from the Contractor.

**12.6** The Design Professional shall be authorized to refuse to accept Work that is defective or otherwise fails to comply with the requirements of this Contract. If the Design Professional deems it appropriate, the Design Professional may, with the Owner's consent, require extra inspections or testing of the Work for compliance with the requirements of this Contract.

**12.7** The Design Professional shall review the Contractor's Request for Payment and shall verify in writing those amounts which, in the opinion of the Design Professional, are properly owing to the Contractor as provided in this Contract.

**12.8** The Design Professional shall, upon written request from the Contractor, perform Substantial Completion and final completion inspections contemplated by Article 6.

**12.9** The Design Professional may require the Contractor to make changes which do not involve a change in the Fixed Price Contract Amount or in the Contract Time consistent with the intent of this Contract. Such changes shall be given to the Contractor in writing under signature of the Design Professional, with a copy to the Owner, and may be in the form of a supplemental instruction.

**12.10** The Design Professional shall review and evaluate Claims and take other actions related to Claims in accordance with Articles 13 and 14.

**12.11** The duties, obligations and responsibilities of the Contractor under this Contract shall in no manner whatsoever be changed, altered, discharged, released or satisfied by any duty, obligation or responsibility of the Design Professional. The Contractor is not a third-party beneficiary of any Contract by and between the Owner and the Design Professional. It is expressly acknowledged and agreed that the duties of the Contractor to the Owner are independent of, and are not diminished by, any duties of the Design Professional to the Owner.

**ARTICLE 13  
CLAIMS**

**13.1** For purposes of this Contract, a "Claim" means a demand by the Contractor to the Owner, or by the Owner to the Contractor, for a change in the Fixed Price Contract Amount, an extension of the Contract Time, an adjustment to or interpretation of the Contract terms, or other relief with respect to the terms of the Contract, which demand the Contractor or Owner asserts is required or allowed under the Contract Documents and which the Contractor and the Owner have previously discussed and failed to agree upon.

**13.2** For the Claim to be considered, it must meet the following requirements:

- .1 The Claim must be in writing;
- .2 The Claim by the Contractor must be signed by an authorized representative of the Contractor, and the Claim by the Owner must be signed by an authorized representative of the Owner;
- .3 The Claim by the Contractor must be provided to the Owner and to the Design Professional and the Claim by the Owner must be provided to the Contractor and to the Design Professional;
- .4 The Claim must be made no later than ten (10) days after the event or first appearance of the circumstance giving rise to the Claim;

.5 The Claim must describe in detail all known facts and circumstances that the Contractor or Owner asserts support the Claim;

.6 The Claim must refer to the provision(s) of the Contract Documents that the Contractor or Owner asserts support the Claim;

.7 The Contractor or Owner must provide all documentation or other information to substantiate the Claim; and

.8 The Contractor or Owner must continue its performance under this Contract pending the resolution of any Claim; provided, however, that the Contractor shall not perform any additional or changed work not otherwise authorized in accordance with the Contract Documents.

**13.3** The failure by the Contractor to meet any of the requirements of Paragraph 13.2 shall constitute a complete waiver by the Contractor of any rights arising from or related to the Claim. Similarly, the failure by the Owner to meet any of the requirements of Paragraph 13.2 shall constitute a complete waiver by the Owner of any rights arising from or related to the Claim.

**13.4** If the Claim is made based on concealed or unknown site conditions, the following shall apply in addition to all other provisions applicable to the Claim:

.1 The condition must have been previously concealed and unknown or of a type not ordinarily encountered in the general geographic location of the Project and must not have been reasonably susceptible to discovery; and

.2 The Contractor shall notify the Design Professional and the Owner of the condition and shall not disturb the condition until the Design Professional and Owner have observed it or have waived in writing the right to observe it.

**13.5** If the Claim by the Contractor is for an increase in the Fixed Price Contract Amount, the following shall apply in addition to all other provisions applicable to the Claim:

.1 Any increase in the Fixed Price Contract Amount shall be strictly limited to the direct costs incurred by the Contractor and shall not include any other costs, indirect or other, including any costs for or related to lost productivity, profit, home office overhead and any other overhead, legal fees, claim preparation, any matter previously resolved by a change order, equipment costs, costs related to the services of a project manager unless the project manager was required full time by the Owner or the Contract Documents, any costs associated with the failure to complete the Work early or in advance of the date required by the Contract Documents, it being specifically agreed to by the parties that there is no intention to have the Eichleay or other similar formula applicable to this Contract nor shall this Contract be deemed to be subject to any such formula; and

.2 The Owner shall have no liability for, and the Fixed Price Contract Amount shall not be increased related to, any claims of third parties, including subcontractors, unless and until the liability of the Contractor for such has been established in a court of competent jurisdiction and any such liability of the Owner shall be limited in the same manner as described in subparagraph 13.5.1.

**13.6** If the Claim by the Owner is for a change in the Fixed Price Contract Amount, all other applicable provisions to the Claim apply.

**13.7** If the Claim by the Contractor is for an extension of the Contract Time, the following shall apply in addition to all other provisions applicable to the Claim:

.1 The Contractor has been delayed in its performance by an act or omission of the Owner and through no fault of the Contractor;

.2 The Contractor has been delayed in its performance by unusually severe weather that could not reasonably have been anticipated or by another event not within its reasonable control;

.3 At the time it occurs or during its occurrence, the delay will preclude completion of the Project in the time required by the Contract Documents; and

.4 Any extension of the Contract Time shall be the Contractor's sole and exclusive remedy for any delay except a delay caused by the active interference of the Owner with the Contractor's performance which active interference continues after written notice to the Owner. The Owner's exercise of any of its rights or remedies under this Contract, including ordering changes in the Work, directing suspension, rescheduling or correction of the Work, do not constitute active interference.

**13.8** If a Claim is made based on an error, inconsistency or omission in the Contract that was reasonably susceptible to discovery by the Contractor and was not reported in accordance with Paragraph 2.3, that Claim shall be denied.

**ARTICLE 14  
RESOLUTION OF CLAIMS**

**14.1** All Claims made in accordance with Article 13 shall be reviewed and evaluated by the Design Professional. If the Claim is not made in strict accordance with Article 13, it shall be rejected as waived. Any failure by the Design Professional to reject the Claim for failure to meet the requirements of Article 13 is not binding on the Owner and the Owner may reject the Claim for such failure.

**14.2** No later than seven (7) days from receipt of the Claim by the Design Professional, it shall:

.1 Make a written request to the Contractor or Owner for more data to support the Claim;

.2 Attempt to facilitate resolution of the Claim through informal negotiations; or

.3 If the Claim is by the Contractor, make a written recommendation to the Owner, with a copy to the Contractor, that the Owner reject or approve all or part of the Claim and state the reasons for the Design Professional's recommendation. If the Claim is by the Owner, make a written recommendation to the Contractor, with a copy to the Owner, that the Contractor reject or approve all or part of the Claim and state the reasons for the Design Professional's recommendation.

**14.3** If the Design Professional requests more data from the Contractor or the Owner under subparagraph 14.2.1, the Contractor or Owner shall respond no later than seven (7) days from receipt of such request, and provide additional data, provide a date certain by which additional data will be provided, or state that it will not provide additional data. Upon receipt of data, if any, in accordance with this section, the Design Professional will complete the evaluation of the Claim. Failure to respond at all or failure to provide data by the date specified in the response to the request shall result in the Claim being evaluated based on the information in the Design Professional's possession.

**14.4** In evaluating the Claim, the Design Professional may consult with the Contractor, the Owner or other persons with knowledge or expertise that may assist the Design Professional in its evaluation.

**14.5** No later than fourteen (14) days after receipt by the Owner of the Design Professional's recommendation regarding the Contractor's Claim, the Owner shall, in writing, notify the Contractor and the Design Professional of its decision regarding the Claim. No later than fourteen (14) days after receipt by the Contractor of the Design Professional's recommendation regarding the Owner's Claim, the Contractor shall, in writing, notify the Owner and the Design Professional of its decision regarding the Claim.

**14.6** The Owner's decision regarding the Contractor's Claim is binding on the Owner and the Contractor but is subject to mediation in accordance with this Contract, and the Contractor's decision regarding the Owner's Claim is binding on the Owner and the Contractor but is subject to mediation in accordance with this Contract.

**ARTICLE 15  
SUBCONTRACTORS**

**15.1** A document in the form of Exhibit E shall be completed and submitted upon execution of this Contract and those subcontractors named therein shall match those subcontractors named in the Contractor's bid unless otherwise agreed to in writing by the Owner. Also upon execution of this Contract by the Contractor, the Contractor shall identify to the Owner and the Design Professional, in writing, those parties intended as subcontractors on the Project not otherwise named in Exhibit E. The Owner shall, in writing, state any objections the Owner may have to one or more of such subcontractors. The Contractor shall not enter into a subcontract with an intended subcontractor with reference to whom the Owner objects. All subcontracts shall afford the Contractor rights against the subcontractor which correspond to those rights afforded to the Owner against the Contractor herein, including those rights of Contract Termination as set forth in this Contract. All subcontractors shall, throughout the duration of this Contract, be properly licensed as Idaho Public Works Contractors.

**15.2** The Contractor conditionally assigns each of its subcontracts related to the Project to the Owner. All subcontracts between the Contractor and the subcontractors shall obligate the subcontractor to such conditional assignment. Upon a Termination by the Owner for cause under Paragraph 20.1, the Owner may accept such conditional assignment by written notification to the applicable subcontractor and to the Contractor. Such acceptance is subject to the rights of the Surety, if any, relating to the Contract.

**ARTICLE 16  
CHANGES IN THE WORK**

**16.1** General

**.1** Changes in the Work may be accomplished after execution of the Contract, and without invalidating the Contract, by Change Order, Construction Change Directive or order for a minor change in the Work, subject to the limitations stated in this Article and elsewhere in the Contract Documents; and

**.2** Changes in the Work shall be performed under applicable provisions of the Contract Documents and the Contractor shall proceed promptly, unless otherwise provided in the Change Order, Construction Change Directive or order for a minor change in the Work.

**16.2** Change Orders

**.1** A "Change Order" is a written instrument prepared by the Design Professional and signed by the Owner, Contractor and Design Professional, stating their agreement upon: a change in the work, any adjustment in the Fixed Price Contract Amount and any adjustment in the Contract Time;

**.2** Methods used in determining adjustments to the Fixed Price Contract Amount may include those listed in subparagraph 16.3.4;

**.3** The amount allowed for overhead and profit on any Change Order is limited to the amounts indicated in subparagraph 16.3.11;

**.4** Any Change Order prepared, including those arising by reason of the parties' mutual agreement or by mediation, shall constitute a final and full settlement of all matters relating to or affected by the change in the Work, including all direct, indirect and consequential costs associated with such change and any and all adjustments to the Fixed Price Contract Amount and Contract Time. In the event a Change Order increases the Fixed Price Contract Amount, the Contractor shall include the Work covered by such Change Order in the Contractor's Request for Payment as if such Work were originally part of the Project and Contract Documents; and

**.5** By the execution of a Change Order, the Contractor agrees and acknowledges that it has had sufficient time and opportunity to examine the change in Work which is the subject of the Change Order and that it has undertaken all reasonable efforts to discover and disclose any concealed or unknown conditions which may to any extent affect the Contractor's ability to perform in accordance with the Change Order. Aside

from those matters specifically set forth in the Change Order, the Owner shall not be obligated to make any adjustments to either the Fixed Price Contract Amount or Contract Time by reason of any conditions affecting the change in Work addressed by the Change Order, which could have reasonably been discovered or disclosed by the Contractor's examination.

### 16.3 Construction Change Directive (CCD)

.1 A "Construction Change Directive" is a written order prepared by the Design Professional and signed by the Owner and Design Professional directing a change in the Work prior to agreement on adjustment, if any, in the Fixed Price Contract Amount or Contract Time or both. The Owner may by Construction Change Directive, without invalidating the Contract, order changes in the Work within the general scope of the Contract, consisting of additions, deletions or other revisions, the Fixed Price Contract Amount and Contract Time being adjusted accordingly;

.2 A Construction Change Directive, within limitations, may also be used to incorporate minor changes in the Work agreed to by the Design Professional's representative, the Owner's Field Representative and the Contractor's superintendent or project manager. The limits of these representatives' authority with regard to Construction Change Directives shall be documented in writing by the Design Professional, Owner and Contractor;

.3 A Construction Change Directive shall be used in the absence of total agreement on the terms of a Change Order;

.4 If the Construction Change Directive provides for an adjustment to the Fixed Price Contract Amount, the adjustment shall be based on one (1) of the following methods:

.1 Mutual acceptance of a lump sum properly itemized and supported by sufficient substantiating data to permit evaluation;

.2 Unit prices stated in the Contract Documents or subsequently agreed upon;

.3 Cost to be determined in a manner agreed upon by the parties and a mutually acceptable fixed or percentage fee; or

.4 As provided in subparagraph 16.3.7;

.5 Upon receipt of a Construction Change Directive, the Contractor shall promptly proceed with the change in the Work involved and advise the Design Professional in writing within forty-eight (48) hours of the Contractor's agreement or disagreement with the method, if any, provided in the Construction Change Directive for determining the proposed adjustment in the Fixed Price Contract Amount or Contract Time;

.6 A Construction Change Directive signed by the Contractor indicates the agreement of the Contractor therewith, including adjustment in Fixed Price Contract Amount and Contract Time or the method for determining them. Such agreement shall be effective immediately and shall be incorporated into a future Change Order;

.7 If the Contractor does not respond promptly or disagrees with the method for adjustments in the Fixed Price Contract Amount or Contract Time, the method and the adjustment shall be determined by the Design Professional on the basis of reasonable expenditures and savings of those performing the Work attributable to the change, including, in case of an increase in the Fixed Price Contract Amount, an allowance for overhead and profit in accordance with subparagraph 16.3.11. In such case of an increase in Fixed Price Contract Amount, and also under subparagraph 16.3.4, the Contractor shall keep and present, in such form as the Design Professional may prescribe, an itemized accounting together with appropriate supporting data. Unless otherwise provided in the Contract Documents, costs for the purposes of this subsection shall be limited to the following:

.1 Costs of labor, including social security, old age and unemployment insurance, fringe benefits required by agreement or custom and workers' compensation insurance;



- .2 Costs of materials, supplies and equipment, including cost of transportation, whether incorporated or consumed;
- .3 Rental costs of machinery and equipment, exclusive of hand tools, whether rented from the Contractor or others;
- .4 Costs of permit fees and sales, use or similar taxes related to the Work; and
- .5 Additional costs of supervision and field office personnel directly attributable to the change;
- .8 The amount of credit to be allowed by the Contractor to the Owner for a deletion or change which results in a net decrease in the Fixed Price Contract Amount shall be for the actual net cost of the decrease, confirmed by the Design Professional. When both additions and credits covering related Work or substitutions are involved in a change, the allowance for overhead and profit shall be figured on the basis of net increase, if any, with respect to that change;
- .9 Pending final determination of the total cost of a Construction Change Directive to the Owner, amounts not in dispute for such changes in the Work shall be included in the Contractor's Request for Payment accompanied by a Change Order indicating the parties' agreement with part or all of such costs;
- .10 When the Owner and Contractor agree with the determination by the Design Professional concerning the adjustments in the Fixed Price Contract Amount and Contract Time, or otherwise reach agreement upon the adjustments, such agreement shall be effective immediately and shall be recorded by preparation and execution of an appropriate Change Order; and
- .11 For purposes of subparagraphs 16.2.3 and 16.3.7, the allowance for combined overhead, profit, bonds and insurance shall be limited as follows, unless otherwise provided in the Contract Documents:
  - .1 For changes, the amount allowed for overhead, profit, bonds and insurance for the Contractor and all subcontractors of any tier combined shall not exceed fifteen percent (15%) of direct costs; or
  - .2 The Contractor will determine the apportionment between the Contractor and its subcontractors of allowable amounts of overhead, profit, bonds and insurance.

16.4 The Design Professional will have authority to order minor changes in the Work not involving adjustment in the Fixed Price Contract Amount or extension of the Contract Time and not inconsistent with the intent of the Contract Documents. Such changes shall be effected by written order and shall be binding on the Owner and Contractor. The Contractor shall carry out such written orders promptly.

#### ARTICLE 17

#### DISCOVERING AND CORRECTING DEFECTIVE OR INCOMPLETE WORK

17.1 If the Contractor covers, conceals or obscures its Work in violation of this Contract or in violation of a directive or request from the Owner or the Design Professional, such Work shall be uncovered and displayed for the Owner's or Design Professional's inspection upon request and shall be reworked at no cost in time or money to the Owner.

17.2 If any of the Work is covered, concealed or obscured in a manner not addressed by Paragraph 17.1, it shall, if directed by the Owner or the Design Professional, be uncovered and displayed for the Owner's or Design Professional's inspection. If the uncovered Work conforms strictly with this Contract, the costs incurred by the Contractor to uncover and subsequently replace such Work shall be borne by the Owner. Otherwise, such costs shall be borne by the Contractor.

17.3 The Contractor shall, at no cost in time or money to the Owner, promptly correct Work (fabricated, installed or completed) rejected by the Owner or by the Design Professional as defective or that fails to conform to this Contract whether discovered before or after Substantial Completion. Additionally, the Contractor shall reimburse the Owner for all testing, inspections and other expenses incurred as a result thereof.

**17.4** In addition to any other warranty obligations in this Contract, the Contractor shall be specifically obligated to correct, upon written direction from the Owner, any and all defective or nonconforming Work for a period of twelve (12) months following Substantial Completion.

**17.5** The Owner may, but shall in no event be required to, choose to accept defective or nonconforming Work. In such event, the Fixed Price Contract Amount shall be reduced by the lesser of: (i) the reasonable costs of removing and correcting the defective or nonconforming Work; or (ii) the difference between the fair market value of the Project as constructed and the fair market value of the Project had it not been constructed in such a manner as to include defective or nonconforming Work. If the remaining portion of the unpaid Fixed Price Contract Amount, if any, is insufficient to compensate the Owner for the acceptance of defective or nonconforming Work, the Contractor shall, upon written demand from the Owner, pay the Owner such remaining compensation for accepting defective or nonconforming work.

**ARTICLE 18  
TERMINATION BY THE CONTRACTOR**

**18.1** The Contractor may terminate the Contract if the Work is stopped for a period of ninety (90) consecutive days through no act or fault of the Contractor or a subcontractor, sub-subcontractor or their agents or employees or any other persons or entities performing portions of the Work under direct or indirect contract with the Contractor, for any of the following reasons:

- .1 Issuance of an order by a court or by another public authority having jurisdiction and authority which requires all Work to be stopped; or
- .2 An act of government, such as a declaration of national emergency, which requires all Work to be stopped.

**18.2** In such event, the Contractor shall be entitled to recover from the Owner as though the Owner had terminated the Contractor's performance under this Contract pursuant to Paragraph 20.3.

**ARTICLE 19  
OWNER'S RIGHT TO SUSPEND CONTRACTOR'S PERFORMANCE**

**19.1** The Owner may, at any time and without cause, order the Contractor, in writing, to suspend, delay or interrupt the Work in whole or in part for such period of time as the Owner may determine. If the Owner directs any such suspension, the Contractor must immediately comply with same.

**19.2** In the event the Owner directs a suspension of performance under this Article, and such suspension is through no fault of the Contractor, the Fixed Price Contract Amount and Contract Time shall be adjusted for increases in the cost and time caused by such suspension, delay or interruption to cover the Contractor's reasonable costs, actually incurred and paid, of:

- .1 Demobilization and remobilization, including such costs paid to subcontractors;
- .2 Preserving and protecting Work in place;
- .3 Storage of materials or equipment purchased for the Project, including insurance thereon; and
- .4 Performing in a later, or during a longer, time frame than that provided by this Contract.

**19.3** The adjustment of the Fixed Price Contract Amount shall include an amount for a reasonable profit. The adjustment of the Fixed Price Contract Amount shall not include any amount not otherwise allowed under this Contract, including any limitations applicable to Claims. The Contractor shall provide supporting documentation related to any increase upon request of the Owner. No adjustment shall be made to the extent:

- .1 That performance is, was or would have been so suspended, delayed or interrupted by another cause for which the Contractor is responsible; or

- .2 That an equitable adjustment is made or denied under another provision of the Contract.

**ARTICLE 20  
TERMINATION BY THE OWNER**

The Owner may terminate this Contract in accordance with the following terms and conditions:

**20.1** If the Contractor does not perform the Work, or any part thereof, in accordance with the Contract Documents, or in a timely manner; does not supply adequate labor, supervisory personnel, or proper equipment or materials; fails to pay subcontractors; fails to timely discharge its obligations for labor, equipment, and materials; proceeds to disobey applicable law; or otherwise breaches this Contract, then the Owner, in addition to any other rights it may have against the Contractor, may terminate the Contract and assume control of the Project site and of all materials and equipment at the site and may complete the Work. In such case, the Contractor shall not be paid further until the Work is complete. Upon such Termination, the Owner may, subject to any superior rights of the Surety, take possession of the site and of all materials, equipment, tools and construction equipment and machinery thereon owned by the Contractor; accept assignment of those subcontracts conditionally assigned under Paragraph 15.2; and finish the Work by whatever reasonable method the Owner may deem expedient.

**20.2** When the Owner terminates the Contract for cause as provided in Paragraph 20.1, the Contractor shall not be entitled to receive further payment until the Work is finished and shall only be entitled to payment for Work satisfactorily performed by the Contractor in accordance with the Contract Documents. If the costs of finishing the Work, including compensation for the Design Professional's services and expenses made necessary thereby, exceed the unpaid balance, the Contractor shall pay the difference to the Owner. This obligation for payment shall survive termination of the Contract. The Contractor shall also terminate outstanding orders and subcontracts. The Contractor shall settle the liabilities and claims arising out of the termination of subcontracts and orders. In the event the employment of the Contractor is terminated by the Owner for cause pursuant to Paragraph 20.1 and it is subsequently determined by a court of competent jurisdiction that such termination was without cause, such termination shall thereupon be deemed a Termination under Paragraph 20.3 and the provisions of Paragraph 20.3 shall apply.

**20.3** The Owner may, at any time and for any reason, terminate this Contract. The Owner shall give no less than seven (7) days' written notice of such Termination to the Contractor specifying when termination becomes effective. The Contractor shall incur no further obligations in connection with the Work and the Contractor shall stop Work when such Termination becomes effective. The Contractor shall also terminate outstanding orders and subcontracts. The Contractor shall settle the liabilities and claims arising out of the termination of subcontracts and orders. The Owner may direct the Contractor to assign the Contractor's right, title and interest under termination orders or subcontracts to the Owner or its designee. The Contractor shall transfer title and deliver to the Owner such completed or partially completed Work and materials, equipment, parts, fixtures, information and Contract rights as the Contractor has. When terminated pursuant to this section, the following shall apply:

.1 The Contractor shall submit a Termination Claim to the Owner and the Design Professional specifying the amounts claimed due because of the Termination, together with costs, pricing or other supporting data required by the Owner or the Design Professional. Failure by the Contractor to file a Termination Claim within ninety (90) days from the effective date of termination shall be deemed a complete waiver by the Contractor of any right to any payment;

.2 Before or after receipt of the Termination Claim, the Owner and the Contractor may agree to the compensation, if any, due to the Contractor hereunder; and

.3 If the Contractor has filed the Termination Claim but the Contractor and the Owner do not agree on an amount due to the Contractor, the Owner shall pay the Contractor the following amounts:

.1 Unpaid Contract prices for labor, materials, equipment and other services provided or perfected prior to termination and acceptable to or accepted by the Owner;

.2 Reasonable costs incurred in preparing to perform the terminated portion of the Work, and in terminating the Contractor's performance, plus a fair and reasonable allowance for direct job-site overhead and profit related to such preparation (such profit shall not include anticipated profit or consequential damages); provided, however, that if it appears that the Contractor would have not

profited or would have sustained a loss if the entire Contract would have been completed, no profit shall be allowed or included and the amount of compensation shall be reduced to reflect the anticipated loss, if any; and

.3 Reasonable costs of settling and paying claims arising out of the Termination of subcontracts or orders pursuant to this Paragraph 20.3.

**20.4** Costs described in subparagraphs 20.3.3.2 or 20.3.3.3 above shall not include amounts paid in accordance with other provisions hereof. In no event shall the total sum to be paid the Contractor under subparagraph 20.3.3 exceed the total Fixed Price Contract Amount, as properly adjusted, reduced by the amount of payments previously or otherwise made and by any other deductions permitted under this Contract and shall in no event include duplication of payment.

**ARTICLE 21  
CONTRACTOR'S LIABILITY INSURANCE**

**21.1** The Contractor, subcontractor and sub-subcontractor shall purchase and maintain in full force and effect from a company or companies lawfully authorized to do business in the State of Idaho such insurance as will protect the Contractor, subcontractor and sub-subcontractor from claims set forth below which may arise out of or result from the Contractor's or subcontractor's operations under the Contract and for which the Contractor may be legally liable, whether such operations be by the Contractor or by a subcontractor or by anyone directly or indirectly employed by any of them or by anyone for whose acts any of them may be liable:

- .1 Claims under workers' or workmen's compensation, disability benefits and other similar employee benefit acts which are applicable to the work to be performed;
- .2 Claims for damages because of bodily injury, occupational sickness or disease or death of the Contractor's employees;
- .3 Claims for damages because of bodily injury, sickness or disease or death of any person other than the Contractor's employees;
- .4 Claims for damages insured by usual personal injury liability coverage which are sustained: (i) by a person as a result of an offense directly or indirectly related to employment of such person by the Contractor; or (ii) by another person;
- .5 Claims for damages, other than to the Work itself, because of injury to or destruction of tangible property, including loss of use resulting there from;
- .6 Claims for damages because of bodily injury, death of a person or property damage arising out of ownership, maintenance or use of a motor vehicle;
- .7 Claims for bodily injury or property damage arising out of completed operations; and
- .8 Claims involving contractual liability insurance applicable to the Contractor's obligations under Article 11.

**21.2** The insurance required by Paragraph 21.1 above shall be written for not less than limits of liability specified in this Contract or as required by law, whichever is greater. Coverages, whether written on an occurrence or claims-made basis, shall be maintained without interruption from date of commencement of the Work until date of final payment and termination of any coverage required to be maintained after final payment. In addition, for any insurance required that is obtained on a claims-made basis, "tail coverage" is required at the completion of the Work for twenty-four (24) months. Continuous claims-made coverage will be acceptable in lieu of "tail coverage" provided the retroactive date is on or before the effective date of this Contract or twenty-four (24) months "prior acts" coverage is provided.

- .1 The insurance required by Paragraph 21.1 above shall be written for not less than the following limits:

.1 Workers' Compensation and Employer's Liability

- (a) State Workers Compensation: Statutory
- (b) Employer's Liability: \$100,000 per Accident  
\$500,000 Disease, Policy Limit  
\$100,000 Disease, Each Employee

.2 Comprehensive Commercial General Liability and Umbrella Liability Insurance. Contractor shall maintain Commercial General Liability ("CGL") and, if necessary, commercial umbrella insurance with a limit of not less than \$1,000,000 each occurrence. If such CGL insurance contains a general aggregate limit, it shall apply separately to this project location;

CGL insurance shall be written on Insurance Services Office ("ISO") occurrence form CG 00 01 12 04 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operation, independent contractors, products-completed operations, personal (including employee acts) and advertising injury and liability assumed under an insured contract (including the tort liability of another assumed in a business contract). As applicable, coverage must also include a broad form CGL endorsement if the substitute insurance is a 1973 edition CGL or its equivalent;

Owner shall be included as an additional insured under the CGL, using ISO additional insured endorsement CG 20 10 and CG 20 37 or their equivalent, which endorsement shall include coverage for the Owner with respect to liability arising out of the Work, including completed operations of Contractor, and which coverage shall be maintained in effect for the benefit of Owner for a period of two (2) years following the completion of the work specified in this Contract. Additional insured coverage as required in this subparagraph shall apply as primary insurance with respect to any other insurance or self-insurance programs afforded to the Owner;

- (a) For the hazards of explosion, collapse, and damage to underground property, commonly referred to as XCU, coverage shall be required if the exposures exist; and

This coverage may be provided by the subcontractor if the Owner and prime Contractor are named as additional insureds;

.3 Business Auto and Umbrella Liability Insurance: Contractor shall maintain business, auto liability and, if necessary, commercial umbrella liability insurance with a limit of not less than \$1,000,000 each accident;

Such insurance shall cover liability arising out of any auto (including owned, hired, and non-owned autos);

Business auto coverage shall be written on ISO form CA 00 01, CA 00 05, CA 00 12, CA 00 20 or a substitute form providing equivalent liability coverage. If necessary, the policy shall be endorsed to provide contractual liability coverage equivalent to that provided in the 1990 and later editions of CA 00 01;

If hazardous waste will be hauled, Contractor shall obtain pollution liability coverage equivalent to that provided under the ISO pollution liability-broadened coverage for covered autos endorsement (CA 99 48) and the Motor Carrier Act endorsement (MCS 90) shall be attached;

.4 If the General Liability coverages are provided by Commercial Liability policies the:

- .1 General Aggregate shall be not less than \$2,000,000; and
- .2 Fire legal liability shall be provided in an amount not less than \$100,000 per occurrence; and

**.5** Umbrella Excess Liability. An umbrella policy may be used in combination with other policies to provide the required coverage.

**21.3** The Owner shall be named as additional insured or loss payee, as applicable, on the insurance required in subparagraphs 21.2.1.2, 21.2.1.3 and 21.2.1.5 above, and the insurance shall contain the severability of interest clause as follows:

"The insurance afforded herein applies separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the company's 'liability.' "

**21.4** The Contractor may include all subcontractors as insureds under the Contractor's policies in lieu of separate policies by each subcontractor. The Contractor must furnish the State of Idaho, Division of Public Works, with the required endorsements or certificates of insurance from each subcontractor which names the subcontractor, its officials, employees and volunteers as insureds.

**21.5** Certificates of Insurance for Workers' Compensation shall be on the standard form. Certificates of Insurance for Commercial or Comprehensive General Liability shall be the most current ACORD Form 25 or 28, must be acceptable to the Owner and shall be filed with the Owner prior to commencement of the Work. The Owner may require proof of coverage by an endorsement. If any of the foregoing insurance coverages are required to remain in force after final payment and are reasonably available, an additional certificate evidencing continuation of such coverage shall be submitted with the final Contractor's Request for Payment as required by Article 7. Information concerning reduction of coverage shall be furnished by the Contractor with reasonable promptness in accordance with the Contractor's information and belief.

**ARTICLE 22  
OWNER'S LIABILITY INSURANCE**

The Owner, at its option, may purchase or maintain insurance for protection against claims which may arise from operations under the Contract.

**ARTICLE 23  
PROPERTY INSURANCE**

**23.1** Unless otherwise provided, the Owner shall purchase or maintain, from a company or companies lawfully authorized to do business in the State of Idaho, property insurance written on a builders risk "all-risk" or equivalent policy form in an amount not less than the initial Fixed Price Contract Amount. Such property insurance shall be maintained until final payment to the Contractor has been made. This insurance shall include interests of the Owner, the Contractor, subcontractors and sub-subcontractors.

**23.2** Property insurance shall be on an "all-risk" or equivalent policy form and shall include, but not necessarily be limited to insurance against the perils of fire (with extended coverage) and mischief, collapse, earthquake, flood, windstorm, temporary buildings and debris removal, including demolition occasioned by enforcement of any applicable legal requirements, and shall cover necessary and reasonable expenses for the Design Professional's expenses required as a result of such insured loss.

**23.3** If the property insurance requires deductibles, the Owner shall pay costs of such deductibles.

**23.4** Boiler and Machinery Insurance. The Owner will purchase and maintain boiler and machinery insurance, which shall specifically cover such insured objects during installation and testing.

**23.5** Loss of Use Insurance. The Owner, at the Owner's option, may purchase and maintain such insurance as will insure the Owner against loss of the Owner's property due to fire or other hazards, however caused.

**23.6** Waivers of Subrogation. The Owner and Contractor waive all rights against: (i) each other and any of their subcontractors, sub-subcontractors, agents and employees, each of the other; and (ii) the Design Professional,

Design Professional's consultants, separate contractors, if any, and any of their subcontractors, sub-subcontractors, agents and employees, for damages to the Work caused by fire or other causes of loss to the extent covered by property insurance obtained pursuant to this Article or other property insurance applicable to the Work, except such rights as they have to proceeds of such insurance held by the Owner. The Owner or Contractor, as appropriate, shall require of the Design Professional, Design Professional's consultants, separate contractors, if any, and the subcontractors, sub-subcontractors, agents and employees of any of them, by appropriate agreements, written where legally required for validity, similar waivers each in favor of other parties enumerated herein. The policies shall provide such waivers of subrogation by endorsement. A waiver of subrogation shall be effective as to a person or entity even though that person or entity would otherwise have a duty of indemnification, contractual or otherwise, did not pay the insurance premium directly or indirectly, and whether or not the person or entity had an insurable interest in the property damaged. The Owner does not waive its subrogation rights to the extent of its property insurance on structures or portions of structures that do not comprise the Work.

**23.7** The Contractor authorizes the Owner to negotiate and agree on the value and extent of, and to collect the proceeds payable with respect to, any loss under a policy of insurance carried by the Owner pursuant to any of the provisions of this Article. The Owner shall have full right and authority to compromise any claim, or to enforce any claim by legal action or otherwise, or to release and discharge any insurer, by and on behalf of the Owner and Contractor. The Owner shall provide written notice to Contractor of: (i) its having reached any such settlement or adjustment with an insurer; and (ii) the receipt of any funds pursuant to this Article. Any objection by the Contractor to a settlement or adjustment made under this Article must be made in writing to the Owner within five (5) business days of the notice from the Owner. The Owner and the Contractor agree to attempt to resolve the dispute by mutual agreement.

**23.8** A loss under the Owner's property insurance shall be adjusted by the Owner and made payable to the Owner for the insureds, as their interests may appear, subject to requirements of any applicable mortgagee clause.

**23.9** The Owner shall deposit proceeds so received, in a manner in which such proceeds can be separately accounted for, which proceeds the Owner shall distribute in accordance with such agreement as the parties in interest may reach. If after such loss no other special agreement is made and unless the Owner terminates the Contract pursuant to Article 20, replacement of damaged property shall be performed by the Contractor after notification of a Change in the Work in accordance with Article 16.

**23.10** The Contractor shall pay subcontractors their shares of the insurance proceeds received by the Contractor, and by appropriate agreements, written where legally required for validity, shall require subcontractors to acknowledge the Owner's authority under this Article 23 and make payments to their sub-subcontractors in similar manner.

**23.11** Nothing contained in this Article 23 shall preclude the Contractor from obtaining, solely at its own expense, additional insurance not otherwise required.

**ARTICLE 24**  
**PERFORMANCE AND PAYMENT BONDS**

**24.1** The Contractor shall furnish separate performance and payment bonds to the Owner. Each bond shall set forth a penal sum in an amount not less than the Fixed Price Contract Amount and shall include a power of attorney attached to each bond. The signature of both the Contractor (principal) and the Surety are required. If the Surety is incorporated, both bonds must have the corporate seal. Each bond furnished by the Contractor shall incorporate by reference the terms of this Contract as fully as though they were set forth verbatim in such bonds. In the event the Fixed Price Contract Amount is adjusted by Change Order executed by the Contractor, the penal sum of both the performance bond and the payment bond shall be deemed increased by like amount. The performance and payment bonds furnished by the Contractor shall be AIA Document A312, or a standard surety form certified approved to be the same as the AIA Document A312, and shall be executed by a Surety, or Sureties, reasonably acceptable to the Owner and authorized to do business in the State of Idaho.

**24.2** Upon the request of any person or entity appearing to be a potential beneficiary of bonds covering payment of obligations arising under the Contract, the Contractor shall promptly furnish a copy of the bonds or shall permit a copy to be made.

**24.3** It is the Contractor's obligation to notify the Surety in the event of changes in the Contract Documents, which in the absence of notification might serve to discharge the Surety's obligations, duties or liability under bonds or the Contract.

**ARTICLE 25  
PROJECT RECORDS**

**25.1** All documents relating in any manner whatsoever to the Project, or any designated portion thereof, which are in the possession of the Contractor or any subcontractor of the Contractor, shall be made available to the Owner or the Design Professional for inspection and copying upon written request. Furthermore, said documents shall be made available, upon request by the Owner, to any state, federal or other regulatory authority and any such authority may review, inspect and copy such records. Said records include all drawings, plans, specifications, submittals, correspondence, minutes, memoranda, tape recordings, videos or other writings or things which document the Project, its design and its construction. Said records expressly include those documents reflecting the cost of construction to the Contractor. The Contractor shall maintain and protect these documents for no less than four (4) years after final completion or termination of the Contract or for any longer period of time as may be required by law or good construction practice.

**ARTICLE 26  
MISCELLANEOUS PROVISIONS**

**26.1** The law is hereby agreed to be the law of the State of Idaho. The parties further agree that venue for any proceeding related to this Contract shall be in Boise, Ada County, Idaho, unless otherwise mutually agreed by the parties.

**26.2** Pursuant to Section 54-1904A, Idaho Code, within thirty (30) days after award of this Contract, the Contractor shall file with the Idaho State Tax Commission, with a copy to the Owner, a signed statement showing the date of Contract award, the names and addresses of the home offices of contracting parties, including all subcontractors, the state of incorporation, the Project Number and a general description of the type and location of the Work, the amount of the prime contracts and all subcontracts and all other relevant information which may be required on forms which may be prescribed by the Idaho State Tax Commission.

**26.3** The Contractor, in consideration of securing the business of erecting or constructing public works in the State of Idaho, recognizing that the business in which it is engaged is of a transitory character, and that in the pursuit thereof, its property used therein may be without the state when taxes, excises or license fees to which it is liable become payable, agrees:

.1 To pay promptly when due all taxes (other than on real property), excises and license fees due to the State of Idaho, its sub-divisions, and municipal and quasi-municipal corporations therein, accrued or accruing during the term of this Contract, whether or not the same shall be payable at the end of such term;

.2 That if the said taxes, excises and license fees are not payable at the end of said term, but liability for the payment thereof exists even though the same constitute liens upon its property, to secure the same to the satisfaction of the respective officers charged with the collection thereof; and

.3 That, in the event of its default in the payment or securing of such taxes, excises and license fees, to consent that the department, officer, board or taxing unit entering into this Contract may withhold from any payment due it hereunder the estimated amount of such accrued and accruing taxes, excises and license fees for the benefit of all taxing units to which said Contractor is liable.

**26.4** Before entering into a Contract, the Contractor shall be authorized to do business in the State of Idaho and shall submit a properly executed Contractor's Affidavit Concerning Taxes (Exhibit D).

**26.5** Pursuant to Section 44-1002, Idaho Code, it is provided that each Contractor "must employ ninety-five percent (95%) bona fide Idaho residents as employees on any job under any such contract except where under such contracts fifty (50) or less persons are employed the contractor may employ ten percent (10%) nonresidents,



provided, however, in all cases employers must give preference to the employment of bona fide residents in the performance of said work, and no contract shall be let to any person, firm, association, or corporation refusing to execute an agreement with the above mentioned provisions in it; provided, that, in contracts involving the expenditure of federal aid funds this act shall not be enforced in such a manner as to conflict with or be contrary to the federal statutes prescribing a labor preference to honorably discharged soldiers, sailors, and marines, prohibiting as unlawful any other preference or discrimination among citizens of the United States." (Ref. Section 44-1001, Idaho Code)

**26.6** The Contractor shall maintain, in compliance with Title 72, Chapter 17, Idaho Code, a drug-free workplace program throughout the duration of this Contract and shall only subcontract work to subcontractors who have programs that comply with Title 72, Chapter 17, Idaho Code.

**26.7** As between the Owner and Contractor as to acts or failures to act, any applicable statute of limitations shall commence to run and any legal cause of action shall be deemed to have accrued in any and all events in accordance with Idaho law.

**26.8** The Contractor and its subcontractors and sub-subcontractors shall comply with all applicable Idaho statutes with specific reference to Idaho Public Works Contractors' licensing laws in the State of Idaho, Title 54, Chapter 19, Idaho Code, as amended.

**26.9** The Contractor shall not knowingly hire or engage any illegal aliens or persons not authorized to work in the United States and take steps to verify that it does not hire or engage any illegal aliens or persons not authorized to work in the United States. Any misrepresentation in this regard or any employment of persons not authorized to work in the United States constitutes a material breach and shall be cause for the imposition of monetary penalties not to exceed five percent (5%) of the Fixed Price Contract Amount per violation and/or Termination of this Contract. The Contractor also acknowledges that, if it is a natural person, it is subject to Title 67, Chapter 79, Idaho Code regarding verification of lawful presence in the United States.

**ARTICLE 27  
EQUAL OPPORTUNITY**

The Contractor shall maintain policies of employment as follows:

**27.1** The Contractor and the Contractor's subcontractors shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age or national origin. The Contractor shall take affirmative action to insure that applicants are employed, and that employees are treated during employment, without regard to their race, religion, color, sex, age or national origin. Such action shall include the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the policies of non-discrimination.

**27.2** The Contractor and the Contractor's subcontractors shall, in all solicitation or advertisements for employees placed by them or on their behalf; state that all qualified applicants will receive consideration for employment without regard to race, religion, color, sex, age or national origin.

**ARTICLE 28  
SUCCESSORS AND ASSIGNS**

**28.1** Each party binds itself, its successors, assigns, executors, administrators or other representatives to the other party hereto and to successors, assigns, executors, administrators or other representatives of such other party in connection with all terms and conditions of this Contract. The Contractor shall not assign this Contract or any part of it or right or obligation pursuant to it without prior written consent of the Owner. If Contractor attempts to make assignment without consent of Owner, Contractor shall remain legally responsible for all obligations under this Contract.

**ARTICLE 29  
SEVERABILITY**

**29.1** In the event any provision or section of this Contract conflicts with applicable law or is otherwise held to be unenforceable, the remaining provisions shall nevertheless be enforceable and shall be carried into effect.

**ARTICLE 30  
MEDIATION**

**30.1** Contractor Claims for additional cost or time are subject to Article 13, shall be reviewed as provided in accordance with that Article and, as a condition precedent to litigation, are subject to dispute resolution attempts and mediation in accordance with this Article. All other issues and disputes arising from this contract are also subject to dispute resolution attempts & mediation in accordance with this Article, as a condition precedent to litigation.

**30.2** The parties agree that resolution of any dispute or disagreement without formal legal proceedings is to their mutual benefit and to the benefit of the Project.

**30.3** The parties agree to make every reasonable attempt to resolve any issues or disputes informally. The parties further agree that prior to the institution by either of legal or equitable proceedings of any kind, and as a condition precedent thereto, any dispute between the Contractor and the Owner related to the Contract, including a dispute over the Owner's decision regarding a Claim, shall be subject to mediation as follows:

.1 If the issue to be mediated involves only a dispute regarding the Contract Time, no request to mediate shall be made unless liquidated damages have been assessed by the Owner. If the issue to be mediated involves a Claim or other financial dispute, no request to mediate shall be made unless the amount is \$50,000 or more or until there are cumulative Claims or disputes amounting to \$50,000 or more; provided, however, that a mediation request can be made as to any Claim or financial matter at any time after Substantial Completion;

.2 The party seeking mediation shall notify the other party in writing of its mediation request. In such written request, the requesting party must clearly describe the issues it believes are subject to mediation;

.3 Within fifteen (15) days of receipt of the mediation request, the non-requesting party shall respond in writing to the request;

.4 Unless the Owner and the Contractor agree to other rules for mediation, mediation shall be in accordance with the Construction Industry Rules of Arbitration and Mediation Procedures in effect at the time of the mediation;

.5 The parties shall share the mediator's fee and any filing fees equally; provided, however, that if a party makes a written request to the mediator without satisfying the requirements of this section and by doing so incurs any costs or fees, that party shall be solely responsible for the costs or fees;

.6 Unless otherwise mutually agreed to by the parties, the mediation shall be in Boise, Ada County, Idaho;

.7 The parties shall cooperate in arranging the other details of mediation, such as selection of the mediator, mediation dates and times;

.8 The parties agree that all parties necessary to resolve the matter shall be parties to the same mediation proceeding; provided, however, that no subcontractor or sub-subcontractor shall attend the mediation absent advance notice and consent from the Owner;

.9 Agreements reached in mediation shall be enforceable as settlement agreements in any court having proper jurisdiction; and

.10 Unless otherwise agreed in writing, the Contractor shall continue the Work and maintain the approved schedules during any mediation proceedings. If the Contractor continues to perform, the Owner shall continue to make payments in accordance with the Contract Documents.

30.4 If mediation fails to resolve the dispute, either party may file an action in the courts of Idaho in accordance with the venue provision contained in this Contract.

ARTICLE 31  
WAIVER OF CONSEQUENTIAL DAMAGES

31.1 The Contractor and Owner waive claims against each other for consequential damages arising out of or relating to this Contract. This mutual waiver includes:

.1 Damages incurred by the Owner for rental expenses, for losses of use, income, profit, financing, business and reputation and for loss of management or employee productivity or of the services of such persons.

.2 Damages incurred by the Contractor for principal office expenses, including the compensation of personnel stationed there; for losses of income, financing, business and reputation; loss of management or employee productivity or of the services of such persons; and for loss of profit except profit arising directly from the Work.

31.2 This mutual waiver is applicable, without limitation, to all consequential damages due to either party's termination in accordance with Articles 18 and 20. Nothing contained in this paragraph shall be deemed to preclude an award of the assessment of liquidated damages, when applicable, in accordance with the requirements of the Contract Documents.

IN WITNESS WHEREOF, the parties have executed this Contract on the dates set forth below.

OWNER

State of Idaho  
Division of Public Works

5/19/2022  
Date Executed

*BJM* By:   
Pat Donaldson, Administrator

CONTRACTOR  
Quality Electric Inc.  
5272 Irving Street  
Boise, Idaho 83706

SEAL

5/5/22  
Date Executed

By:  Signature  
JAY HINTZE Printed Name  
PRESIDENT Title

EXHIBIT AOWNER'S PROJECT IDENTIFICATION INFORMATION:

DPW Project No. 21-207  
 SUB Switchgear Replacement  
 Boise State University  
 Boise, Idaho

General Project Description: Removal and replacement of the existing 208V main switchgear located in the basement of the original SUB building.

**ADDENDA:** Addenda applicable to the Contract and made a part of are as follows:

Addendum No. One: Dated April 15, 2022

FIXED PRICE CONTRACT AMOUNT AND ACCEPTED ALTERNATES:

Base Bid Amount:

Five Hundred Fifty Seven Thousand Nine Hundred Eighty Eight and No/100 Dollars \$557,988.00

**Total Fixed Price Contract Amount:**

**Five Hundred Fifty Seven Thousand Nine Hundred Eighty Eight and No/100Dollars \$557,988.00**

Contractor's Requests for Payment are to be submitted for Work accomplished through the LAST day of each month as described in Paragraph 7.3.

TIME FOR PERFORMANCE AND LIQUIDATED DAMAGES:

A. The Contractor shall commence construction of its scope of the Work in accordance with the Notice to Proceed issued by the Owner, and which will become Exhibit F to this Contract.

B. The Contractor shall accomplish Substantial Completion as defined in Article 6 of the Contract within **Six Hundred Thirty One (631)** consecutive calendar days from the date authorized to proceed in the Notice to Proceed.

C. The amount of liquidated damages per day for each and every day of unexcused delay as outlined in Article 6 on the Contract is: **Five Hundred Dollars (\$500)**

DRAWINGS AND SPECIFICATIONS

The Owner shall furnish the Contractor **3** sets of Drawings and Project Manuals.

EXHIBIT B

**ADDRESSES and AUTHORIZED REPRESENTATIVES:** The names, addresses and authorized representatives of the Owner, the Contractor and the Design Professional are:

**OWNER:** State of Idaho  
Division of Public Works  
502 N. 4th Street  
P.O. Box 83720  
Boise, ID 83720-0072  
Pat Donaldson, Administrator

**Project Manager:** John Julian  
Telephone: (208) 332-1904  
E-mail: john.julian@adm.idaho.gov  
Fax: (208) 334-4031  
May sign for Owner: Yes  No

**Field Representative:** Bruce Berry  
Telephone: (208) 332-1915  
E-mail: Bruce.Berry@adm.idaho.gov  
Fax: (208) 334-4031  
May sign for Owner: Yes  No

**CONTRACTOR:** Quality Electric Inc.  
5272 Irving Street  
Boise, Idaho 83706  
Telephone: (208) 375-1300  
FAX: (208) 375-1329  
E-mail: jay@qeidaho.com  
Public Works Contractors License No. PWC-C-10145-unlimited-4

**Officer:** David Bradshaw Vice President (name and title)  
208-375-1300 (telephone)  
dave@qeidaho.com (E-mail)

**Contractor's Project Manager:** Darrin Allen (name)  
208-375-1300 (telephone and FAX)  
darrina@qeidaho.com (E-mail)  
May sign for Contractor: Yes  No   
Change Orders: up to: \$\_\_\_\_.00  
Construction Change Authorizations: up to: \$\_\_\_\_.00  
Contractor's Request for Payment

**Contractor's Superintendent:** Darrin Allen (name)  
208-375-1300 (telephone and FAX)  
darrina@qeidaho.com (E-mail)  
May sign for Contractor: Yes  No   
Construction Change Authorizations: up to \$\_\_\_\_.00



**DESIGN  
PROFESSIONAL:**

Musgrove Engineering, P.A.  
234 S. Whisperwood Way  
Boise, ID 83709  
(208)384-0585  
(208)384-0765

Professional's  
Project Manager:

Nick Schafer  
Professional License No. 12731  
(208)384-0585  
(208)384-0765  
nicks@musgrovepa.com

Professional's  
Field Representative:

Nick Schafer  
(208)384-0585  
(208)384-0765  
nicks@musgrovepa.com

May sign for Design Professional:

Field Reports	Yes [ X ]	No [ ]
Change Order Proposal Requests	Yes [ X ]	No [ ]
Construction Change Authorization:	Yes [ X ]	No [ ]
Construction Change Order	Yes [ X ]	No [ ]
Design Professional's Supplemental Instructions	Yes [ X ]	No [ ]
Interpretations of the Contract Documents	Yes [ X ]	No [ ]
Contractor's Request for Payment	Yes [ X ]	No [ ]
Acceptance of Substantial Completion	Yes [ X ]	No [ ]
Acceptance of final completion	Yes [ X ]	No [ ]

**EXHIBIT C****LIST OF DRAWINGS:**

- EG-0 Title Sheet / Area Maps
- E-0 Electrical Legend
- E-1 Demolition Floor Plan – Basement
- E-2 New Work Floor Plan – Basement
- E-3 New Work Floor Plan – First Floor
- E-4 Single Line Details

**LIST OF SPECIFICATIONS:**

## DIVISION 1 - GENERAL REQUIREMENTS

- 011000 - Summary
- 012500 - Substitution
- 012600 - Contract Modification Procedures
- 012900 - Payment Procedures
- 013100 - Project Management And Coordination
- 013300 - Submittal Procedures
- 014000 - Quality Requirements
- 015000 - Temporary Facilities And Controls
- 016000 - Product Requirements
- 017300 - Execution
- 017419 - Waste Management And Disposal
- 017700 - Closeout Procedures
- 017823 - Operation And Maintenance
- 017839 - Project Record Documents
- 017900 - Demonstration And Training

## DIVISION 26 – ELECTRICAL

- 21257 260500 - Electrical General Provisions
- 21257 260501 - Field Test and Operational Check.
- 21257 260502 - Short-Circuit-Coordination Study-Arc Flash Hazard Analysis
- 21257 260519 - Conductors and Cables
- 21257 260526 - Grounding
- 21257 260533 - Raceways and Boxes
- 21257 262400 - Distribution Switchboards
- 21257 262413 - Main Switchboards
- 21257 262419 - Motor Control Centers
- 21257 266000 - Electrical Demolition and Repair



EXHIBIT D

CONTRACTOR'S AFFIDAVIT CONCERNING TAXES

STATE OF IDAHO )

COUNTY OF ADA )

Pursuant to the Title 63, Chapter 15, Idaho Code I, the undersigned, being duly sworn, depose and certify that all taxes, excises and license fees due to the State or its taxing units, for which I or my property is liable then due or delinquent, has been paid, or arrangements have been made, before entering into a Contract for construction of any public works in the State of Idaho.

Quality Electric Inc.  
5272 Irving Street  
Boise, Idaho 83706

SEAL

By:

[Signature]  
\_\_\_\_\_  
(Signature)

Subscribed and sworn to before me this 5th day of May, 2022.

[Signature]  
\_\_\_\_\_  
NOTARY PUBLIC  
Residing at: Boise, ID  
Commission expires: 1-26-2028

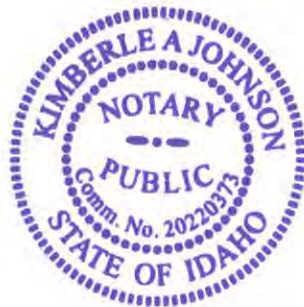




EXHIBIT E

NAMED SUBCONTRACTORS:

Pursuant to Section 67-2310, Idaho Code, commonly known as the naming law, the names and addresses of the entities who will perform the plumbing, heating and air conditioning and electrical work were named in the bid and are as follows:

Electrical (PWCL Category 1600)

Quality Electric Inc.  
5272 Irving Street  
Boise, Idaho 83706

Idaho Public Works Contractors License No. PWC-C-10145-Unlimited-4

Idaho Electrical Contractors License No. 1086C

**EXHIBIT F**

**NOTICE TO PROCEED**

TO CONTRACTOR:

DPW NUMBER:

CONTRACT DATE:

ARCHITECT:

CONTRACT AMOUNT: \$

DATE OF ISSUANCE:

OWNER:

State of Idaho

You are hereby notified to commence work on the above referenced contract on/or before \_\_\_\_\_ and are to substantially complete the work within \_\_\_\_\_ consecutive calendar days thereafter; therefore your contract completion date is \_\_\_\_\_.

The contract provides for the sum of \$ \_\_\_\_\_ as liquidated damages for each consecutive calendar day after the above established substantial completion date that the work remains incomplete. Completion date will be established by "Certificate of Substantial Completion."

You are reminded that any changes to the original contract document regarding either cost or completion date must be effected by a change order approved by this department.

Your payment estimates must be submitted on Division of Public Works forms included herein. We will be most happy to assist you in preparing the payment estimate forms.

\_\_\_\_\_ has been appointed Field Representative for this project. Please contact him at 332- \_\_\_\_\_ prior to beginning work. A pre-construction meeting will be held \_\_\_\_\_, at \_\_\_\_\_, at \_\_\_\_\_ (location)

Sincerely,

PAT DONALDSON  
ADMINISTRATOR

PD:pb

DISTRIBUTION: Tax Commission  
Division of Building Safety  
Risk Management (w/ Builder's Risk Application, if applicable)  
(Project Manager)  
Fiscal Office TAX ID xx-xxxxxxx



650 W. State Street • Room 307 • Boise, ID • 83702  
P.O. Box 83720 • Boise, ID • 83720-0037

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March 11, 2022

Mark Heil  
Vice President and Chief Financial Officer  
1910 University Drive  
Administration Building, Room A-208  
Boise, Idaho 83725-1200

RE: Replacement of Electrical Switchgear Equipment - Student Union Building

Dear Mark,

This letter is in response to your request to replace the existing electrical switchgear equipment in the Student Union Building. The total project cost is not to exceed \$999,990.00.

The State Board of Education requires executive director review and approval for the purchase of equipment, data processing software and equipment, and all contracts for consulting or professional services either in total or through time purchase or other financing agreements, between five hundred thousand dollars (\$500,000) and one million dollars (\$1,000,000). Staff has reviewed the above request, and pursuant to the authority delegated to the Executive Director under Board Policy V.I.3.a., this correspondence will confirm authorization to proceed with the agreement as requested. This authorization is predicated on the understanding that general counsel for Boise State University has reviewed and approved terms and conditions of the purchase agreements.

Sincerely,

A handwritten signature in blue ink that reads "Matt Freeman".

Matt Freeman  
Executive Director

MF/mc



**ATTACHMENT 4  
Change Order**

**Conduit, feeder, buss duct**

**Quality Electric Inc.**

5272 Irving Street  
Boise, ID 83706  
Phone: 208-375-1300  
Website: www.qeidaho.com

Division of Public Works  
502 N . 4th Street  
Boise, ID 83702-0072  
Attention: Nick Schafer/David Merrill

12 January 2023  
BSU SUB

Re: Change Order CO-0001 for: DPW-21207-BSU-SUB-Switchgear

We are pleased to quote on the above Change Order CO-0001 as follows.

1. Remove buss duct system completely including connection box.
2. Build and install 2 new custom build pull boxes.  
Run new 3" conduits from new pull box to new pull box.
3. Remove old copper cables and pull in new aluminum cables from vault to switchgear.
4. Make crimp on connections on both ends of cables.
5. Power for new sump pump in vault.

We reserve the right to correct this quote for errors and or omissions.

**Pricing:**  
For the Sum of \$377,511.00

The Change Order expires on 15 February 2023

We request an additional 0 days be added to the completion date of the project.

**CHANGE ORDER TERMS:**  
Change order terms shall not be less any less stringent than the proposal terms outlined in our original proposal to your company, unless prior language has been written into the contract / agreement executed between our two companies.

**ACCEPTANCE OF CHANGE ORDER**  
The above pricing and terms are satisfactory and are hereby accepted.  
Quality Electric Inc is authorized to do the work as specified.

Date of Acceptance: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

I would like to thank you for the opportunity to quote this Change Order. If you have any questions, please do not hesitate to reach out for further clarification.

Sincerely,

*Darrin Allen*  
Darrin Allen  
Quality Electric Inc.

**CONSENT**  
**APRIL 25, 2023**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Conference Space Agreement – Especially for Youth (EFY), LLC

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.I.6.b.

**BACKGROUND/DISCUSSION**

Boise State University (BSU) provides conference space and services to various entities during the Summer, when its facilities are not fully utilized. BSU seeks to offer conference services for Brigham Young University's For the Strength of Youth (FSY) conference (offered through its Especially For Youth (EFY) program) from May 27, 2023 to July 22, 2023.

The FSY program is a world-wide, week-long Church of Jesus Christ of Latter-day Saints conference for high school students, held on college campuses each summer. BSU has provided a proposal to EFY to host the program, which includes room and board for students and faculty, in addition to University facility and space usage. For the 6-week, 8-session program, BSU will charge nearly \$2 million dollars, with revenue to be dispersed across participating university divisions.

**IMPACT**

The FSY conference, including conference space and services, is expected to gross no less than \$1,778,400. As importantly, it creates an opportunity for prospective students to familiarize themselves with campus.

**ATTACHMENTS**

Attachment 1 – Conference Agreement

**STAFF COMMENTS AND RECOMMENDATIONS**

This agreement estimates over 3,000 campers between May and July and appears to be a good use of university resources during the summer.

Staff recommends approval.

**BOARD ACTION**

I move to approve the request by Boise State University to enter into a Conference Agreement with EFY, LLC to provide conference space and services for the 2023 For the Strength of Youth Conference held from May 27, 2023 to July 22, 2023.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_



## BOISE STATE UNIVERSITY

### CONFERENCE AGREEMENT

EFY, LLC; For the Strength of Youth Conference

This Agreement is made by and between Boise State University, a state of Idaho public institution of higher education (the “University”), by and through its University Events program, and EFY, LLC a Delaware nonprofit limited liability company which is contracted by The Church of Jesus Christ of Latter-day Saints to provide operational services in support of the Church’s religious **For the Strength of Youth Conference (“FSY”) Program** (“Sponsor”).

#### SECTION ONE: LODGING AND EVENT SPACE RESERVATIONS

1.1 University coordinates conference services including housing, event space, dining, audio/visual, and other services as necessary for University units and authorized, external third parties, including Sponsor who seeks to utilize the University’s housing for summer camps and/or conferences or similar engagement (sometimes referred herein as Sponsor’s “Event”). Sponsor shall be responsible for the supervision and oversight of all of its camp or conference participants, counselors, employees, agents, or any other person on University property at Sponsor’s express or implied invitation during Sponsor’s Event (collectively, the Sponsor’s “Group” and each individually an attendee, participant or Group member).

1.2 Sponsor acknowledges that it has reviewed, understands and agrees to abide by the applicable University policies, guidelines, and guest information published at <https://www.boisestate.edu/guesthousing/> and <https://www.boisestate.edu/eventservices/guidelines/>, each of which is incorporated herein by this reference. In the event of conflict between this Agreement and any University policies, guidelines, and guest information, this Agreement prevails. For clarity, the University acknowledges that although FSY activities includes group activities include religious speech and are likely to fall within the [University Policy 1100](#) definitions of *3.5 Disruptive Noise* and *3.11 Plainly Audible* sound, none of the standard FSY program activities constitute *3.4 Disruptive Activity*. For further clarity, Sponsor acknowledges and agrees to support University’s Event Services endorsement/sponsorship guidelines, namely, that use of University space for FSY does not imply endorsement or sponsorship by Boise State University.

1.3 Reservations are confirmed and lodging and event space is guaranteed when Sponsor and University execute this Conference Agreement. University will reserve rooms and event space based on the Proposal attached hereto as **Exhibit A** (“Proposal”). Sponsor may request changes to the count by communicating such changes to University sixty (60) days prior to the check-in date specified on the reservation request (or otherwise agreed to by University). As of sixty (60) days prior to the check-in date, Sponsor shall be responsible for the reserved space and associated fees agreed to at that time regardless of the number actual attendees, unless other arrangements have been agreed to in writing by University. University may modify Sponsor’s residence hall and/or lodging or event space assignments to accommodate changes in size or number of Sponsor’s Group.

1.4 University will make hall and room assignments, and event space reservations, based on Sponsor’s request, the availability of the residence hall or event space, the size of the Event, and the ratio of minors to adults. Sponsor is not guaranteed exclusive occupancy of any residence hall or event space. Unless otherwise agreed between Sponsor and

University, University reserves the right to assign multiple camps or conferences to the same or several residence halls or event spaces.

1.5 The University seeks to create an environment free from undue noise. Quiet hours are daily from 10:00PM to 7:00AM. University reserves the right to terminate the Agreement or request removal of any Group member following excessive noise complaints (more than three per stay).

1.6 Unless alternative arrangements are agreed to by University, Sponsor must assure all attendees arrive no sooner than the check-in date and depart no later than check-out date specified in Sponsor's reservation confirmation issued by University. Late departure is not permitted, however, in the event a late departure occurs, Sponsor will be charged the applicable nightly rate plus a two-hundred dollar (\$200.00) per person, per night, as a holdover charge until proper check-out and departure is completed. Early arrivals without prior arrangements may be accommodated if space is available and will be charged the applicable nightly rate plus an additional charge of one-hundred-twenty-five (\$125.00) per person. The space available or provided to an attendee in the event of early arrival or late departure may not be the same space the guest is or was assigned during their assigned visit.

1.7 Furnishings provided may vary based on type of housing assigned, and are more fully described on the Summer Guest Housing website, located at <https://www.boisestate.edu/guesthousing/> and incorporated fully herein by this reference.

1.8 Sponsor shall advise University promptly of any issue of disrepair in the rooms, common areas of the residential halls, or reserved event spaces. Sponsor shall keep all sleeping rooms, common areas and reserved event spaces clean and free of debris.

1.9 Sleeping rooms must be locked when unoccupied. The University will issue one key and/or key card to each individual assigned a room and access cards for buildings as applicable. During the Event, Sponsor must report any lost key card or building access card to University immediately. Sponsor must return all keys and access cards during check-out.

1.10 Sponsor and Sponsor's Group must remove all camp or conference materials, trash, and any other personal belongings or property from all sleeping rooms, common areas and event spaces upon check-out. The residence halls should be left in neat and orderly condition and all linens folded and left atop the bed in each room. The rooms and floors should be free of debris and any trash cans should be emptied. If room configurations are altered during the camp or conference, the rooms must be returned to their original configuration by check-out. Sponsor is encouraged to participate in any pre and post-inspection of Sponsor's rooms. If Sponsor is unable to attend at the required time, sponsor may not dispute damage charges assessed during inspection. Pictures shall be provided for any large damage being charged to Sponsor.

1.11 Sponsor shall be responsible for any damage to residence hall, sleeping rooms, event space, or other University property caused by Sponsor or Sponsor's Group. Sponsor shall pay for the costs of any repairs, cleaning, additional housekeeping, or supplemental maintenance charges that the University incurs because of misuse, abuse, or destruction of University property.

1.12 If any of Sponsor's Group fails to remove personal property, the University may remove and store such property at the Sponsor's expense for a period not to exceed thirty (30) days. If Sponsor has not claimed property within the time designated, the University may dispose of the property and shall not be liable to the Sponsor or any attendee from Sponsor's Group for any damages arising from this action. Sponsor further agrees to be financially responsible for the recovery of any such property and for any expenses incurred by the University associated with such, including a trash or property removal fee, if applicable.

1.13 The University respects the Sponsor and Sponsor's Group's right to privacy. However, the University reserves the right to enter the any member of Sponsor's Group's rooms (i) at any time without prior notice for health, safety, or welfare emergencies, or (ii) with reasonable notice and coordination with Sponsor's personnel, for routine or requested maintenance in or outside of the Sponsor's Group's rooms, and/or to ensure compliance with University policies. Sponsor agrees to cooperate fully with University personnel and understands that such inspection or

maintenance may entail noise and/or inconvenience.

1.14 All University staff members are Boise State University officials. Guests are required to comply with lawful orders or reasonable requests from any University official. Verbal, physical, or emotional abuse directed at any staff member or guest will not be tolerated. The offender may be immediately removed from campus housing, in the University’s reasonable discretion, in which event Sponsor will continue to be responsible for all charges and fees.

**SECTION TWO: CHARGES AND PAYMENTS**

2.1 Sponsor agrees to be responsible for all payments and any other costs and expenses, including room rates and incidental charges or additional services requested and incurred, as a result of or relating to Sponsor’s Event or otherwise relating to Sponsor’s Group. All guest rooms are subject to State and local taxes. All groups staying on campus for less than 30 consecutive days are required to pay these taxes. Organizations that are exempt from State and local taxes must submit an Idaho ST-101 tax exempt certificate prior to event quote being approved. This form must be approved by Boise State University and once approved tax will be removed from the quote for approval. All documentation will be attached to this agreement.

2.2 Unless otherwise agreed to in writing between Sponsor and University, Sponsor agrees to pay the applicable rates and charges listed on the Proposal.

2.3 Sponsor shall pay upon execution of this Agreement, or has paid, a deposit equal to fifty percent (50%) the total estimated cost of Sponsor’s booking to confirm booking minus the administrative fee provided above. Lodging and event space is not confirmed and reserved until the deposit and administrative fee have been paid.

2.4 Sponsor is responsible for damage other than normal wear and tear caused by Sponsor or its Group members to University facilities and property, as well as loss or damage to keys and access cards. In order to recoup University’s costs for such damages, Sponsor will be charged \$35.00 for each lost, broken, or bent key, and \$75.00 for lost exterior/interior door access cards. In addition, lost or severely damaged linen will be replaced at \$50.00 per bed and excessive cleaning will be charged at \$150.00 per attendee requiring excessive cleaning services. Staff time spent addressing damages or substantial changes to requested services will be charged at the hourly rate of \$25.00 per hour (with a minimum of two hours) plus the cost of any materials and supplies used or repairs made. If damages must be addressed outside regular business hours, an after-hours charge may also be assessed. These amounts will be itemized on the final invoice.

2.5 University will invoice Sponsor for all remaining costs, charges, or services, including any damages or substantial changes to requested services, within sixty (60) days’ of the check-out date. Sponsor agrees to pay all charges due within thirty (30) days’ of the date of the invoice. Sponsor hereby acknowledges and agrees that, after this date, the Sponsor will incur and owe a late fee equal to \$200.00 for each additional thirty-day period the invoice remains unpaid in whole or in part. Payments must be made in the form of check drawn within the United States, money order, wire transfer, or as otherwise directed by the University. Card transactions can be requested but all fees associated with these transactions are the responsibility of the Sponsor.

2.6 Sponsor must provide written notice of any cancellation of an Event. Cancellations received ninety (90) days or more before the first check-in date will incur no cancellation fee. Sponsor will incur a cancellation fee as provided in the table below for any subsequent cancellation. In the instance a cancellation fee is necessary, the paid deposit minus the non-refundable administrative fees will be applied before final billing. Sponsor is expected to pay the cancellation fee within 7 days’ of its written notice of cancellation. If canceled prior to 90 days, their refundable deposit will be returned via check within sixty days of the date of cancellation notice, minus any non-refundable fees.

<b>Cancellation Date</b>	<b>Fee</b>
Cancellation within 90 days of May 27, 2023	\$2,000
Cancellation within 60 days of May 27, 2023	30% of full cost
Cancellation within 30 days of May 27, 2023	50% of full cost



2.7 Notwithstanding the above, in the case the Event is or becomes prohibited or space is made unavailable because of a public health order, national or state declaration of emergency, or other unforeseen occurrence as reasonably determined by University, cancellation fees will not apply. In this instance, the non-refundable administration fee and deposit can be applied toward a rescheduled Event or refunded in entirety. Further, should any part of the University necessary to the Event be destroyed by fire or any other cause or should casualty or occurrence render the fulfillment of the Agreement by the University impossible, the Agreement shall terminate and the Sponsor shall pay for its use of said facilities and services, if any, only up to the time of said termination. Sponsor and its participants hereby waive any claim for damages should the Agreement be terminated by the University for any reason beyond the University's reasonable control.

**SECTION THREE: ADDITIONAL SERVICES**

3.1 Meals shall be provided to Guest members in accordance with the Proposal. The University has contracted dining service operations which provide board dining, retail food sales, catering, concessions, and vending. Unless otherwise agreed upon in advance, no food or beverages may be served or sold on campus unless provided by the University contracted dining services provider. Food and beverage for individual consumption is permitted. Other exceptions must be requested in advance. Please review the Catering Guidelines at <https://www.boisestate.edu/eventservices/catering-guidelines/> and contact University Event Services to coordinate or request additional food and beverage services.

- The parties hereby agree in advance upon an exception to the above provisions and guidelines for pizza night: Sponsor has permission to bring in pizza from a third-party vendor.

3.2 Upon request, University shall arrange overnight parking needs, or other transportation options, through the Department of Public Safety for Group's stay on campus. Requests for parking arrangements or other transportation options should be made not less than ten (10) business days prior to the Event. The University has numerous options for parking on campus, which are more fully described on the Event Parking website, located at <https://www.boisestate.edu/publicsafety-transportation/event-policies/> and incorporated herein by this reference. University shall submit the request for parking on behalf of Sponsor and include the cost on Sponsor's final invoice. Final charges invoiced will be based on the number of parking permits ordered. Parking is subject to availability and prior approval by University's Department of Public Safety.

3.3 Upon request, University shall arrange for audio-visual services in reserved event spaces. Audio-visual equipment, personnel needs, and goals should be communicated to University at the time of the reservation request, and no later than fourteen (14) days prior to the Event. Sponsor may bring and use its own audio-visual equipment, provided, however, that University shall not be responsible for the care, operation, support or maintenance of Sponsor's equipment.

3.4 Custodial services will consist of cleaning private bathrooms prior to the start of the scheduled arrival and after Group's departure. Public areas will be cleaned weekly, with the exception of weekends and holidays. In addition, toilet paper will be provided in all public and private bathrooms; additional toilet paper is available at the front desk at no cost. Sponsor and its attendees are expected to keep all rooms reasonably kept and return all rooms in a same or similar condition, ordinary wear and tear excepted.

3.5 Unless otherwise agreed, Sponsor's participants shall bring their own linens. Neither linens nor linen service is included. In the event a participant wishes to separately rent linens, the package shall include two sheets, one blanket, one pillowcase, one pillow, one towel, one washcloth. Linen service will include placement of linens in the bedroom (or other designated area for pickup). Beds will not be made. A limited number of additional blankets will be made available to Sponsor upon request and subject to availability through the front desk. Group shall not remove any linen from any University facility.

3.6 Residence hall common spaces and exterior grounds immediately surrounding the halls may be scheduled for use at no cost depending on location and availability. These spaces cannot be secured. The University is not responsible for the loss or damage to any personal property as a result of using these spaces or exterior grounds and cannot guarantee exclusiveness. Noise restrictions still apply in all outdoor and indoor common areas and spaces.

3.7 The University has exclusive rights for retail operations on campus. All retail sales require prior written approval

from the Director of the BroncoShop. All written requests should be submitted in advance, no later than sixty (60) days prior to the date of the event. Contact University for the proper forms and documents.

3.8 Additional services may be available from other units of the University and will be provided at the rates and charges provided by those units and may be subject to additional agreements or additional terms and conditions.

**SECTION FOUR: SUPERVISION**

4.1 Boise State University does not assume Custody and Control of minors and does not provide supervision services. Sponsor must assume all supervision and responsibility for Group members, including minors on campus, for purposes of Sponsor’s Event. Any use of University’s campus where the responsibility for Custody and Control of the Minor participant(s) is assumed by Sponsor requires Sponsor’s compliance with University’s Protection of Minors Policy (Policy 12060) (<https://www.boisestate.edu/policy/campus-security-and-safety/protection-of-minors/>). For purposes of the policy and this Agreement, “minor” is defined as “any person under the age of eighteen (18)” and the terms “Custody and Control” means that Sponsor retains custody and control of all minors by “accepting supervision over and responsibility for Minors in the absence of their parent(s) or other legal guardian(s).” Specifically, Sponsor shall abide by the following:

4.1.1 Conduct background verification on Sponsor’s employees, volunteers, and representatives. These background verifications must be at least as stringent as those conducted by the University on individuals covered under University’s Background Verifications Policy (Policy 7005). Background verifications and training must be completed at least forty-eight (48) hours prior to the start of Sponsor’s Event. Sponsor must submit a certification of compliance with the background verification and training to University. University may request any additional information deemed necessary to meet the requirements of the Protection of Minors Policy.

4.1.2 Ensure Sponsor’s employees, volunteers, and representatives complete Minor Abuse prevention training that meets or exceeds the minimum requirements as outlined in Section 4.3.4 of University’s Protection of Minors Policy. Further, Sponsor must report Minor Abuse immediately if suspected. Minor Abuse is defined as “the infliction of physical injury, sexual abuse or exploitation of a Minor (whether by an adult or another Minor); negligent treatment or maltreatment of a Minor; or abandonment of a Minor. This includes the failure to make reasonable efforts to prevent Minor Abuse as well as emotional injury.” Minor Abuse should be reported to either law enforcement or the Idaho Department of Health and Welfare. See University’s Protection of Minors Policy for details.

4.1.3 Have standards of conduct designed to prevent the Abuse of Minors, which standards shall be available to University upon request.

4.2 At least 14 days prior to the Event, Sponsor shall register the Event with the Office of Institutional Compliance and Ethics at <https://www.boisestate.edu/compliance/non-university-program-activity-registration-form/>.

4.3 Violations of Section Four of this Agreement, including any violations of University’s Protection of Minors Policy, may result in exclusion from the University, termination of this Agreement, and/or other measures.

**SECTION FIVE: HEALTH AND SAFETY, APPLICABLE POLICIES**

5.1 The health and safety of all persons on University property is essential. Sponsor and Sponsor’s Group shall abide by all applicable University policies (including any procedures, regulations, and guidelines), and all applicable local, state, and federal laws, regulations, and ordinances at all times. Sponsor hereby agrees to share any applicable information with all Group members, including Minors’ parents or legal guardians, and agrees to abide by University Policies, available at <https://www.boisestate.edu/guesthousing/guest-information/policies-2/>, which are incorporated herein, as well as all Housing and Residence Life Community Standards (available here: <https://www.boisestate.edu/housing/housing-help-center/policies-and-standards/community-standards/>) which are incorporated herein. However, in the event of a conflict between these Policies and Standards and this Agreement, this Agreement shall take precedence. In addition to the foregoing, Sponsor is permitted to apply Sponsor’s policies and procedures regarding Sponsor’s employee and participant housing, in accordance with applicable law.

5.2 In an effort to minimize risk of infection and help slow the spread of COVID-19 and other infectious illness, the University’s Public Health Office has issued and will continue to issue campus-wide health guidance (the “Public Health Guidance”) applicable to use of University’s campus and facilities, including University housing. The Health

Guidance is updated from time to time and available here: <https://www.boisestate.edu/publichealth/covid-19-response/> In addition, the University may advise Sponsor of additional guidelines applicable to Sponsor's use of University spaces at any time prior to or during the conference or camp ("Public Health Requirements"). Sponsor must, and must require all Group members, to comply fully with any and all Public Health Guidance or Public Health Requirements at all times Sponsor and any of Group Members are present on the campus or utilizing facilities of University.

5.3 All University Policies applicable to the use of University's campus and facilities are fully applicable to Sponsor and all Group members. University policies are available on the University's website, <https://www.boisestate.edu/policy/>, and are incorporated into this Agreement.

5.4 Without limiting the foregoing, Sponsor and participants must comply with the following:

5.4.1 In accordance with the Smoke and Tobacco-Free Campus Policy (Policy 9110), the entire Boise State University campus is smoke-free. Smoking and use of tobacco products is prohibited on-campus and in University owned vehicles.

5.4.2 Under Idaho state law, firearms are prohibited in any residence hall, unless possessed by a qualified law enforcement officer or retired law enforcement officer. All other weapons are also generally prohibited on campus, subject to few exceptions. See University Possession of Firearms/Weapons on University-Owned or -Controlled Premises (Policy 12080). Included in the prohibition is weapons being stored in vehicles on University grounds. Weapons may be immediately confiscated by the Boise City Police Department, Campus Security Officers and/or other University employees. Individuals found in violation of this policy may be removed and excluded from campus.

5.4.3 The possession, manufacturing, distribution, use or sale of drugs or drug paraphernalia is prohibited on University grounds and buildings. This includes illicit and misuse of prescription drugs. The odor of a drug that can be identified by two or more individuals is enough to reasonably determine use. Security or police may be involved and immediate termination of housing privileges may result for Sponsor and/or its participants.

5.4.4 Idaho state law prohibits the use and distribution of alcohol to any person under the age of 21. For the safety and welfare of all members of the community we expect responsible drinking behaviors of those of legal drinking age. Common sources of alcohol and/or devices intended for the rapid consumption of alcohol is prohibited at all times in all areas. Consumption of alcohol in public spaces is strictly prohibited. This includes, but is not limited to lawns, courtyards, parking lots, lounges, hallways, walkways, etc. Open containers are not allowed in public spaces. Consequences for violating the alcohol policies may include, but not limited to, disposal of all alcoholic products, removal from housing, and/or referral to Security and/or Police. Parental and/or guardian notification for those under the age of eighteen (18) may occur for those found in violation of this policy.

5.4.5 Participating in dangerous pranks, hanging or climbing outside of windows, balconies, roofs, or other conduct that creates unreasonable risk of harm to a person or property is strictly prohibited.

5.4.6 Tampering, damaging, or inhibiting the use of fire/safety equipment which includes blocking designated fire exits, smoke detectors, alarms, sprinklers, fire doors, and fire extinguishers, in addition to the intentional act of setting a fire is a violation of state law, and University regulations. All Group members MUST leave the facility immediately when a fire alarm sounds. Group members will not be permitted to reoccupy until the University or fire officials reauthorize occupancy. In addition, all occupancy standards set by the University and/or State are to be observed.

5.4.7 No sidewalks, doors, passages, or ways of access to or through facilities or to any other part of the University shall be obstructed or left unsecured by the Sponsor or Sponsor's Group. Propping of doors to avoid access card use is a security risk and not permitted.

5.5 Discrimination and harassment are prohibited by University policy. Any allegations of discrimination or harassment will be addressed in accordance with University's Non-Discrimination and Anti-Harassment Policy (Policy 1060), Nondiscrimination on the Basis of Disability Policy (Policy 1075), and/or Sexual Harassment, Sexual Misconduct, Dating Violence, Domestic Violence, and Stalking (Policy 1065), as applicable and may result in one or more Group member's removal from University housing, termination of Event participation, and/or potential legal action. In addition to the foregoing, Sponsor is permitted to apply Sponsor's own policies and procedures with regard to discrimination and harassment, in accordance with applicable law. Sponsor and/or any Group member found responsible for violation of these policies (or other applicable University policies) may have this Agreement and/or housing options terminated immediately and without warning, at discretion of the University.

5.7 Sponsor should report any emergencies by calling 911 or by activating a blue emergency phone around campus. Non-emergency suspicious behavior or criminal complaints should be reported to the Department of Public Safety, (208) 426-6911. In the event of any emergency within University housing, Sponsor must immediately notify University personnel. University staff will assume authority for response and will enact appropriate emergency procedures. The University will involve law enforcement, medical personnel, and/or chaperone's if applicable depending on the situation involved.

5.8 All applicable University policies, Public Health Guidance, Public Health Requirements, and other local, state, and federal, regulations concerning health, safety, and public order in the State of Idaho, the County of Ada, the City of Boise, and the University shall be observed, including without limitation those specified in this Agreement. If Sponsor or any Group member fails to comply with the foregoing, the University may terminate this Agreement in whole or in part at any time. In the event of termination for failure to comply with said regulations, Sponsor shall be liable to the University for all charges and expenses incurred to date and the amount provided above under cancellation fee (utilizing the termination date in lieu of the cancellation date) shall be owed as liquidated damages.

## SECTION SIX: LIABILITY RELEASE AND INDEMNIFICATION

6.1 **Sponsor assumes all reasonable risks associated with its use of a University residence hall, University event spaces, or any other area of University's campus or property, as well as any dining or other services. Sponsor knowingly and voluntarily waives and releases the University, the Idaho State Board of Education, the State of Idaho, and each of their respective officers, agents, employees, and representatives (each a "University Party" and collectively, the "University Parties") from all past, present, and future claims of any type for any harm or loss, including but not limited to, economic loss, personal injury, disease, death, or property damage arising out of or related to this Agreement, Sponsor's Event, and Sponsor's use of a University residence hall, University event spaces, or any other area of the University's campus or property, as well as any dining or other services ("Losses") except to the extent that the Losses arise from the gross negligence, breach of this Agreement, violation of law, or willful misconduct of one or more of the University Parties. To the extent permitted by law, Sponsor agrees to indemnify, hold harmless, and forever covenant not to sue any University Party for any claims, liabilities, or expenses, including without limitation damages, personal injury, death, medical expenses, disability, lost wages, loss of capacity, property damage, court costs, attorneys' fees, or any other loss of any kind ("Claims"), except to the extent that the Claims arise from the gross negligence, breach of this Agreement, violation of law, or willful misconduct of one or more of the University Parties. Sponsor acknowledges and agrees that this assumption of risk, waiver and release, indemnification, and hold harmless shall be binding on Sponsor and its agents, representatives, heirs and assigns.**

6.2 Sponsor shall maintain, or cause to be maintained, insurance policies or alternative policies, which may include a program of self-insurance or alternative risk transfer, of the types and in the amounts described below. Sponsor shall provide University with a certificate evidencing required insurance coverages and naming University as additional insured within thirty (30) days from execution of this Agreement. All policies, except Worker's Compensation, shall name the following Certificate Holder as an additional insured:

State of Idaho and Boise State University  
Attn: Risk Management  
1910 University Drive  
Boise, Idaho 83725

Should any of the above-described policies be canceled before the expiration date thereof, notice will be delivered in accordance with the policy provisions. Failure of Certificate Holder to demand a certificate or other evidence of full compliance with these insurance requirements or failure of Certificate Holder to identify a deficiency from evidence that is provided shall not be construed as a waiver of Sponsor's obligation to maintain such insurance. By requiring this insurance, University does not represent that coverage and limits will necessarily be adequate to protect University, and such coverage and limits shall not be deemed as a limitation on Sponsor's liability.

6.2.1 Commercial General Liability Insurance. Commercial general liability (CGL) with a limit of not less than \$1,000,000 each occurrence and \$2,000,000 aggregate.

6.2.2 Professional Liability. Left Blank Intentionally

6.2.3 Workers' Compensation. All statutorily required Workers' Compensation coverages to include Employer's Liability at minimum limits of \$100,000/\$100,000/\$500,000.

6.2.4 The requirements stated in this Section 6.2, may be waived or modified in a writing signed by the University's Risk Manager.

6.2.5 In the event Sponsor is a governmental entity as defined by the Idaho Tort Claims Act, Idaho Code, Title 6, Chapter 9, as may be modified from time to time (the "ITCA"), Sponsor's liability, if any, for any damages, losses, or costs arising out of related to acts performed by Sponsor or its employees acting within the scope of their employment is governed by ITCA, where applicable, and the insurance requirements provided in Sections 6.2.1 through 6.2.2, are not applicable. For sake of clarification, Sponsor shall still provide a certificate of insurance evidencing satisfactory insurance coverages to University as required above, but shall not be required to name University as an additional insured.

6.3 In the event Sponsor is a state agency of the State of Idaho, including any unit or department of the University, Sections 6.1 and 6.2 shall be not be applicable, and shall be void. In lieu thereof, the following liability provision shall apply:

6.3.1 Sponsor assumes all risk associated with Sponsor's Event as well as with Sponsor's use of a University residence hall, University event space, or any other area of the University's campus or property, as well as any dining or other services, by Sponsor or any Group member. The parties understand that each is covered with respect to third party tort liability by the State of Idaho, Department of Administration, Risk Management Program utilizing the Retained Risk Account. This is a plan of liability coverage provided by and subject to provisions of the Idaho Tort Claims Act, and the Department of Administration, Risk Management statutes. The parties agree that any third-party tort liability claim, suit or loss resulting from or arising out of the parties' performance of any activities under this Agreement shall be allocated to one or both parties by the Department of Administration, Risk Management Program ("Risk Management") for purposes of loss experience and subsequent allocation of agency premium assessments. Each party shall notify Risk Management and the other party in the event it receives notice or knowledge of any claim(s) arising out of the performance of, or activities under, this Agreement. Each party shall be liable to the other for damage to property of the other caused by such party in the performance of this Agreement or any related task order. If the damaged property (including vehicles) is covered by property or auto coverage through Risk Management, then Risk Management shall charge the damage or loss to the responsible party, and the responsible party shall be responsible for the deductible, if any. In the event of damage to either party's property in the performance of this Agreement for which it is unclear which party was at fault or caused such damage, then each party shall be responsible for their own property. Each party shall notify Risk Management and the other party in the event it receives notice or knowledge of any claim(s) arising out of the performance of, or activities under, this Agreement.

6.4 The University is a State of Idaho public institution of higher education and as such, maintains a program of self-insurance pursuant to the ITCA. Through the program of self-insurance, the University maintains liability coverage for its maximum exposure under ITCA of \$500,000. The University's liability, if any, for any damages, losses, or costs arising out of related to acts performed by University or its employees acting within the scope of their employment is governed by ITCA, where applicable. Nothing in this Agreement shall be deemed a waiver of any defense, protection or limitation of liability afforded the University under ITCA. Nothing in this agreement shall be construed as a waiver of University's sovereign immunity or any other immunity, defense, damages, remedy or claim the University may assert because of its status as a State of Idaho institution of education. The University assumes no liability for any act or omission of Sponsor, Sponsor's Event, or any of Sponsor's Group. The University assumes no liability for the theft, destruction, or loss of any of Sponsor's or Sponsor's Group's personal property, whether left secured or unsecured in a residential hall or other area of campus.

**SECTION SEVEN: MISCELLANEOUS PROVISIONS**

7.1 This Agreement shall commence effective as of the last date signed by a party hereto ("Commencement Date") and shall continue for a period of twelve calendar months (the "Initial Term") unless sooner terminated by either Party as specified in this section. The Parties may renew this Agreement for additional terms upon mutual written agreement specifying the renewal term (each, a "Renewal Term" and together with the Initial Term, the "Term"). This Agreement may be terminated by either Party, with or without cause, upon thirty (30) days' written notice, subject to the cancellation provisions hereof in the event of a cancelation of an Event.

7.2 Sponsor must conform to University's Brand Standards, available at <https://www.boisestate.edu/communicationsandmarketing/brand-standards/>, with regard to any use of University's name or logo ("University Marks"). Sponsor shall be permitted to utilize University Marks, as provided in University's brand standards, for purpose of such advertising or informing potential conference attendees of the Event and its location. Any other use of University's Marks is subject to prior written approval by University.

7.3 This Agreement shall be construed in accordance with and governed by the laws of the State of Idaho without regard to its conflict of laws principles. Any action to enforce the provisions of this Agreement shall be brought in State district court in Ada County, Boise, Idaho. Each party hereby consents to personal jurisdiction and service in such State courts.

7.4 The Parties are independent contractors. Nothing in this Agreement shall create an agency, partnership, employment relationship, fiduciary or special relationship, joint venture, or any other form of joint enterprise between Sponsor and the University.

7.5 If any provision of this Agreement is declared invalid or unenforceable by judicial determination or otherwise, such provision shall not invalidate or render unenforceable the entire Agreement; rather, the Agreement shall be construed as if not containing the particular invalid or unenforceable provision or provisions and the rights and obligations of the parties shall be construed and enforced accordingly.

7.6 No delay or failure by either party to exercise any right, remedy or power herein shall impair such party's right to exercise such right, remedy or power or be construed to be a waiver of any default or an acquiescence therein, and any single or partial exercise of any such right, remedy or power shall not preclude any other or further exercise thereof or the exercise of any other right, remedy or power. No waiver hereunder shall be valid unless set forth in writing and executed by the waiving party.

7.7 Nothing in this Agreement, express or implied, is intended to or shall confer upon any person or entity other than the Parties any right, benefit or remedy or any nature whatsoever under or by reason of this Agreement.

7.8 Neither party may assign this Agreement, or any of its interests or obligations in connection with this Agreement, without the prior written consent of the other party. This Agreement shall apply to and bind the successors and permitted assigns of the parties.

7.9 This Agreement, and the published policies, guidelines and information referenced and incorporated herein, constitutes the complete and entire agreement of the parties relating to the subject matter hereof, and supersedes any and all prior written and oral agreements or understandings relating to such subject matter, including any conflicting terms set forth in any exhibits hereto. This Agreement may be modified or amended only by a writing executed by both parties.

7.10 Neither party will be in default or otherwise liable for any delay in or failure of its performance under this Agreement if such delay or failure arises by any reason beyond its reasonable control, including any act of God, any act of warfare or terrorism, earthquakes, floods, fires, epidemics, riots, or failures or delays in transportation or communications. The parties agree to promptly inform and consult with each other to the extent reasonable possible as to any of the above causes which, in the judgment of either party, could be or is the cause of a delay or failure of performance of this Agreement.

7.11 University is a government entity and this Agreement shall in no way or manner be construed so as to bind or obligate the State of Idaho or University beyond the term of any particular appropriation of funds by the Idaho State Legislature as may exist from time to time. University reserves the right to terminate this Agreement in whole or in part (or any order placed under it) if, in its sole judgment, the Legislature of the State of Idaho fails, neglects, or refuses to appropriate sufficient funds as may be required for the Institution to continue such payments, or requires any return or "give-back" of funds required for the University to continue payments or operations necessary to perform this Agreement, or if the Executive Branch of the State of Idaho mandates any cuts or holdbacks in spending impacting University's ability to perform its obligations hereunder. All affected future rights and liabilities of the parties hereto shall thereupon cease within ten (10) calendar days after notice to Sponsor.

7.12 This Agreement may be executed in one or more counterparts, with signatures delivered by electronic signatures, fax or emailed PDF documents with subsequent delivery of original signatures, all of which counterparts when taken together will comprise one document.

7.13 Each party agrees that the electronic signatures, whether digital or encrypted, of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as manual signatures. Electronic Signature, for this Agreement, means any electronic sound, symbol, or process attached to or logically associated with a record and executed and adopted by a party with the intent to sign such record, including facsimile

or email electronic signatures.

7.14 Sponsor hereby certifies that it is not currently engaged in, and will not for the duration of the Agreement, as amended from time to time, engage in, a boycott of goods or services from Israel or territories under its control.

7.15 Except to the extent this Agreement is a contract or commercial transaction that is subject to a federal law related to Medicaid or a contract with a hospital as defined in Idaho Code, Section 39-1301, Sponsor represents it is not an abortion provider or an affiliate of an abortion provider, as those terms are used in Idaho Code Section 18-8703. In addition, except to the extent this Agreement is a contract or commercial transaction that is subject to a federal law related to Medicaid or a contract with a hospital as defined in Idaho Code, Section 39-1301, the Parties agree that no funds provided hereunder shall be used in any way to provide, perform or induce an abortion; to assist in the provision or performance of an abortion; to promote abortion; counsel in favor of abortion; refer for abortion; or provide facilities for abortion or training to provide or perform abortion, other than as permitted by Idaho Code Section 18-8705.

7.16 Any notices required to be sent to a party pursuant to this Agreement shall be delivered to the Party in person, or sent to the Party by certified or registered mail or by nationally recognized overnight courier to the Party at the Party's address specified below, or such other address as may from time to time be designated by such Party in writing. If to Boise State University:

Heather Lile, Director, University Events  
Boise State University  
Address: 1910 University Drive, Boise, Idaho 83725  
Phone: (208) 426-1642  
Email: heatherlile@boisestate.com

With copy to:

Office of the General Counsel  
Boise State University  
1910 University Drive  
Boise, Idaho 83725-1203

If to Sponsor:

Tyler Hansen, Sr. Strategic Sourcing Supervisor  
Address: 701 E. University Parkway, 103 HCEB, Provo, UT 84602  
Phone: 801-422-3472  
Email: Tyler\_hansen@byu.edu

[Remainder of Page Left Intentionally Blank – Signatures Follow]

IN WITNESS WHEREOF, the undersigned are duly authorized to execute this Agreement on behalf of the University or Sponsor.

**SPONSOR**

By: \_\_\_\_\_

Date: \_\_\_\_\_

Tyler Hansen  
Senior Strategic Sourcing Supervisor

**BOISE STATE UNIVERSITY**

By: \_\_\_\_\_

Date: \_\_\_\_\_

Alicia Estey  
Chief Financial and Operating  
Officer and Vice President for  
Finance and Operations



**EXHIBIT A**

*See Attached.*

Hello Jason,

Boise State University is pleased to provide the following draft proposal in response to your request to host multiple sessions of For the Strength of Youth (FSY) on campus during the summer of 2023. Six weeks, with a total of eight individual sessions, have been identified to serve 3,450 individuals (3,040 campers and 410 staff).

Please note that this draft is a proposal for discussion purposes based on our current pricing and availability, not a binding agreement. Final terms, including required deposits and session minimums, will be negotiated as part of the formal contracting process. The final agreement may be subject to State Board of Education approval.

Proposed dates, prices, and the number of individuals per session are outlined below.

<b>FY23 BOISE STATE PROPOSAL   FOR THE STRENGTH OF YOUTH</b>					
<b>PROGRAM DATES</b>	<b>STAFF</b>	<b>CAMPERS</b>	<b>MAXIMUM CAPACITY</b>	<b>SESSION PRICE</b>	<b>PENDING VENUES</b>
May 27-June 3 *	50	350	400	\$204,750	Special Events Center
June 3-June 10 **	40	310	350	\$181,350	Stueckle Sky Center
June 17-June 24 *	40	310	350	\$181,350	Stueckle Sky Center
June 24-July 1 A	60	440	500	\$257,400	Student Union
June 24-July 1 B	60	440	500	\$257,400	Student Union
July 8-July 15 A	60	440	500	\$257,400	Student Union
July 8-July 15 B	60	440	500	\$257,400	Student Union
July 15-July 22	40	310	350	\$181,350	Stueckle Sky Center
<b>8 programs in 6 weeks</b>	<b>410</b>	<b>3040</b>	<b>3,450</b>	<b>\$1,778,400</b>	<b>Multiple</b>
<p><b>PRICE FOR 8 PROGRAMS = \$1,778,400 (exclusions apply)</b>  <b>AVERAGE PRICE PER CAMPER = \$585 (represents fixed and variable expenses)</b></p> <p><i>*Program coincides with federal holiday closure.</i></p> <p><i>**Potential for noise disruption from simultaneous football camp in Albertsons Stadium for the Stueckle Sky Center.</i></p>					

**Included (for each session)**

- **Event space:** main session space large enough to accommodate all participants (5 days Monday - Friday); 2-3 additional, separate breakout spaces large enough to

accommodate attendees simultaneously (5 days Monday - Friday); headquarters/training space for non-campers (7 days Saturday - Friday); outdoor dance location (2 days Tuesday and Friday); general use of grounds for dispersed meetings

- **Event Equipment:** standard furnishings for all indoor meeting spaces (tables and chairs)
- **Accommodations:** each camper (5 nights, Monday check-in) and each staff member (7 nights, Saturday check-in) to be housed in shared double or greater occupancy rooms in on-campus residences. This does not include bedding packs, which would be an additional cost if campers elect not to bring their own (typically sleeping bags and pillows).
- **Meals:** each camper (4 breakfasts, 4 lunches, 5 dinners per FSY program schedule) and each staff member (6 breakfasts, 7 lunches, 7 dinners per FSY program schedule) in the campus dining hall or other identified event space with hot catered buffet; catered, bagged meals may be substituted during lunch periods.

Conference and event space will generally be assigned within spaces designed to optimize the attendee experience, such as within the Student Union, Special Events Center, Stueckle Sky Center and/or comparable spaces on campus. Facilities named in this draft proposal shall be confirmed closer to the program dates.

Meals will be served in campus dining halls (Southfork or Buster's Kitchen) or appropriate indoor/outdoor spaces to be confirmed closer to the program dates.

### **Exclusions**

This proposal excludes estimated costs for elective goods and services such as audiovisual equipment and services, parking, bedding packs, equipment delivery labor to outdoor spaces, holiday labor surcharges, technical support, taxes, and other a la carte charges. Such costs will be invoiced separately from the contracted amount.

### **Pricing & Adjustments**

Prices in this proposal are for event space, meals, and accommodations only and reflect nonprofit discounting where offered, subject to receipt of the reserving party's 501(c)(3) documentation. Tax-exempt status will be honored where applicable pending review of documentation and state tax law.

### **Next Steps**

Please let me know if this proposal is agreeable based on your event needs. If so, the next step in this process is for me to route this proposal to our Office of General Counsel to prepare a contract. I look forward to hearing from you soon.

Best regards,

Heather Lile

**CONSENT**  
**APRIL 25, 2023**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Boise State University (BSU) Six-Year Capital Construction Plan Amendment

**REFERENCE**

August 2022

The Idaho State Board of Education (Board) approved Boise State University Six-Year Capital Construction Plan (FY2024 - FY2029)

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.K.2

**BACKGROUND/DISCUSSION**

Boise State University's in-depth evaluation of facility needs, opportunities, and rising construction costs determined that modifications and the addition of new projects in the university's current Six-Year Capital Construction Plan (the "Plan") are required. To keep the Board apprised of these planning efforts and consistent with V.K.2.c, the university is requesting approval of an amended Plan.

New projects added to the plan include the MCMR Metal-Organic Chemical Vapor Disposition project at \$1,500,000; the addition of the Micron Center for Materials Research - Third Floor Buildout project at \$7,000,000; and the HML Addition and Renovation at \$7,000,000.

In addition, the First Year Student Housing Project estimated cost was increased from \$60,000,000 to \$70,000,000; the Athletics Facilities and Title IX Upgrades estimated cost was increased from \$6,500,000 to \$10,000,000; and the Albertsons Stadium project title was changed from "East and North Expansion and Improvements" to "North End Zone Expansion" and the estimated cost was increased from \$27,000,000 to \$32,000,000.

**IMPACT**

Amendments to the Plan will allow the University, with appropriate Board approvals, to proceed with fundraising, planning and/or construction of the newly added and amended projects.

**ATTACHMENTS**

Attachment 1 – Amended Six-Year Capital Plan (FY2024 – FY2029)

**BOARD STAFF COMMENTS AND RECOMMENDATIONS**

Board Policy V.K. provides that institutions under the governance of the Board shall submit to the Board for its approval a six-year capital construction plan ("Plan"). The Plan must include only capital construction projects for which the total cost is estimated to exceed \$1,000,000. A Plan provides notice to the Board that an institution may bring a request at a later date for approval of projects

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included in the Plan, but Board approval of a Plan does not constitute approval of projects included in the Plan. Projects must be on the approved six-year capital construction plan prior to an institution soliciting or committing funds for projects estimated to exceed \$1,000,000.

Staff recommends approval.

**BOARD ACTION**

I move to approve the amended Six-Year Capital Construction Plan for Boise State University as submitted in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

SIX-YEAR CAPITAL IMPROVEMENT PLAN								
FY 2024 THROUGH FY 2029 (Revised April 2023)								
Institution: Boise State University								
Project Title	Est. Cost	Prev. Fund.	FY2024	FY2025	FY2026	FY2027	FY2028	FY2029
			Total	Total	Total	Total	Total	Total
MCMR Metal-Organic Chemical Vapor Disposition (MOCVD)	1,500,000		1,500,000					
Construction Management Building*	6,000,000		6,000,000					
Faculty and Staff Housing Development*	10,000,000		4,000,000		6,000,000			
First Year Student Housing	70,000,000	4,500,000	65,500,000					
Athletic Facilities and Title IX Upgrades	10,000,000		10,000,000					
Micron Center for Materials Research - Third Floor Buildout	7,000,000			7,000,000				
Lusk Area Development*	10,000,000			10,000,000				
Science Building	110,000,000		30,000,000	80,000,000				
University Drive Improvements	4,800,000			2,550,000	2,250,000			
Albertsons Stadium - North End Zone Expansion	32,000,000		2,500,000	29,500,000				
Graduate Program Expansion	1,500,000			1,500,000				
Parking Structure	50,000,000			25,000,000		25,000,000		
Student Academic and Welcome Center	90,000,000			40,000,000		50,000,000		
HML Addition and Renovation	7,000,000			7,000,000				
Kinesiology Annex Pool Removal	3,000,000				3,000,000			
Upper Grade Level Student Housing*	10,000,000					10,000,000		
Hemingway Building - Remodel and Renewal	5,800,000					5,800,000		
Campus Operations Building - Phase 2	8,600,000						8,600,000	
Riverfront Hall - Remodel and Renewal	20,500,000						20,500,000	
Morrison Center Improvements	45,000,000						45,000,000	
Health Sciences Building	55,000,000							55,000,000
<b>Total</b>	<b>557,700,000</b>	<b>4,500,000</b>	<b>119,500,000</b>	<b>202,550,000</b>	<b>11,250,000</b>	<b>90,800,000</b>	<b>74,100,000</b>	<b>55,000,000</b>

\*Project may entail a non-State Entity and/or public-private partnership delivery model.

**Other Projects to Consider**

Athletics Master Village Projects

**CONSENT**  
**APRIL 25, 2023**

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**UNIVERSITY OF IDAHO**

**SUBJECT**

Issuance of Two Five-Year Contracts Pursuant to ABA Accreditation Requirements for the Law Clinic Faculty in the College of Law

**REFERENCE**

December 2006	Idaho State Board of Education Approval of Multi-Year Contract for College of Law Clinical Faculty
December 2011	Renewal of Multi-Year Contract for College of Law Clinical Faculty

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section II.G Policies Regarding Faculty

**BACKGROUND/DISCUSSION**

In 2006, the Board of Regents approved a five-year contract for a U of I clinical law faculty member to satisfy ABA accreditation requirements to have the law clinic be predominantly staffed with faculty who have a status reasonably similar to tenure as defined by the above guidance. That faculty member has retired and the Law Clinic has expanded. To remain in compliance of this requirement, the law clinic must award two clinical faculty members five-year contracts. The contract, attached, provides at paragraph 2.5 a process for review of performance and recommendation regarding renewal. This process follows the university policy for post-tenure review. This request seeks authorization to hire two existing clinical faculty in the U of I Law Clinic with this type of contract.

The University of Idaho College of Law is accredited by the American Bar Association (Section of Legal Education and Admissions to the Bar) and by the Association of American Law Schools. Accreditation by the American Bar Association is essential to the viability of the College of Law and to secure the right of its graduates to take bar examinations in any state of the United States.

Accreditation by the American Bar Association is governed by the ABA's "Standards for Approval of Law Schools." Standard 405(c) provides as follows:

A law school shall afford to full-time clinical faculty members *a form of security of position reasonably similar to tenure*, and non-compensatory perquisites reasonably similar to those provided other full-time faculty members. A law school may require these faculty members to meet standards and obligations reasonably similar to those required of other full-time faculty members. However, this Standard does not preclude a limited number of fixed, short-term appointments in a clinical program



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predominantly staffed by full-time faculty members, or in an experimental program of limited duration. [Emphasis supplied.]

This standard is further explained in Interpretation 405-6 as follows:

*A form of security of position reasonably similar to tenure includes a separate tenure track or a program of renewable long-term contracts. ... A program of renewable long-term contracts shall provide that, after a probationary period reasonably similar to that for other full-time faculty, during which the clinical faculty member may be employed on short-term contracts, the services of a faculty member may be either terminated or continued by the granting of a long-term renewable contract. For the purposes of this Interpretation, "long term contract" means at least a five-year contract that is presumptively renewable or other arrangement sufficient to ensure academic freedom. During the initial long-term contract or any renewal period, the contract may be terminated for good cause, including termination or material modification of the entire clinical program. [Emphasis supplied.]*

The University does not have a specific policy for multi-year contract, it applies Board policy II.G. (specifically II.G.1.b and II.G.5.) as well as employment policies applicable to all faculty contracts. With respect to the proposed contract templates, the University has applied policy II.G. in the context of the ABA requirement for "position security reasonably similar to tenure" as follows:

- II.G.1.b:
  - the proposed contracts seek a 5 year term and the University seeks approval of the Board (1.b.(1));
  - the contract is executed by the University Provost the President's designee for faculty contracts (1.b.(2));
  - the University will provide a fully executed copy for the next Board meeting (1.b.(3));
  - University Policy (FSH 3320) requiring annual performance evaluations for all faculty applies to the faculty under the proposed contract template. This policy includes consequences for failure to meet expectations, up to and including termination for cause;
  - Section 2.2 of the proposed contract template allows for termination for adequate cause as defined by Board policy (See Board policy II.L.)
  - Section 2.3 of the proposed contract template allows for termination in the event of financial exigency declared by the Board (See Board Policy II.N).
  - Sections 2.4 and 2.5 of the propose template address renewal/non-renewal in a manner consistent with Board policy II.G.5. as follows:
    - Section 2.4 sets out the renewal will only occur upon written offer and acceptance between the University and the faculty and subject to Board approval;
    - Section 2.5 describes the means by which the University will determine whether to offer renewal, which will be done in a manner consistent with

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the University's treatment of tenured faculty. This gives the faculty notice now, five years in advance of any non-renewal, of the process.

**IMPACT**

The University will be able to adequately staff the Law Clinic and remain in compliance with the ABA Accreditation Standard 405.

**ATTACHMENTS**

Attachment 1 – Proposed Contract Template

**BOARD STAFF COMMENTS AND RECOMMENDATIONS**

Board Policy II.G.:

- Allows for institutions to implement multi-year contracts for certain classifications of non-tenure track faculty members.
- Allows for institutions to implement policies allowing for multi-year contracts for certain classifications of non-tenure track faculty members.
- Provides for requirements for such institution policies regarding multi-year contracts which include the following:
  - no contract of appointment may exceed three (3) years without prior Board approval;
  - all multi-year employment contracts shall be approved in writing by the institution's Chief Executive Officer or designee; and
  - employment is subject to satisfactory annual performance review with informal review at the end of each semester.
- Requires that a multi-year contract state that it may be terminated at any time for adequate cause, as defined in Section II.L. of Board policy, or when the Board declares a state of financial exigency, as defined in Section II.N. of Board policy. The contract shall also state that it may be non-renewed pursuant to Section II.G.5. of Board policy.

The proposed contract has a 5 year term which requires Board approval. The proposed contract allows for discipline or termination for cause, and for termination as a result of financial exigency and meets the requirements of Board Policy II.G.

Staff is aware of the ABA accreditation requirement. University officials will be prepared to discuss any further implications of the requirement. Staff recommends approval.

**BOARD ACTION**

I move to approve the request by the University of Idaho to approve two five-year contracts for clinical faculty in the College of Law Clinic to remain in compliance with ABA staffing standards in substantial conformance to Attachment 1 in the materials presented to the Board.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**EMPLOYMENT AGREEMENT**

This Employment Agreement (Agreement) is entered into by and between the University of Idaho (University), and NAME (Employee).

ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University will employ Employee as [INSERT College of Law TITLE HERE], a full-time, academic year, non-tenure track faculty position. Except as otherwise provided in this Agreement, Employee remains subject to all University and Regents policies generally applicable to employees of his classification.

1.2. Reporting Relationship. Employee will report and be responsible directly to [INSERT Name of DIRECT SUPERVISOR] and to the Dean of the College of Law (Dean). Annual performance evaluations will be conducted in accordance with standard University and College of Law policies.

1.3. Duties and Performance. Employee’s duties will be as described in the position description attached as **Exhibit A**. The SUPERVISOR, in consultation with Dean and Employee, will review and, if appropriate, modify the position description on an annual basis in accordance with University and College of Law policies.

1.4. Compensation and Benefits. Employee will be paid at an academic year salary rate of \$X and will be eligible for University and College changes in employee compensation, if any, in accordance with applicable guidelines. Salary will be paid in bi-weekly installments on the usual paydays of the University. Employee will be eligible for University benefits generally applicable to employees of the particular classification.

ARTICLE 2

2.1. Term. This Agreement is for a fixed-term appointment of five (5) years, commencing on X date and terminating on Y date aligning with the fiscal year, without further action by either party, unless sooner terminated in accordance with other provisions of this Agreement.

2.2. Discipline or Termination for Adequate Cause. During the term of this Agreement, Employee may be disciplined or terminated for adequate cause, as defined by Regents and University policies, and in accordance with the process set forth in the University’s Faculty-Staff Handbook.

2.3. Termination Due to Discontinuance or Material Modification of Program. During the term of this Agreement, Employee may be terminated as a result of a declared financial exigency, program closure, or if the College discontinues or materially modifies the clinical programs or external programs.

2.4. Renewal. This Agreement is renewable solely upon an offer from the University and an acceptance by Employee, both of which must be in writing and signed by the parties. A written offer of employment would be made by the College of Law and accepted by the Employee, subject to Board approval. This Agreement in no way grants to Employee a claim to tenure in employment.

2.5 Process for Renewal. In the fourth year of appointment, a review of [the employee's] performance while in the long term contract will be done following the process outlined in FSH 3320 B-4 a-d which is also the process followed for post-tenure review. Upon completion of the review, the committee will submit the summary report and make a recommendation to the dean of the college of law regarding the renewal of the contract for another five year term. Then the necessary paperwork will be prepared for the University to submit the request to the State Board of Education.

### ARTICLE 3

3.1 Board Approval. This Agreement will not be effective until and unless approved by the University's Board of Regents and fully executed by both parties as set forth below. In addition, the payment of any compensation pursuant to this Agreement will be subject to the approval of the University's Board of Regents, the President, and the Dean; the sufficiency of legislative appropriations; the receipt of sufficient funds in the account from which such compensation is paid; and Board of Regents and University rules regarding financial exigency.

3.2 Assignment. Neither party may assign its rights or delegate its obligations under this Agreement without the prior written consent of the other party.

3.3 Waiver. No waiver of any default in the performance of this Agreement will be effective unless in writing and signed by the waiving party. The waiver of a particular breach in the performance of this Agreement will not constitute a waiver of any other or subsequent breach. The resort to a particular remedy upon a breach will not constitute a waiver of any other available remedies.

3.4 Severability. If any provision of this Agreement is determined to be invalid or unenforceable, the remainder of the Agreement will not be affected and will remain in effect.

3.5 Governing Law. This Agreement will be subject to and construed in accordance with the laws of the state of Idaho. Any action based in whole or in part on this Agreement will be brought in the courts of the state of Idaho.

3.6 Oral Promises. Oral promises of an increase in annual salary or of any supplemental or other compensation will not be binding upon the University.

3.7 Force Majeure. Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes therefor, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the

Employment Agreement University of Idaho/Law Clinic Faculty on Five Year Contract Page x of y

reasonable control of the party obligated to perform (including financial inability), will excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

3.8 Notices. Any notice under this Agreement will be in writing and be delivered in person or by public or private courier service (including U.S. Postal Service Express Mail) or certified mail with return receipt requested or by facsimile. All notices will be addressed to the parties at the following addresses or at such other addresses as the parties may from time to time direct in writing:

the University:

Dean  
College of Law  
University of Idaho  
P.O. Box 442321  
Moscow, Idaho 83844-2321

with a copy to:

[SUPERVISOR of Employee if other than  
Dean]  
University of Idaho  
P.O. Box 442322 , Moscow, Idaho 83844-  
2322

the Employee:

Last known address on file with University's  
Human Resources

Any notice will be deemed to have been given on the earlier of: (a) actual delivery or refusal to accept delivery, (b) the date of mailing by certified mail, or (c) the day facsimile delivery is verified. Actual notice, however and from whomever received, will always be effective.

3.9 Headings. The headings contained in this Agreement are for reference purposes only and will not in any way affect the meaning or interpretation hereof.

3.10 Binding Effect. This Agreement is for the benefit only of the parties hereto and will inure to the benefit of and bind the parties and their respective heirs, legal representatives, successors and assigns.

3.11 No Third Party Beneficiaries. There are no intended or unintended third party beneficiaries to this Agreement.

3.12 Entire Agreement; Amendments. This Agreement constitutes the entire agreement of the parties and supersedes all prior agreements and understandings with respect to the same subject matter. No amendment or modification of this Agreement will be effective unless in writing, signed by both parties, and approved by University's Board of Regents.

3.13 Opportunity to Consult with Attorney. Employee acknowledges that he has had the opportunity to consult and review this Agreement with an attorney. Accordingly, in all cases, the language of this Agreement will be construed simply, according to its fair meaning, and not strictly for or against any party.

Approved by the Board of Regents on the \_\_\_\_ day of \_\_\_\_\_, 20XX.

UNIVERSITY OF IDAHO

\_\_\_\_\_

Brian Foisy, Vice President for Finance and Administration

Date: \_\_\_\_\_

EMPLOYEE

\_\_\_\_\_

Date: \_\_\_\_\_

Approved by:

\_\_\_\_\_

Torrey Lawrence, Provost and Executive Vice President

Date: \_\_\_\_\_

\_\_\_\_\_

Johanna Kalb, Dean  
College of Law

Date: \_\_\_\_\_

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS**  
**APRIL 25, 2023**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Online Bachelor of Project Management

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section III.G. and Section V.R.

**BACKGROUND/DISCUSSION**

Boise State University proposes to offer a Bachelor of Project Management program (BPM), to be offered utilizing an online program fee. The program will operate under the guidelines of Board Policy V.R. as it pertains to wholly online programs. The asynchronous, interdisciplinary Bachelor of Project Management program is designed to prepare students to readily transition into project management positions. The program is distinctly unique to the State of Idaho as no other state institution has a similar program. Students completing the program will be exceptionally prepared to fill a significant increase in workforce demand in a wide range of industries including businesses, human resources, communications management, and technology. Students will have the option to graduate with a Bachelor of Project Management (without an emphasis), or complete specialized courses to graduate with an emphasis in Business Management, Communications Management, Cyber Security, or Public Health.

**IMPACT**

The employment demand for project management skills and credentials crosses multiple industry sectors and aligns with various academic disciplines. The program has a strong potential to strengthen the university's service to both business and military communities. The development of the program was done in close consultation with the Western Idaho Chapter of Project Management Institute (PMIWIC), which includes the creation of a new program where BPM students are placed with a mentor from the PMIWIC. The program includes both in-class and documented experiential learning opportunities in preparation for the Project Management Professional certification exam at, or shortly after, completion of the program.

No additional resources are needed for the administration of the program as the program will be overseen by existing resources in the College of Arts and Sciences. Minimal resources will be needed to offer new courses within the program. Existing courses from established programs have been incorporated into the curriculum to minimize instructional costs. Part-time faculty with professional expertise in project management will be hired to teach new courses in the program. It is expected that student credit hours revenue will be sufficient to cover these costs. The financial impact is \$25,919 - \$99,296 of one-time funds over a four-year period.

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS**  
**APRIL 25, 2023**

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The student fees will be in accordance with the Online Program Fee as defined in Board Policy V.R., 3.a.x. The price-point for the online Bachelor of Project Management program fee will be \$375 per credit. For the 120 credits required for completion of the proposed program, the total cost will be \$45,000.

**ATTACHMENTS**

Attachment 1 – Bachelor of Project Management Proposal

**STAFF COMMENTS AND RECOMMENDATIONS**

Boise State University anticipates five initial enrollments in year one and projects that the program will reach 47 by the fifth year, graduating approximately 17 students per year once the program is up and running. Because the program will be using the online program fee model, minimum enrollments are based on course registrations. This includes 47 annual credits and 1.56 annual FTEs in Year 1 and 94 annual credits and 3.14 annual FTEs by Year 5. Boise State University provides that programs operating under the online program fee model are expected to be fiscally sustainable. If enrollments are not met, the university will adjust to reflect actual activity and will evaluate annually. If the degree is not fiscally sustainable in the long term, the degree will be discontinued.

Boise State University's request to offer a Bachelor of Project Management is consistent with their Service Region Program responsibilities and their current institution plan for Delivery of Academic Programs in Region III. In accordance with Board Policy III.Z, no institution has the statewide program responsibility specifically for business project management programs. Currently no other institution has a similar program per BSU's program proposal.

The proposal completed the program review process and was presented to the Council on Academic Affairs and Programs on April 6, 2023; to the Instruction, Research, and Student Affairs on April 13, 2023; and to the Business Affairs and Human Resources on April 12, 2023.

**BOARD ACTION**

I move to approve the request by Boise State University to create an online Bachelor of Project Management, as presented in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to approve the request by Boise State University to charge an online program fee of \$375 per credit for the online Bachelor of Project Management in conformance with the program budget submitted to the Board in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_





FULL PROPOSAL FORM

Academic Degree and Certificate Program

Date of Proposal Submission:	January 12, 2023 (modified March 8, 2023)		
Institution Submitting Proposal:	Boise State University		
Name of College, School, or Division:	College of Arts and Sciences		
Name of Department(s) or Area(s):			
Official Name of the Program:	Bachelor of Project Management		
Implementation Date:	Fall 2023		
Degree Information:	Degree Level: Undergraduate	Degree Type: Bachelor	
CIP code (consult IR /Registrar):	52.0211		
Method of Delivery: Indicate percentage of face-to-face, hybrid, distance delivery, etc.	Fully Online with an Online Program Fee		
Geographical Delivery:	Location(s)	Region(s)	
Indicate (X) if the program is/has: (Consistent with Board Policy V.R.)	Self-Support fee	Professional Fee	X Online Program Fee
Indicate (X) if the program is: (Consistent with Board Policy III.Z.)	Regional Program Responsibility	Statewide Program Responsibility	

Proposed Action

- New program offering**
  - Undergraduate program
  - Graduate program
  - Undergraduate certificate (30 credits or more)
  - Graduate certificate (30 credits or more)
- New branch campus or change in location**

- Modification of Existing Academic Programs**
  - Converting one program option to a stand-alone program
  - Consolidating two or more undergraduate programs into one
  - Consolidating two or more graduate programs into one
  - Splitting an existing program into two or more programs
  - Program expansion outside an institution's Designated Service Region as defined in Board Policy III.Z.
  - Adding certificate or degrees to existing programs

Leslie Durham

Leslie Durham (Dec 23, 2022 09:30 MST) 12/23/2022  
College Dean Date

Graduate Dean/other (as applicable) Date

Jo Ellen DiNucci 01/06/2022  
Jo Ellen DiNucci (Jan 6, 2023 13:28 MST)

FVP/Chief Fiscal Officer Date

John Buckwalter 01/04/2023  
John Buckwalter (Jan 4, 2023 10:30 MST)

Provost/VP for Instruction Date

[Signature] 01/11/2023

President Date

Vice President for Research (as applicable) Date  
[Signature] 3/10/2023

Academic Affairs Program Manager, OSBE Date

Chief Financial Officer, OSBE Date

TJ Bliss 3/10/23

Chief Academic Officer, OSBE Date

SBOE/Executive Director or Designee Date  
Approval

**Before completing this form, refer to Board Policy Section III.G., Postsecondary Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program. All questions must be answered.

### **Rationale for Creation or Modification of the Program**

- 1. Describe the request and give an overview of the changes that will result.** What type of substantive change are you requesting? Will this program be related or tied to other programs on campus? Identify any existing program that this program will replace. If this is an Associate degree, please describe transferability.

Boise State University proposes the creation of a wholly online program that will award a Bachelor of Project management. The proposed program will utilize the Institutional Online Program Fee outlined in SBOE Policy V.R.

The Bachelor of Project Management program is designed to prepare students to readily transition into project management positions. This includes both in-class and documented experiential learning opportunities in preparation for the Project Management Professional (PMP) certification exam at the, or shortly after, completion of the program. Students completing this program will be exceptionally prepared to fill a significant increase in workforce demand in a wide range of industries including business, human services, communications management, and technology. Students will have the option to graduate with a Bachelor in Project Management (without an emphasis) or complete specialized courses to graduate with an emphasis in *Business Management, Communications Management, Cyber Security, or Public Health*. (See Appendix A for a full list of the emphasis curriculum)

The proposed program is an asynchronous, interdisciplinary degree that aligns with the multidisciplinary project management framework established by the Project Management Institute (PMI). Project management is an interdisciplinary skill set that is applicable across a multitude of industries. As such, an experiential component has been integrated into the curriculum that requires two years and allows up to three years of documented real-world project management experience. The combination of project management education and experience gained during the proposed degree will establish a well-defined path for students to earn their bachelor's degree and immediately sit for the Project Management Professional (PMP) certification exam.

- 2. Need for the Program.** Describe evidence of the student, regional, and statewide needs that will be addressed by this proposal to include student clientele to be served and address the ways in which the proposed program will meet those needs.
  - a. Workforce and economic need:** Provide verification of state workforce needs that will be met by this program. Include job titles and cite the data source. Describe how the proposed program will stimulate the state economy by advancing the field, providing research results, etc.

The employment demand for project management skills/credentials crosses multiple industry sectors and aligns with various academic disciplines. Approximately 1.6M unique job postings in the U.S. from March 2021 - March 2022 required or preferred a bachelor's degree in combination with project management skills or certification. Of the 1.6M unique job postings, ~1.4M postings either require/prefer either (i) a bachelor degree in specific academic, or (ii) a "bachelor's degree" in no specific discipline but have a combination of qualifications such as Project Management Professional (PMP) certification, Certified

Associate in Project Management (CAPM), Project Management Information Systems (PMIS), or equivalent industry-specific certification(s) such as Cybersecurity certifications, Six Sigma, software-specific qualification, or other similar reports from the Project Management Institute. Our proposed programs serve both sets of workforce demand.

The U.S. workforce demand for project managers with a bachelor’s degree has a gradual upward trend spanning from ~8K job postings per month in April 2017 to ~18K in March 2022, with ~186,000 unique job postings from March 2021 - March 2022 (Job Posting Analytics PM U.S. report, Lightcast (formerly EMSI). Of the 186,00 job postings, ~46,500 require or prefer PMI’s Project Management Professional (PMP) certification.

Job Titles:

- Project Manager Specialist (SOC 13-1082)

2021 National Employment Matrix Title and Code		Employment		Job Openings Due to Growth and Replacement Needs 2021-2031
		2021 (in thousands)	2031 (in thousands)	
Project Manager Specialist	13-1082	781.4	837.6	70.4
<b>TOTAL</b>				<b>70.4</b>

2020-2030 Idaho Long Term Employment Projections		Employment		Job Openings Due to Growth and Replacement Needs 2020-2030
		2020	2030	
Project Management Specialists & Business Operations Specialists, All Other	13-1198	3082	3217 <sup>1</sup>	283
<b>TOTAL</b>				<b>283</b>

**b. Student demand.** What is the most likely source of students who will be expected to enroll (full-time, part-time, outreach, etc.). Provide evidence of student demand/ interest from inside and outside of the institution.

There are four different types of students who will enter this program.

- The career starter who is new to the field

<sup>1</sup> See here for Project Management Institute (PMI) reports <https://www.pmi.org/the-project-economy/reports>

- The career advancer who is already employed in the field and is interested in moving up in the field
- The degree finisher who has previous college experience that fits within the field, but has not yet finished a degree
- The career changer who is currently employed in a different field and is interested in changing fields

This program has a strong potential to strengthen the university's service to both business and military communities. The development of this program was in close consultation with the Western Idaho Chapter of Project Management Institute (PMIWIC). This includes the creation of a new program where students in Project Management program are placed with a mentor from the PMIWIC. This program is distinct from the multiple potential internship opportunities the Bachelor of Project Management program and the PMIWIC can accomplish.

The Bachelor of Project Management program provides an opportunity to further serve military service members who are seeking to enhance their career with the skills and outcomes proposed by the program. It will enhance the current relationship with our in-state military education partners in the following ways:

1. Adds a flexible pathway for baccalaureate completion - The curriculum was intentionally built to be adaptable and in collaboration with local military education center leadership to meet the needs of service members currently stationed at Mountain Home AFB, Gowen Field, and at other installations nationwide/worldwide.
2. Applies relevant military experience towards the degree - It will offer significant Credit for Prior Learning opportunities for students so service members can document previous project management experience in preparation for the Project Management Professional certification exam.
3. Additional Transfer Agreement - The necessary documentation will be submitted for this program to be considered for the Air University's Associate to Baccalaureate Cooperative program, which allows for easy transferability from the Community College of the Air Force to Boise State.

**c. Societal Need:** Describe additional societal benefits and cultural benefits of the program.

The exceptional growth in the workforce signals a related demand in the contemporary need for management processes as projects increasingly involve people from multiple organizations, multiple divisions within an organization, and from different countries and cultural contexts working together to complete projects on time and within budget. Our program requirements ensure that students are prepared both for foundational project processes as well as these complexities.

**3. Program Prioritization**

Is the proposed new program a result of program prioritization?

Yes \_\_\_\_\_ No X

If yes, how does the proposed program fit within the recommended actions of the most recent program prioritization findings.

**4. Credit for Prior Learning**

Indicate from the various cross walks where credit for prior learning will be available. If no PLA has been identified for this program, enter 'Not Applicable'.

The program is likely to have students with a wide range of professional experience who want to apply for Credit for Prior Learning. This includes students working in business industries and students with military experience in project management. Students are also likely to have experience with project management from industries that are less anticipated – e.g., library management, or managing media production teams.

To support students as best as possible, this program will use a 1-credit course offered by the Interdisciplinary Professional Studies program, *IPS 301- Prior Learning Portfolio Development*. This course supports students in assembling their professional portfolio for Credit for Prior Learning assessment. In completing this course, any student may earn up to 18 credits for prior learning.

**5. Affordability Opportunities**

Describe any program-specific steps taken to maximize affordability, such as: textbook options (e.g., Open Educational Resources), online delivery methods, reduced fees, compressed course scheduling, etc. This question applies to certificates, undergraduate, graduate programs alike.

We will offer this program at a very market-competitive rate of \$375 per credit hour. Students are able to conduct their experiential learning in their local area. Students are able to finish this degree in four semesters.

**Enrollments and Graduates**

**6. Existing similar programs at Idaho Public Institutions.** Using the chart below, provide enrollments and numbers of graduates for similar existing programs at your institution and other Idaho public institutions for the most past four years.

Instit	Program Name	Fall Headcount Enrollment in Program				Number of Graduates From Program (Summer, Fall, Spring)			
		FY__	FY__	FY__	FY_ (most recent)	FY__	FY__	FY__	FY_ (most recent)
N/A	N/A (See question # 7 below)								

**7. Justification for Duplication** (if applicable). If the proposed program is similar to another program offered by an Idaho public higher education institution, provide a rationale as to why any resulting duplication is a net benefit to the state and its citizens. Describe why it is not feasible for existing programs at other institutions to fulfill the need for the proposed program.

None of the Idaho state institutions have a similar program.

- 8. Projections for proposed program:** Using the chart below, provide projected enrollments and number of graduates for the proposed program:

<b>Proposed Program: Projected Enrollments and Graduates First Five Years</b>										
<b>Program Name: Bachelor of Project Management</b>										
<b>Projected Fall Term Headcount Enrollment in Program</b>					<b>Projected Annual Number of Graduates From Program</b>					
Fall 2023	Fall 2024	Fall 2025	Fall 2026	Fall 2027		FY24 (first year)	FY25	FY26	FY27	FY28
5	14	26	40	47		0	2	6	11	17

- 9. Describe the methodology for determining enrollment and graduation projections.** Refer to information provided in Question #2 “Need for the Program” above. What is the capacity for the program? Describe your recruitment efforts? How did you determine the projected numbers above?

The program’s size will be scaled to demand for the program. The numbers in the table above reflect a reasonable and attainable scaling up of the program based on expected student demand and program capacity.

Student services include both student support staff and faculty. Marketing, recruitment, and advising efforts will be managed by the Enrollment and Student Services experts in Extended Studies and in coordination with other online programs. Faculty will maintain close contact with students and support them in their learning and instructor contact.

- 10. Minimum Enrollments and Graduates.**

- a.** What are the minimums that the program will need to meet in order to be continued, and what is the logical basis for those minimums?

Because the program will be utilizing the online fee model, it is best to put minimum enrollment in terms of course registrations, which are what translate to revenue. Based on estimated expenses for instruction and for support personnel expenses, the estimate for the minimum number of course registrations to achieve break-even is:

- Year 1: Annual credits 47, Annual FTEs 1.56
- Year 2: Annual credits 83, Annual FTEs 2.78
- Year 3: Annual credits 85, Annual FTEs 2.85
- Year 4: Annual credits 89, Annual FTEs 2.97
- Year 5: Annual credits 94, Annual FTEs 3.14

If enrollments do not meet expectations, expenses will adjust to reflect actual activity. The program's financial sustainability will be evaluated annually.

- b. If those minimums are not met, what is the sunset clause by which the program will be considered for discontinuance?

Programs operating under the online program fee model at Boise State University are expected to be fiscally sustainable. If enrollments do not meet expectations, expenses will be adjusted to reflect actual activity. The program's financial sustainability will be evaluated at least annually. If it is determined to be fiscally unsustainable in the long term, it will be discontinued.

11. **Assurance of Quality.** Describe how the institution will ensure the quality of the program. Describe the institutional process of program review. Where appropriate, describe applicable specialized accreditation and explain why you do or do not plan to seek accreditation.

**Regional Institutional Accreditation:** Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

**Program Review:** Boise State has instituted a new program review procedure. At the inception of new programs, the programs will submit to the Office of the Provost a three-year assessment plan to be scheduled into the Periodic Review/Assessment Reporting Cycle. The plan includes program learning outcomes; and an implementation plan with a timeline identifying when and what will be assessed, how the programs will gather assessment data, and how the program will use that information to make improvements. Then, every three years, the programs will provide Program Assessment Reports (PAR), which will be reviewed by a small team of faculty and staff using a PAR Rubric, which includes feedback, next steps, and a follow-up report with a summary of actions.

**Program Development Support:**

The online Bachelor of Project Management is one of several that are being created via the eCampus Expansion Initiative at Boise State University.

- **Program Design:** Boise State's online program development process includes a facilitated program design process to assist program faculty members in the creation of an intentional, cohesive course progression aligned to both course and program learning outcomes.
- **Course Design and Development:** Each course is designed and developed by a faculty member. They work with the assistance of a team of experts, which includes an instructional designer, a multimedia developer, a quality assurance specialist, and a course developer. The end result is a program version of each course. All courses for the program are developed with a consistent look and feel using a common course template aligned with nationally recognized Quality Matters course design standards.
- **Course Maintenance:** The academic department is responsible for the continuous course improvement of online program courses.

**Academic Integrity:**

Academic integrity is vital to the mission of Boise State University and encompasses the totality of academic rigor, ethical behavior, intellectual curiosity, appropriate teamwork, and persistence.

All assignments submitted by a student must represent his/her own ideas, concepts, and current understanding or must cite the original source. Boise State proactively supports academic integrity by providing training, maintaining a website dedicated to academic integrity, providing tools such as pedagogical strategies, workshops, and tips for designing tests, as well as establishing policies and procedures for students who violate the academic integrity policy within the Student Code of Conduct. For this new online program, we will use the following strategies to encourage academic integrity:

- During the design and development of the curriculum and assessment of each course, instructors will be informed by staff of Boise State's eCampus Center about best practices for online course design based on Quality Matters™ and best practice strategies to promote academic integrity in online education based on WCET's recommendations (Version 2.0, June 2009)
- Through the program development process, course production, course launch support provided by the eCampus Center, and other means, instructors will be reminded about the importance of academic integrity and encouraged to report and act upon suspected violations.
- Academic integrity will be addressed within online student orientation. Programs may require online students to complete the university's Academic Integrity Online Workshop.
- At the beginning of each course, the instructor will communicate expectations regarding academic integrity to students in the syllabus and verbally and may require completion of the university's Academic Integrity Online Workshop.

**Student Authentication:**

Because the proposed program will be offered entirely online, it is important to include mechanisms by which we authenticate the identity of students enrolled in the program. We will use the following mechanisms:

- During the admissions process, the university will confirm required official transcripts and other documentation required for admission into the program.
- Associated with access to and use of our Learning Management System, a secure log-in environment will be provided and students will be required to use strong passwords and change them every 90 days.
- When high-stakes exams are required, faculty will be encouraged to utilize remote or online proctoring services when appropriate. In those instances, students will need to provide valid photo identification before gaining access to the graded assessments or other required activities.
- Instructors will utilize Canvas's Ouriginal plagiarism detection program when appropriate.
- Instructors are expected to be informed of and aware of the importance of student identity authentication and to report and act upon suspected violations.

12. **In accordance with Board Policy III.G., an external peer review is required for any new doctoral program.** Attach the peer review report as **Appendix A**.

N/A

13. **Teacher Education/Certification Programs** All Educator Preparation programs that lead to certification require review and recommendation from the Professional Standards Commission (PSC) and approval from the State Board of Education.

Will this program lead to certification?



Yes \_\_\_\_\_ No X \_\_\_\_\_

If yes, on what date was the Program Approval for Certification Request submitted to the Professional Standards Commission?

**14. Three-Year Plan: If this is a new proposed program, is it on your institution’s approved 3-year plan?**

Yes X No \_\_\_\_\_

If yes, proceed to question 15. If no:

**a. Which of the following statements address the reason for adding this program outside of the regular three-year planning process.**

Indicate (X) by each applicable statement:

	Program is important for meeting your institution’s regional or statewide program responsibilities.
	The program is in response to a specific industry need or workforce opportunity.
	The program is reliant on external funding (grants, donations) with a deadline for acceptance of funding.
	There is a contractual obligation or partnership opportunity related to this program.
	The program is in response to accreditation requirements or recommendations.
	The program is in response to recent changes to teacher certification/endorsement requirements.

**b. Provide an explanation for all statements you selected.**

**Educational Offerings: Curriculum, Intended Learning Outcomes, and Assessment Plan**

**15. Curriculum. Provide descriptive information of the educational offering.**

**a. Summary of requirements.** Provide a summary of program requirements using the following table.

Credit hours in required courses offered by the department (s) offering the program.	24-30
Credit hours in required courses offered by other departments:	12-18
Credit hours in institutional general education curriculum	37-41
Credit hours in free electives	31-47
Total credit hours required for degree program:	120

**b. Curriculum.** Provide the curriculum for the program, including credits to completion, courses by title and assigned academic credit granted.

Take 1 (3 credits):

- PROJMG 300 - Fundamentals of Project Management

- COID 264 - Project Management I: Start, Plan, Run
- SCM 435 - Project Management
- IPS 440 - Project Management and Design

Take the following:

PROJMGT 301 (3 credits) – Documentation and Process Facilitation

Take 1 (3 credits):

- PROJMGT 350 - Project Management Specialization
- PRO 401 - Project Management
- PUBH 420 - Strategic Planning and Project Management

Take at least 12 credits from the following:

- PROJMGT 493 - Internship

Take the following:

- FF Course (3 credits) - PROJMGT 499 Capstone

Additional Major/Emphasis Requirements

Complete all of the following:

In addition, complete the following coursework to graduate with Bachelor in Project Management (without an emphasis) or complete the courses listed under one of the emphases to graduate with a Bachelor of Project Management with an emphasis in *Business Management, Communications Management, Cyber Security, or Public Health*.

**Without an emphasis:**

- Complete all of the following
  - Take at least 16 credits from the following: Upper division electives
  - Take at least 43 credits from the following: Electives to total 120 credits

**c. Additional requirements.** Describe additional requirements such as comprehensive examination, senior thesis or other capstone experience, practicum, or internship, some of which may carry credit hours included in the list above.

**PROJMGT 493 - Internship** - Internship credits are earned in supervised fieldwork specifically related to a student's major. To enroll in courses numbered 293 or 493, a student must have attained a cumulative grade-point average of 2.00 or higher. No more than 12 credits of internship and/or Work U may be applied towards graduation requirements.

**PROJMGT 499 - Capstone** - Students apply their knowledge and skills in project management, research the project management industry as it aligns with their career goals, develop and present their professional portfolio.

**16. Learning Outcomes: Expected Student Learning Outcomes and Connection to Curriculum.**

- a. **Intended Learning Outcomes.** List the Intended Learning Outcomes for the proposed program, using learner-centered statements that indicate what students will know, understand, and be able to do, and value or appreciate as a result of completing the program.
- Competent with project management theory and process including all aspects to successfully manage projects including especially predictive planning and agile management, resource needs, information analysis, time constraints, and project scoping.
  - Competent in project management emphasizing the soft skills needed to effectively lead a project team in today's changing environment including problem solving, leadership, ethics, and so forth.
  - Competent in connecting project management to the organizational strategy and the management context to support successful implementation.
  - Able to function as a Project Management Professional.

**17. Assessment plans.**

- a. **Assessment Process.** Describe the assessment plan for student learning outcomes that will be used to evaluate student achievement and how the results will be used to improve the program.

This program will use a two-pronged approach for program assessment:

First, we will utilize a post-term design in the program capstone class. We will create a test bank of questions similar to those used in a Project Management Professional certification exam. This information will provide students with a realistic assessment of their preparedness to take the PMP exam and simultaneously provide the program a realistic assessment of how well it is preparing students for that certification process.

Second, we will utilize a portfolio design process where students (i) articulate their knowledge, skills, and abilities for their chosen specialty in project management, (ii) analyze the industry and trends to prepare them to transition into a professional position within project management, and (iii) design their professional portfolio to support this transition into a project management career.

**Resources Required for Implementation – fiscal impact and budget.**

Organizational arrangements required within the institution to accommodate the change including administrative, staff, and faculty hires, facilities, student services, library; etc.

**18. Physical Facilities and Equipment:** Describe the provision for physical facilities and equipment.

- a. **Existing resources.** Describe equipment, space, laboratory instruments, computer(s), or other physical equipment presently available to support the successful implementation of

the program.

No impact is anticipated.

- b. Impact of new program.** What will be the impact on existing programs of increased use of physical resources by the proposed program? How will the increased use be accommodated?

No impact is anticipated.

- c. Needed resources.** List equipment, space, laboratory instruments, etc., that must be obtained to support the proposed program. Enter the costs of those physical resources into the budget sheet.

N/A

- 19. Library and Information Resources:** Describe adequacy and availability of library and information resources.

- a. Existing resources and impact of new program.** Evaluate library resources, including personnel and space. Are they adequate for the operation of the present program? Will there be an impact on existing programs of increased library usage caused by the proposed program? For off-campus programs, clearly indicate how the library resources are to be provided.

Library resources are currently adequate with no anticipated impact on usage. The Albertson's library provides research databases, electronic textbook reserves and also books by mail for distance studies students.

- b. Needed resources.** What new library resources will be required to ensure successful implementation of the program? Enter the costs of those library resources into the budget sheet.

No additional library resources are required.

**20. Faculty/Personnel resources**

- a. Needed resources.** Give an overview of the personnel resources that will be needed to implement the program. How many additional sections of existing courses will be needed? Referring to the list of new courses to be created, what instructional capacity will be needed to offer the necessary number of sections?

**Personnel:** There are no additional resources required for the administration of this program as this program will fall within the scope of duties for the College of Arts and Sciences Director of Online Initiatives. The primary resources for personnel will be to hire instructional staff. These costs are covered by revenue generated from the program from tuition fees.

**Courses:** This program will require the creation of four new courses. The creation of these courses will utilize existing teaching capacity with expertise in project management

in coordination with program and course design consultation in the Division of Extended Studies.

- b. Existing resources.** Describe the existing instructional, support, and administrative resources that can be brought to bear to support the successful implementation of the program.

Years 2, 4, and 5 of the programs will utilize existing faculty instruction from five colleges participating in this program, including especially the College of Arts and Sciences. This equates to:

Yr 2- .10 FTE

Yr 4- .10 FTE

Yr 5- .05 FTE

Years 1 - 5 of the program will utilize existing faculty for program administration and coordination from the College of Arts and Sciences. This equates to .05 FTE per year.

Todd will teach PM 499 the years it is offered and oversee the program.

- c. Impact on existing programs.** What will be the impact on existing programs of increased use of existing personnel resources by the proposed program? How will quality and productivity of existing programs be maintained?

This program was designed collaboratively with five academic colleges plus numerous administrative units. Existing courses in project management were included in the program as options for students to allow for maximal flexibility and opportunities for specialization for students.

In addition, the creation of this program has led to the emergence of new collaborations among colleges within the university and, more importantly, new relationships with industry. Program leadership has worked alongside the Western Idaho Chapter of the Project Management Institute (PMIWIC) including incorporation of their expertise on program design and a new mentoring program for students with PMIWIC members.

- d. Needed resources.** List the new personnel that must be hired to support the proposed program. Enter the costs of those personnel resources into the budget sheet.

As the program grows, adjunct faculty may be hired to teach additional course sections.

## 21. Revenue Sources

- a) Reallocation of funds:** If funding is to come from the reallocation of existing state appropriated funds, please indicate the sources of the reallocation. What impact will the reallocation of funds in support of the program have on other programs?

N/A

- b) New appropriation.** If an above Maintenance of Current Operations (MCO) appropriation is required to fund the program, indicate when the institution plans to include the program in the legislative budget request.

No new appropriation will be required.

**c) Non-ongoing sources:**

- i. If the funding is to come from one-time sources such as a donation, indicate the sources of other funding. What are the institution's plans for sustaining the program when that funding ends?  
N/A
- ii. Describe the federal grant, other grant(s), special fee arrangements, or contract(s) that will be valid to fund the program. What does the institution propose to do with the program upon termination of those funds?  
N/A

**d) Student Fees:**

- i. If the proposed program is intended to levy any institutional local fees, explain how doing so meets the requirements of Board Policy V.R., 3.b.  
N/A

- ii. Provide estimated cost to students and total revenue for self-support programs and for professional fees and other fees anticipated to be requested under Board Policy V.R., if applicable.

The student fee will be in accordance with the Online Program Fee as defined in the Board Policy V.R., 3.a.x. That policy enables the institution to set a price-point appropriate for the program; students will pay an online program fee in lieu of tuition. The price-point for the online program fee will be as follows: \$375 per credit.

*Students enrolled in Program Management, taking project management classes and declaring Project Management as their major:*

We project that by the fourth year of the program, it will generate 383 SCH, which will yield gross revenue of \$170,273 and \$71,824 in revenue for the online program fee model program itself.

*Students enrolled in non-PM classes and declaring Project Management as their major:*

The Bachelor of Project Management program plans to open enrollments for their PM classes to any student within the online program fee model ecosystem. This budget is recognizing the additional revenue of \$45 per credit that this program will receive from students enrolled in online programs who are taking non-PM classes. It is projected that Project Management students will need to take an additional 21 credits of non-PM classes in order to graduate with a Project Management degree. For these populations, we project that by the fourth year of the program, students will generate 383 SCH, which will yield gross revenue of \$143,648 and \$18,004 in revenue for the Project Management degree itself.

22. Using the excel **budget template** provided by the Office of the State Board of Education, provide the following information:

- Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first **four** fiscal years of the program.

- Include reallocation of existing personnel and resources and anticipated or requested new resources.
- Second- and third-year estimates should be in constant dollars.
- Amounts should reconcile subsequent pages where budget explanations are provided.
- If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies).
- Provide an explanation of the fiscal impact of any proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS  
APRIL 25, 2023**

**ATTACHMENT 1**

**I. PLANNED STUDENT ENROLLMENT**

	<u>FY 2024</u>		<u>FY 2025</u>		<u>FY 2026</u>		<u>FY 2027</u>	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments	1.3	6	4.2	14	7.6	26	11.5	37
B. Shifting enrollments	0.1	1	0.5	2	0.8	3	1.3	4
<b>Total Enrollment</b>	<u>1.4</u>	<u>7</u>	<u>4.7</u>	<u>16</u>	<u>8.4</u>	<u>28</u>	<u>12.8</u>	<u>41</u>
<b>Student Credit Hours Generated</b>	<u>43</u>		<u>140</u>		<u>253</u>		<u>383</u>	

**II. REVENUE**

	<u>FY 2024</u>		<u>FY 2025</u>		<u>FY 2026</u>		<u>FY 2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. New Appropriated Funding Request								
2. Institution Funds		\$7,943		\$8,163		\$8,389		\$8,622
3. Federal								
4. New Tuition Revenues from Increased Enrollments								
5. Student Fees		\$16,193		\$52,664		\$94,941		\$143,648
6. Other, Shared Course Revenue		\$2,030		\$6,601		\$11,899		\$18,004
<b>Total Revenue</b>	<u>\$0</u>	<u>\$26,166</u>	<u>\$0</u>	<u>\$67,427</u>	<u>\$0</u>	<u>\$115,229</u>	<u>\$0</u>	<u>\$170,273</u>



**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS  
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**ATTACHMENT 1**

Budget Notes:

- I.A, B. Calculation of FTE and headcount as follows:
  - >1 FTE = 24 credits
  - >Headcount determined as the distinct number of students in the program that year.
  - >Assume that 90% of the enrollments will be new enrollments and 10% will be shifting enrollments.
  - >Assume 25% attrition from 1st to 2nd semester, then 3% attrition every semester. No attrition from 2nd to last semester.
- II.2. The College of Arts and Sciences will support the the program in Yrs 1 through 5 for support personnel expenses already paid by the college. Correspondin expense shown in III.A.6.
- II.5. Student Fee revenue calculated as Student Credit Hours \* \$375 per credit.  
\$375 calculated as estimate of 2022-2023 per credit rate.  
To be conservative, assume in calculations that per-credit fee does not increase over time to align with the amount charged to traditional resident students.
- II.6. The Program Management bachelors will receive revenue from PM students taking classes within the shared course suite. This has been calculated with each degree student taking an additional 21 credits over 4 semesters at \$47/per credit.

**III. EXPENDITURES**

	FY <u>2024</u>		FY <u>2025</u>		FY <u>2026</u>		FY <u>2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>A. Personnel Costs</b>								
1. FTE		0.36		0.59		0.55		0.59
2. Faculty		\$0		\$3,734		\$0		\$3,843
3. Adjunct Faculty		\$9,064		\$13,070		\$14,938		\$13,451
4. Graduate/Undergrad Assistants		\$0.00		\$0.00		\$0.00		\$0.00
5. Research Personnel		\$0.00		\$0.00		\$0.00		\$0.00
6. Directors/Administrators		\$6,114		\$6,298		\$6,487		\$6,681
7. Administrative Support Personnel		\$0		\$0		\$0		\$0
8. Fringe Benefits		\$2,645		\$3,377		\$3,247		\$3,497
9. Other: Teaching Assistants		\$0		\$0		\$0		\$0
<b>Total Personnel and Costs</b>	<b>\$0</b>	<b>\$17,823</b>	<b>\$0</b>	<b>\$26,480</b>	<b>\$0</b>	<b>\$24,671</b>	<b>\$0</b>	<b>\$27,472</b>

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS  
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**ATTACHMENT 1**

Budget Notes (continued)

- III.A.2 Faculty FTE: Calculated using (Credit hour load)/24 for faculty; professor teaching PM 499 in Y2, Y4, and Y5 of this budget paid \$1,317 per credit hour
- III.A.3 Adjunct FTE: Calculated using (Credit hour load)/24; calculated at \$1,317 cost per credit hour; Y1 7.5 credits of instruction, Y2/Y4/Y5 11 credits of instruction, Y3 12 credits of instruction
- III.A.6 Administrator: Program Coordinator (.05 FTE); paid for via existing workload paid for by COAS/EXST arrangement (referenced in section II.2)
- III.A.8 Benefits calculated at staff fringe rate of \$12,500+(annual wage\*19.69%) professional staff and \$12,500+(annual wage\*19.79%) classified staff

	FY 2024		FY 2025		FY 2026		FY 2027	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditures</b>								
1. Travel	_____	_____	_____	_____	_____	_____	_____	_____
2. Marketing and Promotion	_____	_____	_____	_____	_____	_____	_____	_____
3. Other Services	_____	_____	_____	_____	_____	_____	_____	_____
4. Communications	_____	_____	_____	_____	_____	_____	_____	_____
5. Materials and Supplies	_____	_____	_____	_____	_____	_____	_____	_____
6. Rentals	_____	_____	_____	_____	_____	_____	_____	_____
7. Materials & Goods for Manufacture & Resale	_____	_____	_____	_____	_____	_____	_____	_____
8. Miscellaneous - Computer Hardware/Software	_____	_____	_____	_____	_____	_____	_____	_____
<b>Total Operating Expenditures</b>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS**

**APRIL 25, 2023**

**ATTACHMENT 1**

	FY <u>2024</u>		FY <u>2025</u>		FY <u>2026</u>		FY <u>2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>								
1. Library Resources								
2. Equipment								
<b>Total Capital Outlay</b>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<b>D. Capital Facilities Construction or Major Renovation</b>								
<b>E. Other Costs</b>								
1. Boise State University Support		\$8,096		\$26,332		\$47,470		\$71,824
2. Expenses								
Utilities								
Maintenance & Repairs								
3. Student Scholarships		\$0						
<b>Total Other Costs</b>	<u>\$0</u>	<u>\$8,096</u>	<u>\$0</u>	<u>\$26,332</u>	<u>\$0</u>	<u>\$47,470</u>	<u>\$0</u>	<u>\$71,824</u>
<b>TOTAL EXPENDITURES:</b>	<u>\$0</u>	<u>\$25,919</u>	<u>\$0</u>	<u>\$52,812</u>	<u>\$0</u>	<u>\$72,141</u>	<u>\$0</u>	<u>\$99,296</u>
<b>Net Income (Deficit) to College</b>	<u>\$0</u>	<u>\$246</u>	<u>\$0</u>	<u>\$14,615</u>	<u>\$0</u>	<u>\$43,088</u>	<u>\$0</u>	<u>\$70,977</u>

Budget Notes (specify row and add explanation where needed; e.g., "I.A.,B. FTE is calculated using..."):

III.E.1 Boise State University Support is defined as follows:

Boise State Central Services (10.00% of revenue): A fund dedicated to funding support services for online students.

Boise State eCampus Center (8.75% of revenue): Provide funding for initiative management, online course/program development and other support services

Boise State Online Innovation Fund (3.80% of revenue): Seed funding for academic programs, course development stipends to faculty, open education resource grants and eventually innovation grants

Boise State Online Marketing, Recruitment, Enrollment, Advising and Retention Fund (27.45% of revenue): A fund dedicated to marketing the program, recruiting students, enrolling qualified students, advising students and retaining students throughout the life of the program

## Appendix A

**Bachelor of Project Management (BPM) Emphasis Areas**

The Bachelor of Project Management offers four emphasis areas: Cyber Security, Business Management, Public Health, and Communication Management.

<b>Cyber Security Emphasis</b>	
<b>Course</b>	<b>Credit</b>
• Complete all of the following	
○ Take at least 12 credits from: Cyber Operations Undergraduate Certificate	
▪ Take the following:	
• CPS301 – Information Assurance and Critical Thinking	3
• CPS412 – Foundational Essentials for IT Cybersecurity Practitioners	3
▪ Take at least 2 of the following:	
• CPS401 – Defensive Security	3
• CPS402 – Offensive Security	3
• CPS403 – Recovery and Forensics	3
○ Take at least 4 credits from the following: Upper Division Electives	4
○ Take at least 43 credits from the following: Electives to total 120 credits	43
Grand Total Credits	59

<b>Business Management Emphasis</b>	
<b>Course</b>	<b>Credit</b>
• Complete all of the following	
○ Take at least 12 credits from: Plus Business Undergraduate Certificate	
▪ Take the following:	
• BUSBTC301 – Business Foundations	3
• BUSBTC302 – Understanding Business Value	3
▪ Take at least 2 of the following:	
• BUSBTC310 - Creating Value for Customers	3
• BUSBTC320 – Creating Value for Customers	3
• BUSBTC330 – Creating Value Through Investment	3
○ Take at least 4 credits from the following: Upper-division electives	4
○ Take at least 43 credits from the following: Electives to total 120 credits	43
Grand Total Credits	59

Public Health Emphasis	
Course	Credit
• Complete all of the following	
○ Take at least 15 credits from: Public Health Certificate (online)	
▪ Take the following:	
• PUBH303 – Foundations of Public Health	3
• PUBH310 – Evidence-Based Public Health	3
• PUBH382 – Research Methods in Health	3
▪ Take at least 2 of the following:	
• PUBH315 – Health Policy and Ethics	3
• PUBH355 – Human Health and Disease	3
• PUBH365 – Quality Improvement and Performance Management	3
• PUBH418 – Advanced Public Health Analysis	3
• PUBH419 – Public Health Communications	3
• PUBH420 – Strategic Planning and Project Management	3
• PUB460 – Determinants of Health	3
• Collaborating for Change	3
▪ Take the following:	
• PUBH240 – Foundations of Health Education and Promotion	3
• PUBH342 – Health Education and Promotion Methods	3
• PUBH344 – Health Behavior Theory and Practice	3
○ Take at least 1 credit from the following: Upper Division Electives	1
○ Take at least 43 credits from the following: Electives to total 120 credits	43
Grand Total Credits	59

Communication Management Emphasis	
Course	Credit
• Complete all of the following	
○ Take at least 14 credits from: Communication Management Certificate	
▪ Take the following:	
• PRO301 – Technology for Professionals	2
• PRO303 – Public Relations Campaign Strategies	3
• PRO320 – Business and Professional Communication	3
▪ Take at least 2 of the following:	
• PRO310 – Interviewing	2
• PRO312 – Conflict and Collaboration	3
• PRO321 – Applied Research for Professionals	3
• PRO332 – Writing for Professionals	3
• PRO333 – Community Relations	3
○ Take at least 2 credits of the following: Upper-division electives	2
○ Take at least 43 credits from the following: Electives to total 120 credits	43
Grand Total Credits	59

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS**  
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**BOISE STATE UNIVERSITY**

**SUBJECT**

PhD in Public and Population Health Leadership

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section III.G. and Section V.R.

**BACKGROUND/DISCUSSION**

Boise State University proposes to offer a Ph.D. program in Public and Population Health Leadership. The program is designed to focus on the unique public and population health needs of Idaho. It would provide advanced training for those who intend to become senior leaders in public and population health, and healthcare organizations.

The proposed program builds on the success of Boise State's existing undergraduate public health degrees and Master of Public Health program. The Ph.D. curriculum would provide future leaders with the scientific knowledge and leadership skills needed to develop strategies that capitalize on the unique characteristics and resources of Idaho's communities. Graduates would be equipped to lead efforts tailored to improve the health and well-being of citizens within the context of each community's core values and priorities. Graduates would possess transferable skills that would allow them to lead and engage in public and population health research, and practice in settings inside and outside of Idaho.

**IMPACT**

Graduates of the Ph.D. in Public and Population Health Leadership program would be qualified for a variety of leadership positions in public and population health and healthcare settings at the local, state, and federal levels, as well as health-focused non-profit organizations and university settings. St. Luke's Health System, Idaho's largest health care provider, announced a change in their leadership strategy that will include moving their chief nursing officers into key management roles. They indicated a need for these new leaders to have graduate training in public health and organizational leadership.

The Ph.D. program would bring Boise State a new capacity for doctoral level research in public health and population science. It would fill a tremendous need for addressing the health of Idaho's population. In addition to research capacity, the program would produce leaders in public health and health services, most of whom would be recruited from local public health and health service institutions. Graduates of the program would be scientist leaders who would organize and lead teams of MPH and bachelor level public health professionals. Students would gain an understanding of the complex nature of public and population-health problems and ways to address them.

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Program recruitment would involve informing current students and alumni, outreach to local public health and healthcare organizations through human resources departments, pertinent professional development organization and promotions at various local, state, and national public health events such as the annual Idaho Public Health Association and American Public Health Association conferences. The source of funds for the program is the reallocation of existing university funds, thus, no new funds are needed.

Ph.D. students would be charged according to standard Boise State University tuition and fee schedules for graduate students. No new fees would be associated with the program. Students who are Idaho residents attending graduate school part-time or full-time can anticipate paying \$30,204.00 - \$32,927.15 for 67 hours of graduate credit. Non-resident students attending part-time can anticipate paying approximately \$59,727.15 in tuition and fees, while non-resident students attending full-time can anticipate paying up to \$82,215.30. The total financial impact of this request is \$536,761-\$575,247 over a four-year period, which would support three new faculty with capacity to cover 12 new course sections, three graduate assistants, and one staff member.

**ATTACHMENTS**

Attachment 1 – Ph.D. Public and Population Health Leadership proposal

**STAFF COMMENTS AND RECOMMENDATIONS**

Boise State University proposes that the program is designed to admit three-four students in an annual cohort with matriculation beginning each fall. These are based on Boise State University's current teaching and mentoring capacity. With that said, the university estimates a 30% rate of attrition over the three-year program and expects to graduate approximately two-three students per year. Initial projections are to enroll two students in the first year with a goal of reaching 10 by year five. Given that the program anticipates enrolling both full-time and part-time students, the program indicates total enrollment to be approximately 11 (Fall 26), 13 (Fall 27), 14-15 (Fall 28). To maintain program sustainability, the program identified it would need to enroll seven-nine students based on size and capacity of the faculty as a whole. If five total enrollment is not maintained for three consecutive years, the program would reevaluate and consider discontinuance.

Consistent with Board Policy III.G., the proposed Ph.D. in Public and Population Health Leadership was reviewed by an external review panel consisting of Dr. Linda A. Alexander, West Virginia University School of Public Health and Dr. Steven Lacey, University of Utah School of Medicine. Based on their review, reviewers overall found that "Boise State University, the community, the workforce, faculty, students, and practice partners would be served well by the addition of this exceptional program." The reviewers shared several key observations and potential challenges and provided recommendations. Overall, those were not a deterrent to start offering classes to the first cohort in Fall 2023.



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Boise State University's request to offer a Ph.D. in Public and Population Health Leadership is consistent with their Service Region Program responsibilities and their current institution plan for Delivery of Academic Programs in Region III. In accordance with Board Policy III.Z, no institution has the statewide program responsibility specifically for a public health and population science program at the doctoral level. Idaho State University has the statewide program responsibility for Master of Public Health and currently offers the program under a hybrid model. Boise State University also offers a Master of Public Health and currently offers the program face-to-face.

The proposal completed the program review process and was presented to the Council on Academic Affairs and Programs on April 6, 2023; to the Instruction, Research, and Student Affairs on April 13, 2023; and to the Business Affairs and Human Resources on April 12, 2023.

Board staff recommends approval.

**BOARD ACTION**

I move to approve the request by Boise State University to create a new academic program that will award a PhD in Public and Population Health Leadership, as presented in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_



Institutional Tracking No. \_\_\_\_\_

FULL PROPOSAL FORM

Academic Degree and Certificate Program

Date of Proposal Submission:	January 6, 2023		
Institution Submitting Proposal:	Boise State University		
Name of College, School, or Division:	College of Health Sciences; School of Public and Population Health		
Name of Department(s) or Area(s):	School of Public and Population Health		
Official Name of the Program:	Doctor of Philosophy in Public and Population Health Leadership		
Implementation Date:	Fall 2023		
Degree Information:	Degree Level: Graduate	Degree Type: PhD	
CIP code (consult IR /Registrar):	51.2299		
Method of Delivery: Indicate percentage of face-to-face, hybrid, distance delivery, etc.	Hybrid - 90-95% face-to-face, 5-10% online		
Geographical Delivery:	Location(s)	Boise, Idaho	Region(s) Boise, Idaho
Indicate (X) if the program is/has: (Consistent with Board Policy V.R.)	<input type="checkbox"/> Self-Support fee	<input type="checkbox"/> Professional Fee	<input type="checkbox"/> Online Program Fee
Indicate (X) if the program is: (Consistent with Board Policy III.Z.)	<input type="checkbox"/> Regional Program Responsibility	<input type="checkbox"/> Statewide Program Responsibility	

Proposed Action

- New program offering**
  - Undergraduate program
  - Graduate program
  - Undergraduate certificate (30 credits or more)
  - Graduate certificate (30 credits or more)
- New branch campus or change in location**


- Modification of Existing Academic Programs**
  - Converting one program option to a stand-alone program
  - Consolidating two or more undergraduate programs into one
  - Consolidating two or more graduate programs into one
  - Splitting an existing program into two or more programs
  - Program expansion outside an institution's Designated Service Region as defined in Board Policy III.Z.
  - Adding certificate or degrees to existing programs

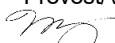
Tim Dunnagan 12/22/2022  
Tim Dunnagan (Dec 22, 2022 14:07 MST)

College Dean Date  
 12/22/2022


Graduate Dean/other (as applicable) Date

Jo Ellen DiNucci 12/22/2022  
Jo Ellen DiNucci (Dec 22, 2022 14:51 MST)


FVP/Chief Fiscal Officer Date  
 12/22/2022  
John Buckwalter (Dec 22, 2022 14:44 MST)

Provost/VP for Instruction Date  
 01/06/2023

President Date

Vice President for Research (as applicable) Date  
 3/20/2023

Academic Affairs Program Manager, OSBE Date

Chief Financial Officer, OSBE Date  
 3/28/2023

Chief Academic Officer, OSBE Date

SBOE/Executive Director or Designee Approval Date

**Before completing this form, refer to Board Policy Section III.G., Postsecondary Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program. All questions must be answered.

### **Rationale for Creation or Modification of the Program**

- 1. Describe the request and give an overview of the changes that will result.** What type of substantive change are you requesting? Will this program be related or tied to other programs on campus? Identify any existing program that this program will replace. If this is an Associate degree, please describe transferability.

**Response:**

Boise State University School of Public and Population Health (SPPH) proposes creating a new Doctor of Philosophy (PhD) in Public and Population Health Leadership degree. This innovative, future-facing program will be completely new and is not intended to replace any preexisting program at Boise State University or in Idaho.

The new Doctor of Philosophy in Public and Population Health Leadership has been designed to focus on the unique public and population health needs of Idaho. The PhD program will provide advanced training for those who intend to become upper-level leaders in public and population health and healthcare organizations. The curriculum provides future leaders with the scientific knowledge and leadership skills needed to develop strategies that capitalize on the unique characteristics and resources of Idaho's communities. Our goal is to foster the development of leaders who understand public and population health science as well as the importance of community engagement, and value the unique culture and resources inherent in the community and the residents. With this foundation, graduates will be equipped to lead efforts tailored to improve the health and well-being of citizens within the context of each community's core values and priorities. Although the program has been designed with the specific needs of Idaho, including Idaho's rural and frontier regions, graduates will possess transferable skills that will allow them to lead and engage in public and population health research and practice in other settings.

The proposed program builds on the success of our existing undergraduate public health degrees and our Master of Public Health (MPH) program. Establishing the proposed PhD in Public and Population Health Leadership will be the final piece necessary to create a pipeline of effective public health and clinical leadership at all levels of service. This health professions pipeline begins with academic partnerships at the community college-level that prepare entry level public health and healthcare workers and continues through a range of academic programs at the university-level that – if this program is approved – will culminate in a cadre of well-prepared public and clinical health leaders and researchers able to serve at all levels of public health and healthcare delivery.

- 2. Need for the Program.** Describe evidence of the student, regional, and statewide needs that will be addressed by this proposal to include student clientele to be served and address the ways in which the proposed program will meet those needs.
  - a. Workforce and economic need:** Provide verification of state workforce needs that will be met by this program. Include job titles and cite the data source. Describe how the proposed program will stimulate the state economy by advancing the field, providing research results, etc.

**Response:**

Graduates from the proposed PhD program will be qualified for a variety of leadership positions in public and population health and healthcare settings at the local, state, and federal levels, as well as in health-focused non-profit organizations and university settings. The projected market demand for doctorally prepared public and population health leaders is high due to demographic changes (retirements) and high rates of attrition in public and population health-related occupations (Krasna, et al, 2020). In addition, new and increasing public health challenges such as the impact of COVID-19<sup>1-3</sup> and climate change<sup>4</sup> have also sparked new demand for highly trained public health leaders. This need has been documented in the scientific literature, and has recently been widely discussed in the news media as the Director of the Centers for Disease Control and Prevention has acknowledged the mishandling of communications with the public<sup>5</sup> regarding the COVID-19 epidemic. The proposed PhD program is intended to create precisely the kind of leadership that these sources are saying are very much in need. In particular, as part of the leadership training, PhD students will be taught the importance of communication and community engagement skills, including the framing and messaging of health issues, with a focus on bridging gaps between the scientific community and the public.

While there are other programs, such as the Master's in Business Administration, that offer leadership training, this program is unique in that it is focused on addressing public health issues and offers a great deal in terms of scientific training in addition to leadership and communication skills. It is therefore more tailored to addressing the public health needs of Idahoans.

In addition, the Idaho Department of Labor projects the Health Care and Social Assistance industry "to grow at 22%, the third fastest among all industries, but will add the most total jobs."<sup>6</sup> This demand is expected, given the needs associated

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<sup>1</sup> Czabanowska K, Kuhlmann E. (2021). Public health competences through the lens of the COVID-19 pandemic: what matters for health workforce preparedness for global health emergencies. (2021). *Int J Health Plann Manage*. May;36(S1):14-19. doi: 10.1002/hpm.3131. Epub 2021 Feb 17. PMID: 33598987; PMCID: PMC8013956.

<sup>2</sup> Krasna, H., Czabanowska, K., Beck, A., Cushman, L. F., & Leider, J. P. (2021). Labour market competition for public health graduates in the United States: A comparison of workforce taxonomies with job postings before and during the COVID-19 pandemic. *The International journal of health planning and management*, 36(S1), 151-167.

<sup>3</sup> Wong BLH, Siepmann I, Chen TT, Fisher S, Weitzel TS, Nathan NL, Saminarsih DS. (2021). Rebuilding to shape a better future: the role of young professionals in the public health workforce. *Hum Resour Health*. Jul 13;19(1):82. doi: 10.1186/s12960-021-00627-7. PMID: 34256785; PMCID: PMC8276547.

<sup>4</sup> Krasna H, Czabanowska K, Jiang S, Khadka S, Morita H, Kornfeld J, Shaman J. (2020). The Future of Careers at the Intersection of Climate Change and Public Health: What Can Job Postings and an Employer Survey Tell Us? *Int J Environ Res Public Health*. 2020 Feb 18;17(4):1310. doi: 10.3390/ijerph17041310. PMID: 32085475; PMCID: PMC7068354.

<sup>5</sup> Walensky, Citing Botched Pandemic Response, Calls for C.D.C. Reorganization. **New York Times**. August 17, 2022. <https://www.nytimes.com/2022/08/17/us/politics/cdc-rochelle-walensky-covid.html?searchResultPosition=1>

<sup>6</sup> Idaho Department of Labor. Labor Market Projections for Idaho Industries and Occupations: 2014 – 2024. <https://lmi.idaho.gov/Portals/0/Pubs/2024-Idaho-Projections.pdf?ver=2016-10-03-145907-130>

with an aging population and changes in health promotion and delivery. While many professions meet these needs, including clinical and non-clinical professionals, the overall growth of the health sector will require leaders and personnel with knowledge and skills necessary to solve complex problems and reach value-based outcomes. The health sector is evolving and our programs need to adjust to prepare our graduates for the future public health and clinical healthcare leadership.

These changes are already underway. For example, St. Luke's Health System, Idaho's largest health provider, recently announced a change in their leadership strategy that will include moving their chief nursing officers into key management roles. They indicated a need for these new leaders to have graduate training in public health and organizational leadership.

Additionally, Economic Modeling Specialists International (EMSI) recently conducted a study of job postings in Idaho, Washington, and Oregon from employers looking for candidates with public health skills in 2016 and 2017. The most common job titles identified in those listings included the following:

- Health Services Directors
- Public Health Analysts
- Health Policy Analysts
- Practice Managers
- Behavioral Health Care Managers
- Community Health Workers
- Health Educators

Many of these positions were already focused on public health and clinical health management and leadership and the need for those skills have only been amplified by the COVID-19 pandemic.

These trends and the demands for public and clinical health leaders with these skills have been confirmed in our discussions with our partners. For example, in this application you will find letters of support for our proposed program by all of Idaho's major hospital systems (i.e. St. Alphonsus, St. Luke's, and the Veteran's Health Administration), the Idaho Department of Health and Welfare (our state- level agency) and the all seven of Idaho's regional public health districts (please see letters of support attached).

In terms of estimating demand, because of the broad range of career paths available to a public or population health graduate, the ability to use federal and/or state Department of Labor data to establish precise numbers is of limited value. The most relevant Occupation classes in the federal Department of Labor database include:

- Medical and health services managers, SOC 11-9111
- Health educators, SOC 21-1091
- Community health workers, SOC 21-10
- Social and Community Service Managers SOC

The category “Medical and health services managers” is, unfortunately, very broad. It includes 23 different job titles, five of which start with at least an undergraduate degree in and others that require additional training. Because there is no information available on the numbers of jobs represented under each job title, we will use a conservative estimate that assumes 20% of the job openings associated with “Medical and health services managers” being relevant to our graduates in the tables below.

Total projected annual job openings			
	State DOL data	Federal DOL data	Other data source: (describe): Study by Educational Advisory Board (see text above)
Local (Service Area)	156	N/A	102
State	309	N/A	210
Nation	N/A	40,780	50,634

2016 National Employment Matrix Title and Code		Employment		Occupational Openings projected 2016-26 Annual Average
Job Title	SOC CODE	2016	2026	
Medical and health services managers (20% of total numbers)	11-9111	70,440 (20% of 352,200)	84,400 (20% of 424,300)	7,280 (20% of 36,700)
Health educators	21-1091	61,000	69,900	8,700
Social and Community Service Managers	11-9151	147,300	173,800	16,300
Community health workers	21-1094	57,500	67,800	8,500
Total				40,780

2016-2026 Idaho Long Term Employment Projections		Base Employment and Projected Employment		Total Annual Openings
Job Title	SOC CODE	2016	2026	
Medical and health services managers (20% of total numbers)	11-9111	388 (20% of 1942)	471 (20% of 2357)	42 (20% of 208)
Social and Community Service Managers	11-9151	937	1112	106
Health educators	21-1091	551	666	85
Community health workers	21-1094	500	601	76
Total				309

According to the Bureau of Labor Statistics, the health care and social assistance sector will become the largest major sector by 2026, increasing from 12.2% in 2016 to 13.8% in 2026, adding nearly 4.0 million jobs nationally.

“Healthcare support occupations (23.6 percent) and healthcare practitioners and technical occupations (15.3 percent) are projected to be among the fastest growing occupational groups during the 2016–26 projections decade. These two occupational groups—which account for 13 of the 30 fastest growing occupations from 2016 to 2026—are projected to contribute about one-fifth of all new jobs by 2026. Factors such as the aging baby-boom population, longer life expectancies, and growing rates of chronic conditions will drive continued demand for healthcare services.”

Additionally, the COVID-19 pandemic has highlighted the tightly coupled relationship between effective public health practice and maintaining a strong economy. Preparing our public and clinical health workforce to be ready to effectively communicate public health action, engage and enlist the support of Idaho communities, make evidence-based policy and practice decisions, use data effectively, and mobilize resources to meet emerging demands seems more essential – to both the public’s health and protecting our economy – than ever before. This is especially so in a globally connected world in which zoonotic diseases are able to spread at a rapid speed. Further, a variety of non-infectious emerging public health issues also threaten our economy. For example, the impact of wildfire smoke on tourism, elder health, and disaster preparedness/response or the impact of increased rates of poor mental health and attempted/completed suicide in the state.

- b. Student demand.** What is the most likely source of students who will be expected to enroll (full-time, part-time, outreach, etc.). Provide evidence of student demand/ interest from inside and outside of the institution.

**Response:**

This program is designed to admit 3 to 4 students in an annual cohort with matriculation beginning each fall. These projections are based on our current teaching and mentoring capacity. Given an estimated 30% rate of attrition over the three-year program, we expect to graduate approximately 2 to 3 students per year. However, as the capacity of the School of Public Health and Population Science grows, we expect to enroll larger cohorts and to graduate more students in the future.

Students will be able to complete the program as either part-time or full-time PhD students. The program has been conceived with full-time working professionals in mind and we expect to have both part-time and full-time students in the program.

In terms of demand for the program, since the implementation of the Master of Public Health program in the fall of 2019, we regularly receive formal and informal inquiries about the availability of PhD programming. For instance, in just the past year, we have received at least 15 inquiries related to possible PhD program from our recently graduated MPH students. These inquiries are coming from MPH graduates who are now working in local public and clinical health organizations and would make an ideal pool of future program participants, as they are committed to prepare to pursue advanced leadership roles in Idaho-based organizations.

Additionally, we routinely receive inquiries from a range of professionals and leaders within public and clinical health organizations. Again, the letters of support provided by all of the key public health and healthcare organizations in Idaho are strong evidence for the need for this type of program. It might also be important to note, that all of these organizations have policies that support their employees advancing their professional training in programs like the one we are proposing and most of them will pay for their employee's tuition.

Based on these high levels of student and organizational interest – combined with being the only program of our type in the state – we are confident in our ability to sustain our projected enrollments and projected number of graduates in the program.

- c. **Societal Need:** Describe additional societal benefits and cultural benefits of the program.

**Response:**

This program will bring to Boise State University a new capacity for doctoral level research in public health and population science. There is currently no such program in the state of Idaho. This program, therefore, will fill a tremendous need for addressing the health of the state's population. In addition to research capacity, this program will produce leaders in public health and health services, most of whom will be recruited from the local public health and health service institutions. A central goal of the program is to admit students who are currently public health professionals working in Idaho's public health and health service sector. This will give these working professionals, who are already familiar with many of Idaho's public health issues, additional training in public health research and leadership necessary to help address these challenges. New challenges to the health of Idaho's population include the effects of extreme heat conditions that have affected many of the state's elderly population, wildfire smoke which has repeatedly polluted the summer air for much of the state, flooding, which is expected to affect parts of the state, and the emergency preparedness that must be in place to handle these and other situations, some of which are not yet foreseeable. In addition,



the Centers for Disease Control and Prevention publicly acknowledged major failures in the response to the COVID-19 pandemic, including a poor handling of communication of relevant information to the public. All these public health concerns and failures demonstrate the tremendous need for new leadership to manage these crises, communicate public health information more effectively, and minimize their impact on the population of Idaho more effectively.

While the MPH program produces professionals capable of providing technical assistance and serving as mid-level managers, this program is designed to create professionals who will be occupying the highest levels of their organizations.

Graduates of the PhD program will be scientist leaders who will organize and lead teams of MPH and BA level public health professionals. They will receive the training in scientific theories and research methods of public health which will enable them to work with those at other levels to identify public health problems, select and coordinate resources necessary to research the problem, oversee the research leading to evidence-based solutions, and lead their organizations as they identify solutions and communicate their findings to a variety of stakeholders. The needs expressed the CDC's recent acknowledgement of their failures in messaging their Covid-19 response illustrates the need for these positions and this program. It is this capacity to oversee the research and communications that this program is intended to provide.

Regardless of their career paths, graduates with public health training benefit society in many ways. Students gain understanding of the complex nature of public and population-level health problems and ways to address them. Two issues that illustrate the diversity of challenges that must be addressed are obesity and issues related to aging populations.

- As Idaho communities struggle to deal with the obesity epidemic, public health graduates understand that a "one size fits all" approach will not address obesity across the state. PhD level public health graduates will be prepared to see communities as systems and that addressing these issues requires cross-sector collaboration.
- As Idahoans retire and want to live healthy, functional lives in their homes, graduates trained in public health can contribute to assessing the resources and assets of the area to identify gaps in services and help navigate the intricacies of healthcare. Community health leaders, health educators, and others guiding community level assistance will be instrumental to cost-effective solutions to keep our seniors in their communities and homes as long as possible.

Further, like most states, the majority of public health professionals in Idaho do not have a public health-specific academic degree. This program ensures that public health practitioners and leaders within the state are able to prepare themselves for effective service and leadership at all levels of responsibility.

Finally, this innovative program creates not-only an in-state option for developing senior-level public health and clinical leadership, but it will also create a cadre of academic public health researchers that understand public health in Idaho and who will be prepared to conduct applied research focused on solving practical problems in Idaho and beyond.

**3. Program Prioritization**

Is the proposed new program a result of program prioritization?

Yes \_\_\_\_\_ No X \_\_\_\_\_

If yes, how does the proposed program fit within the recommended actions of the most recent program prioritization findings.

**4. Credit for Prior Learning**

Indicate from the various cross walks where credit for prior learning will be available. If no PLA has been identified for this program, enter 'Not Applicable'.

**Response:**

For students who have previous completed doctoral level courses, we will evaluate any doctoral course in which they earned the grade of "B" or higher to determine if they are appropriate for inclusion in the program.

**5. Affordability Opportunities**

Describe any program-specific steps taken to maximize affordability, such as: textbook options (e.g., Open Educational Resources), online delivery methods, reduced fees, compressed course scheduling, etc. This question applies to certificates, undergraduate, graduate programs alike.

**Response:**

The School of Public and Population health has been provided three Graduate Assistantships for the program. Faculty grants will present opportunities to fund some PhD students. PhD students will be informed of campus wide assistantship opportunities outside of the School. In addition, some students will be working full time and some employers might fund their PhD training.

Finally, we will use Open Educational Resources whenever possible and many of our courses will not require textbooks, but instead delivery content through scientific articles and other freely available materials.

**Enrollments and Graduates**

**6. Existing similar programs at Idaho Public Institutions.** Using the chart below, provide enrollments and numbers of graduates for similar existing programs at your institution and other Idaho public institutions for the most past four years.

**Response:**

Currently there are no similar doctoral programs in public or population health in the state of Idaho.

Institution	Program Name	Fall Headcount Enrollment in Program				Number of Graduates from Program (Summer, Fall, Spring)			
		FY 19	FY20	FY21	FY22 (most recent)	FY 19	FY20	FY21	FY22 (most recent)
n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

7. **Justification for Duplication** (if applicable). If the proposed program is similar to another program offered by an Idaho public higher education institution, provide a rationale as to why any resulting duplication is a net benefit to the state and its citizens. Describe why it is not feasible for existing programs at other institutions to fulfill the need for the proposed program.

**Response:**

Not applicable.

8. **Projections for proposed program:** Using the chart below, provide projected enrollments and number of graduates for the proposed program:

<b>Proposed Program: Projected Enrollments and Graduates First Five Years</b>											
<b>Program Name: PhD in Public and Population Health Leadership</b>											
<b>Projected Fall Term Headcount Enrollment in Program</b>						<b>Projected Annual Number of Graduates from Program</b>					
Fall 2023 (first year)	Fall 2024	Fall 2025	Fall 2026	Fall 2027		FY 24 (first year)	FY 25	FY 26	FY 27	FY28	
2	5	8	9	10		0	0	1	2	3	

Enrollment numbers are based on full-time students. Projected fall term headcount enrollment in program numbers reflect total enrollees with about 3 – 4 per annual cohort. These projections reflect the new students plus previously enrolled students minus attrition and graduation.

Historically, there has been great fluctuation in the annual counts of part-time vs. full-time enrollment in the MPH program. Therefore, determining enrollment of part-time vs. full-time students is difficult. It is likely that the headcount numbers underestimate the actual number of students enrolled as some will likely be part-time students. The total enrollment for FY26-FY28 may be approximately 11 (Fall 26), 13 (Fall 27), and 14-15 for Fall 28 and later.

9. **Describe the methodology for determining enrollment and graduation projections.** Refer to information provided in Question #2 "Need for the Program" above. What is the capacity for the program? Describe your recruitment efforts? How did you determine the projected numbers above?

**Response:**

These numbers reflect the interest from past MPH graduates, current students, and professionals currently working in a variety of public health and healthcare organizations in the greater Boise area. Recruitment will involve informing current students and alumni, outreach to local public health and healthcare organizations through their human resources departments, pertinent professional development organizations, and promotions at various local, state, and national public health events such as the annual Idaho Public Health Association and American Public Health Association conferences.

In addition, we will build upon our current marketing and recruitment efforts which include a web landing page, request for information form, and a full program website with details including program descriptions, curriculum plan, and costs.

Further, we have developed a concierge system for recruiting and supporting applicants' application, acceptance, and matriculation into our master's program that includes strategic, personalized communications designed to maximize student enrollment. We plan to extend this approach into our doctoral programming, thereby using a proven system for maximizing graduate enrollment at our institution. Using this approach, our master's program has been fully enrolled or over-enrolled for all four years it has been implemented.

**10. Minimum Enrollments and Graduates.**

- a. What are the minimums that the program will need to meet in order to be continued, and what is the logical basis for those minimums?

**Response:**

PhD student enrollment is guided by the size and capacity of the faculty as a whole. We intend to admit a cohort of 3 new PhD students each year. By the third year, we anticipate having 7-9 active PhD students. Upon entry to the program, all new students will be advised by the PhD program director. By the end first year, all full-time students will have chosen a PhD advisor who will chair their dissertation committee. All part-time students will choose their dissertation chair by the end of the second year. Therefore, by the start of the third year, six students will be under the guidance of faculty members. With 23 total faculty members, 14 of which are tenured/tenure-track, the faculty is expected to support between 7-9 doctoral students. Resources have been allotted to manage this level of capacity. If students are unable to identify advisors in accordance with the schedule above, the PhD Program Director will serve as their advisor to assure the students continue to progress through the program. To minimize this issue, each applicant's interests will be expected to align with the expertise of at least one faculty member before being admitted to the program. This will assure faculty capacity and expertise are available to serve as advisors and lead the students through the program.

- b. If those minimums are not met, what is the sunset clause by which the program will be considered for discontinuance?

**Response:**

We are anticipating that there will more demand for the program than capacity. However, in the unlikely event that enrollment does not maintain a total of enrollment of 5 students for 3 consecutive years, we will initiate a process in which we consider discontinuance.

**11. Assurance of Quality.** Describe how the institution will ensure the quality of the program. Describe the institutional process of program review. Where appropriate, describe applicable specialized accreditation and explain why you do or do not plan to seek accreditation.

**Response:**

The following measures will ensure the high quality of the new program:

Regional Institutional Accreditation: Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

Program Review: Boise State has instituted a new program review procedure. At the inception of new programs, the programs will submit to the Office of the Provost a three-year

assessment plan to be scheduled into the Periodic Review/Assessment Reporting Cycle. The plan includes program learning outcomes; and an implementation plan with a timeline identifying when and what will be assessed, how the programs will gather assessment data, and how the program will use that information to make improvements. Then, every three years, the programs will provide Program Assessment Reports (PAR), which will be reviewed by a small team of faculty and staff using a PAR Rubric, which includes feedback, next steps, and a follow-up report with a summary of actions.

Specialized Accreditation: The program will seek accreditation by the Council on Education for Public Health (CEPH). CEPH has standards for accreditation of PhD programs. The proposed program is being designed to follow these standards and Boise State University will begin the accreditation process in Fall 2025.

12. **In accordance with Board Policy III.G., an external peer review is required for any new doctoral program.** Attach the peer review report as an Appendix.

**Response:**

This program has been reviewed by two external reviewers approved by the Board. Their report can be found as **Appendix D** to this proposal. Our response to the report can be found as **Appendix E** to this proposal.

13. **Teacher Education/Certification Programs** All Educator Preparation programs that lead to certification require review and recommendation from the Professional Standards Commission (PSC) and approval from the State Board of Education.

Will this program lead to certification?

Yes \_\_\_\_\_ No  X

**Response:**

Not applicable. This proposal is not for an education program.

If yes, on what date was the Program Approval for Certification Request submitted to the Professional Standards Commission?

**Response:**

Not applicable.

14. **Three-Year Plan: If this is a new proposed program, is it on your institution's approved 3-year plan?**

Yes  X  No \_\_\_\_\_

**Response:**

Yes. The proposed program is part of Boise State’s SBOE-approved 3-year plan.

<b>Goals of Institution Strategic Plan</b>	<b>Proposed Program Plans to Achieve the Goal</b>
Goal 1: Improve Educational Access and Student Success	The proposed PhD program provides Boise State University with the opportunity to be a leader in public health professional preparation. The proposed PhD program has been designed to enable students with work, life, or other adult responsibilities to complete their degree requirements with minimal interruption of life situation and obtain a marketable health-related degree. This unique set of program options represent cutting-edge, future-facing curriculum options that will benefit its students and build the institution’s reputation as a curriculum leader.
Goal 3: Advance Research and Creative Activity	This new PhD program will directly support the goal of advancing research and creative activity. The proposed program has already received funding commitments from the university and will come with 3 new, research-intensive faculty hires. Each of these hires will be expected to sustain grant funding and publish in peer-reviewed journals. Additionally, PhD students participating in the program will produce dissertations which will be publishable studies. PhD students may also work on funded faculty research programs, thus increasing the overall number of publications and grant funding obtained by faculty and PhD students alike.
Goal 5: Trailblaze Programs and Partnerships	<p>This program represents an innovative, trailblazing approach to doctoral programming in public health. It recognizes the need to breakdown false divisions between public health scientists and leaders by developing high-level leaders with (a) a strong science background, (b) the ability to mobilize organizations for effective public health action, and (c) the capacity to effectively communicate science, evidence, and public health action to the public-at-large.</p> <p>We expect this program to be a national model for public health preparation, especially for states whose citizens are cautious about public health action and likely to benefit from being served by public health leaders with a deep understanding of their concerns and an ability to communicate effectively.</p> <p>Finally, the program will also create new opportunities for cross- disciplinary research and practice. For example, this program is supported by Boise State University colleges, schools, and departments devoted to business, public service, education, and the liberal arts/sciences and we expect to develop and complete new projects with each of these partners. We also expect that this program will enhance our existing partnerships with Idaho state and district public health agencies and all of the state’s major hospital and health care systems.</p>

If yes, proceed to question 15. If no:

- a. Which of the following statements address the reason for adding this program outside of the regular three-year planning process.

Indicate (X) by each applicable statement:

	Program is important for meeting your institution's regional or statewide program responsibilities.
	The program is in response to a specific industry need or workforce opportunity.
	The program is reliant on external funding (grants, donations) with a deadline for acceptance of funding.
	There is a contractual obligation or partnership opportunity related to this program.
	The program is in response to accreditation requirements or recommendations.
	The program is in response to recent changes to teacher certification/endorsement requirements.

- b. Provide an explanation for all statements you selected.

**Educational Offerings: Curriculum, Intended Learning Outcomes, and Assessment Plan**

15. Curriculum. Provide descriptive information of the educational offering.

- a. Summary of requirements. Provide a summary of program requirements using the following table.

Credit hours in required courses offered by the department (s) offering the program.	58
Credit hours in required courses offered by other departments:	0
Credit hours in institutional general education curriculum	N/A
Credit hours in free electives	9
Total credit hours required for degree program:	67

- b. **Curriculum.** Provide the curriculum for the program, including credits to completion, courses by title and assigned academic credit granted.

Proposed PhD in Public and Population Health Leadership Curriculum			
Fall	Credits	Spring	Credits
<b>Year 1</b>			
MPH 504: Applied Epidemiology (1 <sup>st</sup> 7 weeks)	2	MPH 540: Epidemiology and Statistics II	3
MPH 506: Applied Statistics in Public Health (2 <sup>nd</sup> 7 weeks)	2		
PPHL 610: Research Methods I	3	PPHL 611: Research Methods II	3
PPHL 630: Determinants of Health I: Theoretical Background	3	PPHL 631: Determinants of Health II: Application	3
PPHL 620: Advanced Systems Analysis and Problem-Solving	3	PPHL 621: Organizational Leadership in Public Health	3
<b>Year 2</b>			
MPH 542: Epidemiology and Statistics III <b>or</b> PPHL 612: Advanced Qualitative Research Methods	3	PPHL 635: Health Policy Analysis	3
PPHL 640: Evaluating Program, Policy, and Organizational Performance	3	Cognate Course	3
Cognate Course	3	Cognate Course	3
PPHL 670: Scientific Writing and Proposal Development	3	PPHL 689: Dissertation Proposal/Defense	2
PPHL 691: Comprehensive Examination	1		
<b>Year 3</b>			
PPHL 693: Dissertation Research	9	PPHL 693: Dissertation Research	9
<b>Total Credit Hours</b>			<b>67</b>

A curriculum overview is provided in **Appendix A**, and a part-time curriculum plan of study is provided in the same appendix of this proposal.

- c. **Additional requirements.** Describe additional requirements such as comprehensive examination, senior thesis or other capstone experience, practicum, or internship, some of which may carry credit hours included in the list above.

**Response:**

1. Complete an approved program of study.
2. Complete a doctoral comprehensive examination.
3. Pass an oral dissertation proposal defense.
4. Prepare a dissertation that embodies original scholarly work.
5. Submit at least one manuscript from the dissertation work for publication before scheduling a dissertation oral defense. The manuscript must be of sufficient quality that it was sent out for external peer review by the journal to which it was submitted.
6. Pass a final oral examination pertaining to the dissertation work.
7. Earn a final PhD program GPA of 3.0 or higher.



8. Earn a minimum letter grade of “B” in all coursework. Students who receive less than a “B” in any course will be required to retake that course or an approved equivalent.

**16. Learning Outcomes: Expected Student Learning Outcomes and Connection to Curriculum.**

- a. **Intended Learning Outcomes.** List the Intended Learning Outcomes for the proposed program, using learner-centered statements that indicate what students will know, understand, and be able to do, and value or appreciate as a result of completing the program.

**Response: Part 1:**

**Foundational Competencies/Intended Learning Outcomes:** Our accreditor (CEPH) provides a list of guidelines for knowledge and skill-based competencies/intended learning outcomes for the foundational/core courses in all public health PhD programs. Per their requirements, the CEPH competencies will be used for this program. These foundational competencies/intended learning outcomes include:

Foundational Knowledge: Student Learning Outcomes (CEPH, 2021)

*Profession & Science of Public Health*

1. Explain public health history, philosophy, and values
2. Identify the core functions of public health and the 10 Essential Services
3. Explain the role of quantitative and qualitative methods and sciences in describing and assessing a population’s health
4. List major causes and trends of morbidity and mortality in the U.S. or other community relevant to the school or program
5. Discuss the science of primary, secondary, and tertiary prevention in population health, including health promotion, screening, etc.
6. Explain the critical importance of evidence in advancing public health knowledge

*Factors Related to Human Health*

7. Explain effects of environmental factors on a population’s health
8. Explain biological and genetic factors that affect a population’s health
9. Explain behavioral and psychological factors that affect a population’s health
10. Explain the social, political, and economic determinants of health and how they contribute to population health and health inequities
11. Explain how globalization affects global burdens of disease
12. Explain an ecological perspective on the connections among human health, animal health and ecosystem health (e.g., One Health)

**Response: Part 2:**

**Concentration Competencies/Intended Learning Outcomes:** Additionally, the CEPH accreditation standards require each program to develop a list of competencies/intended learning outcomes specific to the degree being granted. For our proposed program, these degree-specific competencies/intended learning outcomes include:

1. Review and synthesize pertinent literature and formulate focused research questions that address identified knowledge gaps.
2. Conduct an analysis that identifies the root-cause determinants of health

- associated with a public health problem in a specific community that includes recommendations for effective community engagement, communications, policy, and practice within that community.
3. Design and implement a quantitative, qualitative, or mixed methods research study that investigates a public health problem and uniquely contributes to the public health scientific knowledge.
  4. Develop and implement a data analysis plans that (a) describe a public health problem, (b) identify key risk and protective factors associated with the problem, (c) assess changes over time, and (d) evaluate the effectiveness of attempts to intervene.
  5. Communicate research findings and recommendations for action to the scientific community and the community-at-large through peer-reviewed publications and presentations, and other public health community audiences.
  6. Design a multi-level intervention using a multidisciplinary, data-informed, systems-approach to address a public health problem.
  7. Evaluate an organization's readiness to address a public health problem, including recommendations for enhancing operational readiness and sustaining organizational readiness over time.
  8. Evaluate an organization's performance while attempting to address a public health problem, including providing an evaluation report/presentation that describes their performance and recommendations for future action.
  9. Lead public health organizations and research teams as they identify public health problems and conduct and implement research-based solutions

Curriculum maps that connect these competencies/intended learning outcomes to our proposed program courses can be found in **Appendix B**.

#### 17. Assessment plans.

- a. **Assessment Process.** Describe the assessment plan for student learning outcomes that will be used to evaluate student achievement and how the results will be used to improve the program.

**Response:**

Each academic year, the graduate assessment committee and doctoral faculty will review data associated with the doctoral program at the end of the spring semester and prior to the beginning of the following fall semester. During the spring, the committee will review student key assessments, comprehensive exams, dissertation proposals, and completed dissertations. Prior to the beginning of each academic year, the committee will review student data related to student exit surveys, program graduate surveys, and program stakeholder surveys. The PhD Director and program faculty will use information from all of these sources to adjust program objectives, requirements, and instructional methods.

Information gleaned from both qualitative and quantitative assessments will be presented to graduate assessment committee and program faculty as described above. Changes will be made to course and program curriculum as warranted. All program changes will be documented by the PhD Director and submitted for review as part of our university accreditation and discipline accreditation processes. In addition, results will be shared with the Divisional Dean including action items to be addressed during the subsequent year.

Below are listed some general examples of assessment measures anticipated throughout the program:

- Key assessment measures will be used to assess attainment of program-level student learning outcomes as assigned to specific courses. Key assessment measures will include course projects designed to authentically represent actual professional work products.
- Comprehensive examinations, dissertation proposals, and completed dissertations will be reviewed.
- Student course evaluations.
- The graduate exit survey conducted at the end of students' final semester.
- Stakeholder and graduate/alumni survey to be conducted annually in accordance with CEPH accreditation standards.
- Key assessment, comprehensive examinations, dissertation proposals, and completed dissertations reviews will occur annually at the end of the spring semester.
- Student course evaluations, graduate exit survey, and graduate/stakeholder survey data will be reviewed annually prior to the beginning of the fall semester.

A key assessment guide is provided in **Appendix B** of this proposal.

**Resources Required for Implementation – fiscal impact and budget.**

Organizational arrangements required within the institution to accommodate the change including administrative, staff, and faculty hires, facilities, student services, library; etc.

- 18. Physical Facilities and Equipment:** Describe the provision for physical facilities and equipment.
- a. Existing resources.** Describe equipment, space, laboratory instruments, computer(s), or other physical equipment presently available to support the successful implementation of the program.

**Response:**

The space and equipment currently available/assigned to the School of Public Health and Population Science program are sufficient and acceptable to add a successful PhD program.

- b. Impact of new program.** What will be the impact on existing programs of increased use of physical resources by the proposed program? How will the increased use be accommodated?

**Response:**

There will be no negative impact on the undergraduate and MPH programs. Additional space (over 4,000 square feet), furniture, and technology for the proposed doctoral program has already been assigned to the School by our college and the university. The advanced commitment of these resources prevents any adverse impact on existing programs.

- c. Needed resources.** List equipment, space, laboratory instruments, etc., that must be obtained to support the proposed program. Enter the costs of those physical resources into the budget sheet.

**Response:**

No new resources will need to be obtained. As noted above, in anticipation of this program, we have received additional office space, furniture, and technology for new faculty and doctoral program graduate assistants.

**19. Library and Information Resources:** Describe adequacy and availability of library and information resources.

- a. Existing resources and impact of new program.** Evaluate library resources, including personnel and space. Are they adequate for the operation of the present program? Will there be an impact on existing programs of increased library usage caused by the proposed program? For off-campus programs, clearly indicate how the library resources are to be provided.

**Response:**

The library already provides resources to our undergraduate and master's level public and clinical health programs. The same materials and services (journal articles, interlibrary loan, etc.) currently used by faculty and students will also be used by new doctoral students. The current library resources are sufficient for accommodating the increased use by the PhD program. No new library resources will be requested.

- b. Needed resources.** What new library resources will be required to ensure successful implementation of the program? Enter the costs of those library resources into the budget sheet.

**Response:**

No new library resources will be required.

**20. Faculty/Personnel resources**

- a. Needed resources.** Give an overview of the personnel resources that will be needed to implement the program. How many additional sections of existing courses will be needed? Referring to the list of new courses to be created, what instructional capacity will be needed to offer the necessary number of sections?

**Response:**

No new resources are needed. Last May, our college and the university committed new funding to cover 100% of this program. That new funding included 3 new faculty with capacity to cover 12 new course sections, 3 graduate assistants, and 1 staff member. We are combining these resources with the previously existing funding dedicated to developing the program, which includes 0.2 FTE for a PhD Director and 0.3 FTE of an Academic Programs Coordinator. Together, the funds currently committed to this endeavor will be sufficient to operate the PhD program and to support enhanced research activity among our new faculty. This commitment represents permanent funding for the PhD program as long as we meet/exceed our performance metrics.

- b. Existing resources.** Describe the existing instructional, support, and administrative resources that can be brought to bear to support the successful implementation of the program.

**Response:**

The proposed PhD program has been fully funded and includes the following resources. Once the Graduate College and State Board of Education expectations have been met, we will receive the resources that have been set in place.

- 0.2 FTE for program director.
- 3.0 FTE for graduate faculty.
- 1.3 FTE for administrative staff.

These resources will allow us to deliver courses as described in the recommended plans of study provided in section 15b above (full-time plan of study) and in **Appendix D** (part-time plan of study) of this proposal.

- c. Impact on existing programs.** What will be the impact on existing programs of increased use of existing personnel resources by the proposed program? How will quality and productivity of existing programs be maintained?

**Response:**

The proposed PhD program will enhance our existing programs. Additional expertise will be gained in the form of three new faculty members. This will expand the breadth of the school knowledge and capability. This will increase the capacity to serve students at all academic levels who will contribute to promoting the health and wellbeing of all Idahoans. We currently have programs that produce graduates prepared for entry and mid-level public health positions. This program will prepare additional graduates for the highest-level public and clinical health leadership.

- d. Needed resources.** List the new personnel that must be hired to support the proposed program. Enter the costs of those personnel resources into the budget sheet.

**Response:**

As described above, no new personnel will be needed as the university and college have allotted the school to fund this program.

**21. Revenue Sources**

- a) **Reallocation of funds:** If funding is to come from the reallocation of existing state appropriated funds, please indicate the sources of the reallocation. What impact will the reallocation of funds in support of the program have on other programs?

**Response:**

The source of funding for this program will be a reallocation of existing institutional resources.

- b) **New appropriation.** If an above Maintenance of Current Operations (MCO) appropriation is required to fund the program, indicate when the institution plans to include the program in the legislative budget request.

**Response:**

No new appropriation will be required. Permanent funding was granted in Spring of 2022.

c) **Non-ongoing sources:**

- i. If the funding is to come from one-time sources such as a donation, indicate the sources of other funding. What are the institution's plans for sustaining the program when that funding ends?

**Response:**

Not applicable.

- ii. Describe the federal grant, other grant(s), special fee arrangements, or contract(s) that will be valid to fund the program. What does the institution propose to do with the program upon termination of those funds?

**Response:**

Not applicable.

d) **Student Fees:**

- i. If the proposed program is intended to levy any institutional local fees, explain how doing so meets the requirements of Board Policy V.R., 3.b.

**Response:**

Not applicable.

- ii. Provide estimated cost to students and total revenue for self-support programs and for professional fees and other fees anticipated to be requested under Board Policy V.R., if applicable.

**Response:**

Our students will be charged according to standard Boise State University tuition and fee schedules for graduate students. No new fees will be associated with the program. Students who are Idaho residents attending graduate school part-time or full-time can anticipate paying between \$30,204.00 - 32,927.15 for 67 hours of graduate credit. Non-resident students attending part-time can anticipate paying approximately \$59,727.15 in tuition and fees, while non-resident students attending full-time can anticipate paying up to \$82,215.30.

The BSU graduate tuition schedule can be found here: <https://www.boisestate.edu/vpfa-student-financial-services/boise-state-university-fees/graduate-tuition-fees/>

The proposed program will not be a self-support program. The university has allotted three graduate assistantships to this program. As the PhD program was not in place at the time these assistantships were created, the assistantships are currently being offered to students in the MPH program. Upon approval of the PhD program, these will be allotted to the PhD program as originally intended. Students who are awarded assistantships will not have to pay tuition.

22. Using the excel **budget template** provided by the Office of the State Board of Education, provide the following information:

- Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first **four** fiscal years of the program.
- Include reallocation of existing personnel and resources and anticipated or requested new resources.
- Second- and third-year estimates should be in constant dollars.
- Amounts should reconcile subsequent pages where budget explanations are provided.
- If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies).
- Provide an explanation of the fiscal impact of any proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Response:**

Please see the budget for the first four fiscal years of the program on the subsequent pages.

Funding for the proposed program has been agreed upon and dedicated to the program in advance as part of the university/college's strategic planning process. As such, all resources described in the program budget have already been obtained by the university/college and assigned to this program. No further resources will be required.

The addition of PhD programs actually generates opportunities for higher levels of revenue through increased research funding, as doctoral programs and doctoral students make our faculty and school attractive to funding agencies. As such, increasing research funding and research productivity (i.e. peer-reviewed publications, etc.) also represent important opportunities associated with the addition of the proposed program.

As described above, the bulk of the program budget consists of personnel costs that include:

- 0.2 FTE for program director.
- 3.0 FTE for graduate faculty.
- 1.3 FTE for administrative staff.

Other key program costs include funds dedicated providing:

- Three doctoral graduate assistants. These assistantships will help defray the cost of graduate school for eligible students and provide the school with additional capacity related to research and teaching.
- Student research assistance funds. These funds will consist of mini-grants that students can use to establish their dissertation research if they choose to pursue an independent line of inquiry.
- Student travel assistance funds. These funds will be used to help doctoral students travel to scientific conferences to present their peer-reviewed research.

There will be no net reallocations of personnel or other resources associated with this proposal. The proposed program is not contract related and does not include any discontinuance-related impacts.



**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS  
APRIL 25, 2023**

**I. PLANNED STUDENT ENROLLMENT**

	FY <u>2024</u>		FY <u>2025</u>		FY <u>2026</u>		FY <u>2027</u>	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments		2		5		8		9
B. Shifting enrollments								
<b>Total Enrollment</b>		2		5		8		9

**II. REVENUE**

	FY <u>2024</u>		FY <u>2025</u>		FY <u>2026</u>		FY <u>2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. New Appropriated Funding Request	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Institution Funds	\$536,761	\$0	\$549,212	\$0	\$562,037	\$0	\$575,247	\$0
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. New Tuition Revenues from Increased Enrollments	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Other (i.e., Gifts)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Revenue</b>	\$536,761	\$0	\$549,212	\$0	\$562,037	\$0	\$575,247	\$0

*Ongoing is defined as ongoing operating budget for the program which will become part of the base.*

*One-time is defined as one-time funding in a fiscal year and not part of the base.*

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS  
APRIL 25, 2023**

**ATTACHMENT 1**

**III. EXPENDITURES**

	FY <u>2024</u>		FY <u>2025</u>		FY <u>2026</u>		FY <u>2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>A. Personnel Costs</b>								
1. FTE	4.0		4.0		4.0		4.0	
2. Faculty	\$225,000		\$231,750		\$238,703		\$245,864	
3. Adjunct Faculty								
4. Graduate/Undergrad Assistants	\$58,625		\$58,625		\$58,625		\$58,625	
5. Research Personnel								
6. Directors/Administrators								
7. Administrative Support Personnel	\$80,000		\$82,400		\$84,872		\$87,418	
8. Fringe Benefits	\$153,136		\$156,437		\$159,838		\$163,341	
9. Other:								
<b>Total Personnel and Costs</b>	<u>\$516,761</u>	<u>\$0</u>	<u>\$529,212</u>	<u>\$0</u>	<u>\$542,037</u>	<u>\$0</u>	<u>\$555,247</u>	<u>\$0</u>

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS  
APRIL 25, 2023**

	<u>FY 2024</u>		<u>FY 2025</u>		<u>FY 2026</u>		<u>FY 2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b><i>B. Operating Expenditures</i></b>								
1. Travel	\$10,000		\$10,000		\$10,000		\$10,000	
2. Professional Services								
3. Other Services	\$10,000		\$10,000		\$10,000		\$10,000	
4. Communications								
5. Materials and Supplies								
6. Rentals								
7. Materials & Goods for Manufacture & Resale								
8. Miscellaneous								
<b><i>Total Operating Expenditures</i></b>	<u>\$20,000</u>	<u>\$0</u>	<u>\$20,000</u>	<u>\$0</u>	<u>\$20,000</u>	<u>\$0</u>	<u>\$20,000</u>	<u>\$0</u>

	<u>FY 2024</u>		<u>FY 2025</u>		<u>FY 2026</u>		<u>FY 2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b><i>C. Capital Outlay</i></b>								
1. Library Resources								
2. Equipment								
<b><i>Total Capital Outlay</i></b>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>

**INSTRUCTION, RESEARCH AND STUDENT AFFAIRS  
APRIL 25, 2023**

**ATTACHMENT 1**

	FY <u>2024</u>		FY <u>2025</u>		FY <u>2026</u>		FY <u>2027</u>	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>D. Capital Facilities Construction or Major Renovation</b>	_____	_____	_____	_____	_____	_____	_____	_____
<b>E. Other Costs</b>								
Utilities	_____	_____	_____	_____	_____	_____	_____	_____
Maintenance & Repairs	_____	_____	_____	_____	_____	_____	_____	_____
Other	_____	_____	_____	_____	_____	_____	_____	_____
<b>Total Other Costs</b>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<b>TOTAL EXPENDITURES:</b>	<u>\$536,761</u>	<u>\$0</u>	<u>\$549,212</u>	<u>\$0</u>	<u>\$562,037</u>	<u>\$0</u>	<u>\$575,247</u>	<u>\$0</u>
<b>Net Income (Deficit)</b>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>

Budget Notes (specify row and add explanation where needed; e.g., "I.A., B. FTE is calculated using..."):

I.A.	FY24 headcount and FTE is 2 FT students, FY25 - 27 is 3 headcounts the FTE breakdown is 1 FT and 2 half-time students.
II.2.	Includes amounts for travel and other service expense categories.
III.A.1	FTE calculation does not include PhD graduate assistantships.
III.A.8	Fringe benefits calculate as (.1969*salary +12,500) for faculty and staff. Increase by 3% each FY for projections purpose. GA fixed and variable fringe also included in fringe calculations.
III.A.4.,9	PhD graduate assistantships salary @19,542*3, which includes funding to work over the summer. Essentially a year-round position @20 hours a week.
III.B.1	Travel is funding for PhD students to travel towards development and/or present research.
III.B.3	Other services in this case is for "mini-grants" we would like to award PhD students as a way to fund and advance their research focus while in the program.

December 21, 2022

### References

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Krasna H, Czabanowska K, Jiang S, Khadka S, Morita H, Kornfeld J, Shaman J. (2020). The Future of Careers at the Intersection of Climate Change and Public Health: What Can Job Postings and an Employer Survey Tell Us? *Int J Environ Res Public Health*. 2020 Feb 18;17(4):1310. doi: 10.3390/ijerph17041310. PMID: 32085475; PMCID: PMC7068354.

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## **Appendices:**

Appendix A: Curriculum Overview and Part-time Cohort-Based Plan of Study

Appendix B: Curriculum Maps and Key Assessment Guide

Appendix C: Letters of Support

Appendix D: External Review Report

Appendix E: Response to External Review Report

Appendix F: Curricula Vitae of Participating Faculty

## Appendix A

# Curriculum Overview and Part-time Cohort-Based Plan of Study

**Curriculum Overview**

<b>Course Title</b>	<b>Credits</b>
MPH 504: Applied Epidemiology	2
MPH 506: Applied Statistics in Public Health	2
MPH 540: Epidemiology and Biostatistics II	3
MPH 542: Epidemiology and Biostatistics III or Advanced Qualitative Research Methods	3
PPHL 610: Research Methods I	3
PPHL 610: Research Methods II	3
PPHL 630: Determinants of Health I: Theoretical Background	3
PPHL 631: Determinants of Health II: Application	3
PPHL 620: Advanced Systems Analysis and Problem Solving	3
PPHL 635: Health Policy Analysis	3
PPHL 621: Organizational Leadership in Public Health	3
PPHL 640: Evaluating Program, Policy and Organizational Performance	3
PPHL 670: Scientific Writing and Proposal Development	3
Cognate Courses	9
PPHL 691: Doctoral Comprehensive Examination	1
PPHL 689: Dissertation Proposal	2
PPHL 693: Doctoral Dissertation	<u>18</u>
<b>Total Credit Hours</b>	<b>67</b>



**Part-time Cohort-Based Recommended Plan of Study**

<b>Proposed PhD in Public and Population Health Leadership Curriculum (Part-time Example)</b>			
<b>Fall</b>	<b>Credits</b>	<b>Spring</b>	<b>Credits</b>
<b>Year 1</b>			
MPH 504: Applied Epidemiology (1 <sup>st</sup> 7 weeks)	2	MPH 540: Epidemiology and Statistics II	3
MPH 506: Applied Statistics in Public Health (2 <sup>nd</sup> 7 weeks)	2	PPHL 631: Determinants of Health II: Application	3
PPHL 630: Determinants of Health I: Theoretical Background	3		
<b>Year 2</b>			
PPHL 610: Research Methods I	3	PPHL 611: Research Methods II	3
PPHL 620: Advanced Systems Analysis and Problem-Solving	3	PPHL 621: Organizational Leadership in Public Health	3
<b>Year 3</b>			
PPHL 640: Evaluating Program, Policy, and Organizational Performance	3	PPHL 635: Health Policy Analysis	3
MPH 542: Epidemiology and Statistics III <i>or</i> PPHL 612: Advanced Qualitative Research Methods	3	Cognate Course	3
		PPHL 691: Comprehensive Examination	1
<b>Year 4</b>			
PPHL 670: Scientific Writing and Proposal Development	3	PPHL 689: Dissertation Proposal/Defense (1 <sup>st</sup> 7 weeks)	2
Cognate Course	3	PPHL 693: Dissertation Research (2 <sup>nd</sup> 7 weeks)	2
		Cognate Course	3
<b>Year 5</b>			
PPHL 693: Dissertation Research	8	PPHL 693: Dissertation Research	8
		<b>Total Credit Hours</b>	<b>67</b>

# Appendix B

## Curriculum Maps and Key Assessment Guide

Key: I = Introduced; R = Reinforced; A = Assessed

<b>Competency/Student Learning Outcomes (SLO)</b>	<b>Required Courses</b>											
	Applied Epidemiology	Applied Statistics	Epi/Stats 2	Research Methods 1	Research Methods 2	Determinants of Health 1	Determinants of Health 2	Adv. Systems Analysis	Adv. Policy Analysis	Organizational Leadership	Evaluating Organizations	Scientific Writing
SLO 1: Review and synthesize pertinent literature and formulate focused research questions that address identified knowledge gaps.				I	R,A		R,A	I			R,A	R,A
SLO 2: Conduct an analysis that identifies the root-cause determinants of health associated with a public health problem in a specific community that includes recommendations for effective community engagement, communications, policy, and practice within that community.						I	R,A	I				
SLO 3: Design and implement a quantitative, qualitative, or mixed methods research study that investigates a public health problem.				I	R,A				R,A		R,A	
SLO 4: Develop and implement a data analysis plans that (a) describe a public health problem, (b) identify key risk and protective factors associated with the problem, (c) assess changes over time, and (d) evaluate the effectiveness of attempts to intervene.	I	I	R,A	I	R,A				R,A		R,A	
SLO 5: Design a multi-level intervention using a multidisciplinary, data-informed, systems-approach to address a public health problem.						I	R	R	R,A			
SLO 6: Evaluate an organization's readiness to address a public health problem, including recommendations for enhancing operational readiness and sustaining organizational readiness over time.								I		R,A		
SLO 7: Evaluate an organization's performance while attempting to address a public health problem, including providing an evaluation report/presentation that describes their performance and recommendations for future action.								I			R,A	
SLO 8: Lead public health organizations and research teams as they identify public health problems and conduct and implement research-based solutions.										I, A		
SLO 9: Communicate research findings and recommendations for action to the scientific community and the community-at-large through peer-reviewed publications and presentations, and other public health community audiences.	I		I	R	R	R	R,A	R	R,A	R,A	R	R,A

**Outcomes**

<b>Competency/Student Learning Outcomes (SLO)</b>	<b>Required Courses</b>											
	Applied Epidemiology	Applied Statistics	Epi/Stats 2	Research Methods 1	Research Methods 2	Determinants of Health 1	Determinants of Health 2	Adv. Systems Analysis	Adv. Policy Analysis	Organizational Leadership	Evaluating Organizations	Scientific Writing
1. Explain public health history, philosophy and values.						x	x					
2. Identify the core functions of public health and the 10 Essential Services.						x	x			x	x	
3. Explain the role of quantitative and qualitative methods and sciences in describing and assessing a population's health	x	x	x									
4. List major causes and trends of morbidity and mortality in the US or other community relevant to the school or program.						x	x					
5. Discuss the science of primary, secondary and tertiary prevention in population health, including health promotion, screening, etc.						x	x	x	x			
6. Explain the critical importance of evidence in advancing public health knowledge.	x	x	x	x	x							x
7. Explain effects of environmental factors on a population's health.						x	x					
8. Explain biological and genetic factors that affect a population's health.						x	x					
9. Explain behavioral and psychological factors that affect a population's health.						x	x					
10. Explain the social, political and economic determinants of health and how they contribute to population health and health inequities.						x	x					
11. Explain how globalization affects global burdens of disease.						x	x					
12. Explain an ecological perspective on the connections among human health, animal health and ecosystem health (eg, One Health).						x	x					

## Key Assessment Guide

Competency/Student Learning Outcome	Key Assessment
SLO 1: Review and synthesize pertinent literature and formulate focused research questions that address identified knowledge gaps.	<p><i>Key Assessment for SLO 1:</i> Dissertation Proposal</p> <p><i>Assessment Description:</i> Students will demonstrate the ability to synthesize literature and formulate a focused research question by producing and defending a PhD dissertation proposal.</p> <p><i>Assessed In:</i> Dissertation Proposal.</p>
SLO 2: Conduct an analysis that identifies the root-cause determinants of health associated with a public health problem in a specific community that includes recommendations for effective community engagement, communications, policy, and practice within that community.	<p><i>Key Assessment for SLO 2:</i> Problem Analysis Report</p> <p><i>Assessment Description:</i> A problem analysis report will show that students can identify root causes by comparing and contrasting contexts that generate different health patterns.</p> <p><i>Assessed In:</i> Advanced Systems Analysis and Problem-Solving and Determinants of Health 2.</p>
SLO 3: Design and implement a quantitative, qualitative, or mixed methods research study that investigates a public health problem.	<p><i>Key Assessment for SLO 3:</i> Data Analysis Plan</p> <p><i>Assessment Description:</i> Data analysis plans and dissertation proposals illustrate students' capacity for applying scientific reasoning and research methods to public health problems.</p> <p><i>Assessed In:</i> Research Methods 2 and Dissertation Proposal.</p>
SLO 4: Develop and implement a data analysis plans that (a) describe a public health problem, (b) identify key risk and protective factors associated with the problem, (c) assess changes over time, and (d) evaluate the effectiveness of attempts to intervene.	<p><i>Key Assessment for SLO 4:</i> Research Methods Proposal</p> <p><i>Assessment Description:</i> Students will prepare mock study proposals which demonstrate the ability to formulate a research question that addresses a gap in scientific knowledge and apply appropriate methods for addressing the problem and illustrating effective interpretation of hypothetical study findings.</p> <p><i>Assessed In:</i> Epidemiology/Biostatistics 3 or Advanced Qualitative Research Methods.</p>
SLO 5: Design a multi-level intervention using a multidisciplinary, data-informed, systems-approach to address a public health problem.	<p><i>Key Assessment for SLO 5:</i> Intervention Plan</p> <p><i>Assessment Description:</i> An intervention plan shows students' ability to contextualize a health outcome within a set of institutional or organizational arrangements that have shaped policy and affected a pattern of health in society and identify theoretical changes that might improve outcome.</p> <p><i>Assessed In:</i> Advance Policy Analysis.</p>
SLO 6: Evaluate an organization's readiness to address a public health problem, including recommendations for enhancing operational readiness and sustaining organizational readiness over time.	<p><i>Key Assessment for SLO 6:</i> Organizational Readiness Report</p> <p><i>Assessment Description:</i> This report demonstrates students' ability to understand the importance of organizations' capacity to address health issues and the required resources and their effective application necessary for generating results.</p> <p><i>Assessed In:</i> Organizational Leadership in Public Health.</p>
SLO 7: Evaluate an organization's performance while attempting to address a public health problem, including providing an evaluation report/presentation that describes their performance and recommendations for future action.	<p><i>Key Assessment for SLO 7:</i> Evaluation Report</p> <p><i>Assessment Description:</i> By combining materials from various courses, students will show the capacity to understand organizations part in affecting health issues, the need to make organizational change to address these, and to create a research framework for identifying ways to move to a healthier environment.</p> <p><i>Assessed In:</i> Evaluating Program, Policy, and Organizational Performance.</p>

November 24, 2021

<p>SLO 8: Lead public health organizations and research teams as they identify public health problems and conduct and implement research-based solutions.</p>	<p><i>Key Assessment for SLO 8: Action Report</i>  <i>Assessment Description:</i> An action report demonstrates students' recognition of the role of leaders in directing organizations efforts to identify public health problems, and generating and implementing solutions.  <i>Assessed In:</i> Organizational Leadership in Public Health.</p>
<p>SLO 9: Communicate research findings and recommendations for action to the scientific community and the community-at-large through peer-reviewed publications and presentations, and other public health community audiences.</p>	<p><i>Key Assessment for SLO 9: Review of Assessments Above</i>  <i>Assessment Description:</i> Communication will be emphasized throughout the course curriculum. Students' ability to clearly communicate public health concepts, objectives and findings will be assessed via the components described above.  <i>Assessed In:</i> Each of the key assessments listed above.</p>

## Appendix C Letters of Support



IDAHO DEPARTMENT OF  
**HEALTH & WELFARE**

BRAD LITTLE – GOVERNOR  
DAVE JEPPESEN – DIRECTOR

ELKE SHAW-TULLOCH, MHS – ADMINISTRATOR  
DIVISION OF PUBLIC HEALTH  
450 West State Street, 4<sup>th</sup> Floor  
Boise, Idaho 83720-0036  
PHONE 208-334-6996

September 21, 2022

Idaho State Board of Education  
650 West State Street  
Boise ID 83702

To Whom It May Concern:

I am the State Health Official and Administrator of the Division of Public Health (DPH), Idaho Department of Health and Welfare. I am also a Boise State alumni and currently adjunct faculty. It is my pleasure to write this letter of support for the Doctor of Philosophy (PhD) in Public and Population Health Leadership degree program proposed by the School of Public and Population Health in the College of Health Sciences at Boise State University.

We have had a decades-long relationship with Boise State. The following are just a few activities describing our collaborative work with students and faculty:

- DPH staff routinely provide guest lectures to students on topical areas to describe their personal journeys in public health and experiences.
- Over the years, many DPH staff have served as adjunct faculty providing instruction on leadership and strategic planning, foundational public health, toxicology, laboratory skills, etc.
- DPH provides internship opportunities for both undergraduate and graduate level students. These internship opportunities are both non-funded and funded and offered through a wide array of public health programs.
- DPH leadership have served on a variety of university boards to provide input on academic and practical skills needed in future public health workforce.
- DPH has also enjoyed a contractual relationship with Boise State to provide services such as programmatic evaluation support, surveying and needs assessments, data and informatics support, etc.
- Boise State and DPH have also had a strong partnership during the COVID-19 pandemic providing testing, vaccinations, and contact tracing.

I am confident the PhD in Public and Population Health Leadership program offered through Boise State will provide students with the advanced scientific knowledge and skills needed to work effectively as leaders, health strategists, and advocates. I look forward to working



Page 2 of 2

with the PhD professionals as they graduate the program and become future leaders in the Division of Public Health.

Sincerely,

A handwritten signature in black ink, appearing to read 'Elke Shaw-Tulloch', with a stylized flourish at the end.

Elke Shaw-Tulloch, MHS Idaho State Health  
Official  
Administrator, Division of Public Health Idaho Department of  
Health and Welfare



IDAHO ASSOCIATION OF PUBLIC HEALTH DISTRICT DIRECTORS

September 14, 2022

Idaho State Board of Education
650 West State Street
Boise ID 83702

To Whom It May Concern:

As the Chair for the Idaho Association of Public Health District Directors, it is my pleasure to write this letter on behalf of all seven Local Public Health Directors, in support for the Doctor of Philosophy (PhD) in Public and Population Health Leadership degree program proposed by the School of Public and Population Health in the College of Health Sciences at Boise State University.

The seven Local Public Health Districts work with BSU faculty and students to provide a training ground in Public Health. Recruitment of a masters and PhD prepared workforce has been an ongoing challenge in Idaho. Having a program in Public and Population Health that is located at BSU would strengthen our workforce needs in Local Public Health by providing an Idaho option for current staff and other students interested in pursuing this extended degree. All seven Local Public Health Districts have struggled with workforce capacity and training. Having this PhD program in Idaho would assist in building and expanding our much needed professional Public Health workforce.

It is very exciting that experts in the field of Public Health as well as students could have this education opportunity in Idaho, through Boise State. Being able to access a PhD program in Public and Population Health in Idaho, will allow Idahoans to remain and receive this degree in our great State. The seven local Public Health Directors support BSU and their efforts to bring this PhD program in Public and Population Health Leadership to Idaho.

Sincerely,

Handwritten signature of Carol M Moehrle

Carol M Moehrle, Chair
Idaho Association of Public Health District Directors

Table with 7 columns: Name, Title, Phone Number. Rows include Don Duffy (PHO 1), Carol Moehrle (PHD2), Nikole Zogg (PHD3), Russ Duke (5PoHD4), Melody Bowyer (PHD5), Maggie Mann (PHD6), and James Corbett (PHD7).



Idaho State Board of Education  
650 West State Street  
Boise ID 83702

September 16, 2022

To Whom It May Concern:

My name is Angie Gribble, and I am a Senior Director of Community Health & Engagement for St. Luke's Health System. I am pleased to write this letter of support for the Doctor of Philosophy (PhD) in Public and Population Health Leadership degree program proposed by the School of Public and Population Health in the College of Health Sciences at Boise State University.

St. Luke's Health System and Boise State University have a rich partnership working with students, faculty and staff in the following ways:

- Conducting research and evaluation projects to advance both clinical and community models that improve patient care and community health;
- Internship and employment opportunities within St. Luke's for current students and recent graduates with both clinical experience and degrees as well as advanced skills in health/public health-related fields;
- Implementation of community-based interventions addressing key populations such as seniors, caregivers, the Hispanic/Latino community, and youth;
- Sponsorship and activation of community health education and outreach; and,
- Collaboration on Community Health Needs Assessments

The history of our partnership with Boise State demonstrates our significant confidence in the university to deliver unique, high-quality experiences, expertise and resources that result in impactful activities to improve the health and quality of life for members of our community. The depth of expertise Boise State has already brought to the table is impressive and highly sought after; however, the complexity of the work needed in our community demands an expansion of educational opportunities in public health in Idaho.

I am confident the PhD in Public and Population Health Leadership program offered through Boise State will provide students with the advanced scientific knowledge and skills needed to work effectively as leaders, health strategists, and advocates.

Sincerely,

Angie Gribble  
Senior Director, Community Health & Engagement  
St. Luke's Health System

Community Health  
St. Luke's Health System  
190 East Bannock Street  
Boise, Idaho 83712





February 24, 2023

Idaho State Board of Education  
650 West State Street  
Boise, Idaho 83702

To Whom It May Concern:

As the President & CEO at Saint Alphonus Health System, I am pleased to write this letter of support for the Doctor of Philosophy (PhD) in Public and Population Health Leadership degree proposed by the School of Public and Population Health in the College of Health Sciences at Boise State University.

Saint Alphonus and Boise State University have a rich history of partnership. We have worked together in a wide variety of ways to support meeting workforce demands, preparing future clinicians and health leaders for successful careers, and providing the highest standards of care to patients in Idaho.

We are pleased to see a program designed to prepare high-level public health and health industry leaders to leverage and combine scientific, leadership, data-informed decision-making, and communications skills to work effectively within communities to solve large scale problems that negatively impact community members, their loved ones, and their neighbors.

Based on our history of working closely together, I am confident that the University has the talent and expertise necessary to successfully implement this degree program in a manner that improves the health and quality of life of Idaho communities. We would certainly be interested in hiring leaders with a strong background in the science of health, leadership, data-informed decision-making, and communications in our organization. As such, we support this important program proposal.

Sincerely,

Odette Bolano, FACHE, MHA, BSN  
President and CEO  
Saint Alphonus Health System



Department of Veterans Affairs Medical Center
500 W. Fort Street
Boise, Idaho 83701
In Reply Refer To: 531/00

September 12, 2022

Idaho State Board of Education
650 West State Street
Boise ID 83702

To Whom It May Concern:

The Boise Veterans Affairs (VA) Medical Center has collaborated with Boise State University (BSU) to train health care professionals for work in Idaho for decades. I am pleased to write this letter of support to expand BSU's training opportunities with the Doctor of Philosophy (PhD) in Public and Population Health Leadership degree program proposed by the School of Public and Population Health in the College of Health Sciences. We hope that students and graduates of the proposed program also train and work at our facility.

The Boise VA has served as a training site for hundreds of Boise State University health professions trainees. These include nurses, respiratory therapists, social workers, and radiology technicians. We hire graduates of these programs regularly, and they constitute a significant portion of our health care work force. As a result, Boise State and the Boise VA's success are interdependent. As the population of the state of Idaho and the Treasure Valley increase, the complexity of our hospital operations also grows. Adding doctorate level training programs at BSU in the health sciences is needed to match this growth.

I am confident the PhD in Public and Population Health Leadership program offered through Boise State will provide students with the advanced scientific knowledge and skills needed to work effectively as leaders, health strategists, and advocates to improve the health of veterans and Idahoans.

Sincerely,

David Wood 161865;
O, gotally s, go, ed by
David P. Wood 161865
2 1 09 3
9 0 1

David P. Wood, MHA, FACHE
Medical Center Director
Boise VA Medical Center



October 2, 2022

Sarah E. Toevs PhD  
Professor, School of Public and Population Health  
Director, Center for Study of Aging  
Boise State University

RE: letter of support for a PhD program in Public and Population Health Leadership at Boise State University.

It is with extreme pleasure that I write this letter of support for the Boise State University School of Public and Population Health as it looks to start a new PhD program in public and population Health leadership.

As the co-chair of the Health Care Transformation Council of Idaho, this particular type of leadership position is much needed in the state of Idaho. This program will prepare master's degree graduates and professionals for practice-based leadership positions in public health, other public and private health promoting agencies, and health care organizations. This program will clearly help advance scientific knowledge and practical skills for administrators, health strategists and health care advocates. These future leaders will have in-depth knowledge of scientific methods and have the skills needed to both identify issues and lead diverse multiple disciplinary teams.

Effective and efficient health care in the future will be a team-based sport. It will rely on the type of leader that can inspire, motivate and direct an entire interdisciplinary team for value-based health outcomes that tackle issues of quality, cost and decrease disparities in health care. It is with great enthusiasm that I support this much needed graduate curriculum to help produce these future leaders in Public and Population Health Leadership at Boise State University.

Respectfully,

A handwritten signature in black ink that reads "Ted Epperly MD". The signature is written in a cursive style and is positioned below a horizontal line.

Ted Epperly, M.D., President and CEO  
Full Circle Health, Boise, Idaho 83704  
Clinical Professor of Family Medicine, University of Washington School of Medicine  
Past President and Board Chairman, American Academy of Family Physicians

## Appendix D

# PhD in Public and Population Health Leadership

## Site Visit Report

**Boise State University  
Site Visit Report  
PhD in Public and Population Health Leadership (Proposed)  
School of Public and Population Health  
Campus Site Visit: November 16-18, 2022  
Date of Report: November 23, 2022**

**External Reviewers**

Linda A. Alexander, EdD  
Chief Academic Officer, Association of Schools and Programs of Public Health (ASPPH) and Professor,  
Adjunct Status, West Virginia University School of Public Health

Steven Lacey, PhD, CIH, CSP  
Professor and Chief, Division of Public Health  
University of Utah School of Medicine



## Executive Summary

Based on the exceptionally detailed and comprehensive proposal provided, the review team was able to immediately identify the rationale for the PhD in Public and Population Health Leadership. This finding is based on the proposed degree's relevance to the Idaho public health workforce and societal needs, a constituent base of overwhelmingly positive and enthusiastic supporters, and the financial and institutional infrastructure necessary to add a new program in relationship to the University's growth.

The proposal is meticulous in its identification of required faculty, student, and administrative support, resources devoted to the program, and the vision for milestones in the development of the trajectory for the new PhD program. The report also provides a summary of potential challenges, pitfalls, and remedies. The reviewers are impressed with the documentation that represents the scaffolding of the relationship between the Undergraduate, Masters, and the proposed PhD and the specific population targeted for the degree. It is also very impressive to find a review dedicated to the current and future needs of the public health workforce with contemporary references from the CDC and the Bureau of Statistics. There is very good analysis of the proposed program in relationship to others in the region and the state which further highlights the gaps in leadership training as part of a comprehensive public health graduate degree. The

Overall, we find that Boise State University, the community, the workforce, faculty students, and practice partners would be served well by the addition of this exceptional program. The proposed PhD in Public Health and Population Health Leadership meets the expected scientific rigor of a graduate level terminal degree, identifies internal faculty with the knowledge, expertise, and background to teach, mentor, and successfully graduate doctoral students, and provides clear plans for "new" faculty with additional complimentary academic prowess, skills, and abilities. The program planning is aligned with the requirements for new programs at Boise State University and demonstrates the due diligence necessary to gain internal administrative support and external constituent support. At the conclusion of the site visit the reviewers see no reason that the program could not begin to offer classes to the first cohort in Fall 2023.

## Observations

**The following highlighted observations are not in hierarchical order and highlight the rationale for the overwhelmingly positive review as stated in the Executive Summary:**

- Key leaders, administrators, and faculty cleared their schedules to meet with the review team and were obviously familiar with the planned PhD program signaling a critical phase of proposal development.
- External letters of support represented a true commitment from potential employers and key stakeholders in the development of a new educational program to prepare the Idaho public health workforce.
- The rationale for the proposed PhD program aligns with Boise State University's responsiveness to its constituency base.
- The faculty identified to lead in the new PhD program are research scientist scholars who will provide excellent mentorship and career development opportunities for students enrolled in this program.
- The PhD proposal is aligned with Boise State University's mission and vision relevant to an *"innovative, transformative, and equitable educational environment that prepares students for success and advances Idaho and the world."*

- The PhD program in Public and Population Health Leadership has the potential to become a national and international model with the defined focus on leadership as a core foundation for the scientist leader and practitioner.
- There is clear and methodically built support for this program across stakeholders and at all levels, signaling important comprehensive buy-in.
- The research infrastructure at Boise State University needs to mature with the program to be appropriately supportive. While there is clear commitment to the School of Public and Population Health and its individual faculty (faculty expressed this support with concrete examples), the new PhD program will take the research mission to the next level, requiring seamless transactional relationships and administrative oversight (e.g., engagement with IRB, nimbleness with external grants and contracts). This requirement is commensurate with a graduate degree of this caliber.
- Boise State University should plan for the anticipated demand for training of Scientist Leaders which may exceed the current planned numbers and attract national and international attention.
- Senior campus leadership has a vision aligned with the success of a new doctoral program which reflects inclusive excellence and student-centered care. Examples of this vision includes plans for more family-appropriate housing, a writing center, a care team to provide mental health support, global engagement, and the *Healthy Idaho* Grand Challenge.
- There is overwhelming support with Health Sciences school-level associate Deans and definitive plans to ensure that other colleges can learn from the proposed content and leverage courses.
- Current graduate students are thrilled to be a part of the Boise State School of Public and Population Health and articulated an extraordinary sense of belonging and worth, exceptional mentoring and professional development, and provided specific and concrete examples of supportive experiences with faculty members.
- Overwhelming support from the Provost with his recommendation that the new PhD program is *"needed, complementary to the state, and we can deliver"*
- University and School-level leaders must plan to continually incentivize faculty for their tremendous efforts at student-centered teaching and mentoring, and to accommodate the work-life balance needed to offer evening courses.
- Sophisticated and unique marketing and communication will be required to extend the program's reach to external academic, healthcare, and institutional audiences as well as potential funders.
- The Scientist Leader model in public health is sufficiently unique to evaluate and provide data leading to a new area of public health scholarship over the next two to three years.
- The scientist-practitioner-leader lens may be captured succinctly via a diagram or conceptual model to show the intersection of Population Health Science and Leadership.
- The proposal should include a brief narrative about the intentionality and rationale for the *PhD* as opposed to the *DrPH* typically associated with the intersection of leadership with public health (this was clearly explained to reviewers during site visit).

### Recommendations

Due to the potential visibility of a degree that is designed to innovate in the space of the traditional doctoral degree, it may be helpful to further enhance the leadership aspect of the proposed degree by doing one or more of the following:

- Consider changing the format of the traditional PhD dissertation to include a broader definition of scholarship, perhaps through a mix of peer-reviewed scientific publications, case studies in leadership, and/or lay communications for public engagement.
- Create a unique cognate track focused on organizational change and management by bundling some of the proposed and existing coursework into an area so that it is clear students would need to demonstrate proficiency in this area.
- Ensure that management and leadership scholars or executives are included as a part of the dissertation proposal committee and/or hold seats as part of the dissertation defense.
- Build in an opportunity for enrolled students to evaluate their current roles in the context of leadership and management.
- Ensure and better communicate the salience of the leadership aspect as a fundamental basis for the proposed coursework.
- Work closely with the Dean of Research to evolve the research infrastructure to support investigators.

## Appendix E

School of Public and Population  
Health Response to the PhD in  
Public and Population Health

Leadership Site Visit Report

### **SPPH Response to Boise State University Site Visit Report of the PhD in Public and Population Health Leadership (Proposed)**

We wish to thank Drs. Alexander and Lacey for their review of the School of Public and Population Health's PhD in Public and Population Health Leadership program proposal. We are grateful for the time and effort they put into their very thoughtful report.

There are three main points raised in the report, which we will work to address. First, the reviewers suggested this program may get national attention and generate more demand than originally expected and that that we should be prepared to enroll more students than currently planned. This was quite flattering to read, and, to their point, we shall keep University administrators informed of demand so that an adjustment of resources, particularly for additional graduate assistantships, may be considered.

Second, the reviewers suggested that we consider creating a unique cognate concentration focused on organizational change and management. We are intrigued by this idea and think the development of a formal concentration that graduates could use to demonstrate their proficiency in these subjects to prospective employers is worthy of further consideration.

Finally, the reviewers made some excellent recommendations pertaining to the structure of the PhD dissertation which will further enhance the innovativeness of the program. First, they suggested we will modify the scope of the PhD dissertation to "include a broader definition of scholarship, perhaps through a mix of peer-reviewed scientific publications, case studies in leadership, and/or lay communications for public engagement." We are indeed working towards creating a new and inventive form of dissertation. In addition, the reviewers recommended that we "build in an opportunity for enrolled students to evaluate their current roles in the context of leadership and management." We think this is another outstanding idea and will explore making this a possibility for PhD students.

Although Drs. Alexander and Lacey made some minor suggestions about how university-level processes related to research infrastructure might be enhanced to support the proposed PhD program, we believe their recommendations may be more in line with the needs of R1 designated institutions. Respectfully, we believe the processes currently offered at BSU meet the needs of our proposed program and future students.

We are delighted with the extremely positive review and feedback in Drs. Alexander's and Lacey's report on the proposed PhD program. We are grateful for their outstanding feedback and excited to incorporate their recommendations into the program as they will enhance the program and help produce exceptional PhD program graduates.

## Appendix F

# CVs for Participating Faculty

*Note:* In the pages that follow, you will find the CVs of our current faculty members who will participate in this program.

Additionally, we are in the process of hiring 5 new faculty members who will also participate in this program. These faculty members will consist of two associate/full professors and three assistant professors. We expect the professional preparation, experience, and productivity of these new faculty members to be similar to the existing faculty included in this section.

**Curriculum Vitae***(September 9, 2022)***Douglas J. Myers, ScD, MA**

Professor

School of Public Health and Population Science

Boise State University

Boise, ID 83725

[douglasmyers@boisestate.edu](mailto:douglasmyers@boisestate.edu)

(208) 426-4289

**EDUCATION**

- 2003      **Doctor of Science. Epidemiology**  
Department of Work Environment. University of Massachusetts, Lowell.
- 1998      **Master of Arts. Sociology**  
Department of Sociology. University of Massachusetts, Amherst.
- 1993      **Bachelor of Arts. Sociology**  
Department of Sociology. University of Massachusetts, Lowell.

**EXPERIENCE**

- 2022 – present      **Professor.** School of Public Health and Population Science. Boise State University. Boise, ID.
- 2012 – present      **Adjunct Faculty.** Department of Community and Family Medicine. Division of Occupational and Environmental Medicine. Duke University School of Medicine. Durham, NC.
- 2019 – present      **Adjunct Faculty.** Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Morgantown, WV.
- 2019 – 2022      **Associate Professor.** Department of Public Health and Population Science. Boise State University. Boise, ID.
- 2017 – 2019      **Associate Professor.** Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Morgantown, WV.
- 2018 - 2019      **WVU School of Public Health Scholar in Residence at the National Institute for Occupational Safety and Health.** School of Public Health. West Virginia University. Morgantown, WV and NIOSH, Morgantown, WV.
- 2012 – 2019      **Faculty Affiliate.** West Virginia University Injury Control Research Center. Morgantown, WV.
- 2013 - 2019      **Adjunct Assistant Professor of Sociology.** Department of Sociology and Anthropology. Eberly College of Arts and Sciences. West Virginia University. Morgantown, WV.
- 2013 - 2016      **Faculty Affiliate.** Research Center on Violence. Department of Sociology and Anthropology. Eberly College of Arts and Sciences. West Virginia University. Morgantown, WV.

2012 – 2017	<b>Assistant Professor.</b> Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Morgantown, WV.
2010 – 2015	<b>Faculty Affiliate.</b> Duke Network Analysis Center. Duke University. Durham, NC.
2010 - 2012	<b>Assistant Professor</b> (tenure track). Department of Community and Family Medicine. Division of Occupational and Environmental Medicine. Duke University School of Medicine. Durham, NC.
2006 – 2010	<b>Assistant Professor</b> (non-tenure track). Department of Community and Family Medicine. Division of Occupational and Environmental Medicine. Duke University School of Medicine. Durham, NC.
2005 – 2006	<b>Postdoctoral Research Fellow, Epidemiology.</b> Department of Epidemiology and Biostatistics, School of Public Health. University of Illinois. Chicago, IL.
2003 - 2005	<b>Epidemiology Program Analyst.</b> College of Health Professions, University of Massachusetts Lowell. Lowell, MA.
1998 - 2003	<b>Graduate Teaching Assistant and Research Assistant.</b> Department of Work Environment. University of Massachusetts Lowell. Lowell, MA.
1998 – 1999	<b>Analyst II.</b> Safety and Health Assessment for Research and Prevention (SHARP). Washington Department of Labor and Industries. Olympia, WA.
1993 – 1997	<b>Graduate Teaching Assistant and Research Assistant.</b> Department of Sociology. University of Massachusetts Amherst. Amherst, MA.
1992 – 1993	<b>Undergraduate Teaching Assistant and Research Assistant.</b> Department of Sociology. University of Massachusetts Lowell. Lowell, MA.

## HONORS AND AWARDS

*\*Indicates student collaboration.*

2017	<b>National Council on Occupational Safety and Health – National Conference on Worker Safety and Health Poster Session Winner (1<sup>st</sup> Place).</b> “Results from A Study of Health and Safety Programs and Committees in Unionized Metal and Non-Metal Mines in the United States”. <b>Myers, DJ</b> , Lessin, N, Frederick, J, McCormick, S.*, and Wright MJ. Baltimore, MD. December, 2017.
2016	<b>Population Association of America Poster Session Winner (1<sup>st</sup> Place).</b> “An Exploration of Woodard’s “American Nations” for Predicting Cause-Specific US Mortality.” Cossman, JA, <b>Myers, DJ</b> and Wolf, JK*.
2011	<b>National Occupational Injury Research Symposium (NORA) Intervention Evaluation Contest Winner.</b> "Evaluating the effect of an intervention to prevent patient-handling injuries among hospital workers: Support for the collection of intermediate measures of intervention adoption and the integration of quantitative and qualitative methods." Schoenfisch AL, Lipscomb HJ, <b>Myers DJ</b> , Pompeii LA, Dement JM & James T.



- 2011            **LEADER Program.** Selected into the Leadership Development for Researchers program. Office for Faculty Development. Duke University School of Medicine. Durham, NC.
- 2009            **Paper of the Month Winner.** Editorial: "Epidemiologists, Our Patient is Society," (New Solutions, Vol. 18[2]). Awarded by the Department of Work Environment, University of Massachusetts Lowell.
- 2004            **Lorin E. Kerr Dissertation Award.** "The Social Distribution of Risk at Work: Acute Injuries and Physical Assaults among Healthcare Workers." Awarded by the Department of Work Environment, University of Massachusetts Lowell.
- 1999 – 2001    **Doctoral Traineeship.** National Institute for Occupational Safety and Health.

### PROFESSIONAL MEMBERSHIPS

- 2005 – present    American Public Health Association (Occupational Health and Safety Section)
- 2021 – present    Idaho Public Health Association
- 2015 – 2017        Complex Interactive Processes Institute
- 2012 – 2017        American Sociological Association
- 2013 – 2016        American Society of Safety Engineers

### PUBLICATIONS

*\*Indicates student collaboration.*

#### Manuscripts in Progress (working titles)

1. Gwilliam, M\*, Konda S, and **Myers, DJ.** Occupational injuries among building cleaners in the United States. Target Journal: *J Saf Res.*
2. **Myers, DJ,** and Kriebel, D. If smoking were eliminated, which counties would still have high rates of smoking-related cancers? Target Journal: *Env Hlth Persp*

#### Peer-reviewed Articles

1. Evans, KW\*, **Myers, DJ,** Rockefeller, K, Rauscher, KJ, Allen, A, and Gao, W. (2021). A Qualitative Exploration of the Lift Equipment Uses and Needs of Physical and Occupational Therapists Participating in Safe Patient Handling Programs. *Int J Safe Patient Handling and Mobility.* 11(2):76-85.
2. **Myers, DJ,** Clapp, R, Jacobs, M, Hoppin, P, and Kriebel, D. (2021). Letter to the Editor: Cancer rates not explained by smoking: how to investigate a single county. *Env Health,* 20, Article number: 62. May 21, 2021.

3. Lundstrom, EW\*, **Myers, DJ**, Lundstrom, WJ, Rauscher, KJ, and Fullen, MA. (2021). Comparison of Owner/Operator and Employee Perceptions of Occupational Hazards and Safety Practices in the Logging Industry of West Virginia. *Am J Ind Med.* Apr;64(4):301-309. <https://doi.org/10.1002/ajim.23228>
4. Rauscher KJ, Bush D, Chang C, and **Myers DJ**. (2020). Occupational Safety and Health Education in Post-secondary Career Technical Education Construction Programs. *Career and Tech Ed Res.* Dec;45(3):63-81(19).
5. **Myers, DJ**, Clapp, R, Jacobs, M, Hoppin, P, and Kriebel, D. (2020). Cancer Rates Not Explained by Smoking: A County-Level Analysis. *Env Health.* **19**, Article number: 64. <https://doi.org/10.1186/s12940-020-00613-x>
6. Brown B\*, **Myers DJ**, Casteel, C, and Rauscher, KJ. (2020). Exploring differences in the workplace violence experiences of young workers in middle and late adolescence in the United States. *J Safety Res.* Special Issue: NOIRS 2018. Vol 74; Sep;74:263-9.
7. Bush, D, Chang, C., Rauscher, K and **Myers, DJ**. (2019). Essential Elements for Effective Safety and Health Education in Post-Secondary Construction Career Technical Education. *New Solut.* May;29(1):53-75.
8. Branch, LB\*. Eller, WS, Bias, TK, McCawley, MA, **Myers, DJ**, Gerber, BJ, Bassler, JR. (2019). Trends in Malware Attacks against United States Healthcare Organizations, 2016-2017. *Global Biosecurity*, 1(1):15–27.
9. Rauscher, KJ, **Myers, DJ**, and Miller, M. (2016). Work-Related Deaths among Youth: Understanding the Contribution of US Child Labor Violations. *Am J Ind Med.* Nov;59(11):959-968.
10. Rauscher, KJ and **Myers DJ**. (2016). Occupational Fatalities among Young Workers under the Age of 18 in the US: 2001-2012. *Am J Ind Med.* Jun;59(6):445-452.
11. **Myers, DJ**, Lipscomb, HJ, Epling, C, Hunt, D, Richardson, W and Dement, JM. (2016). Surgical Team Stability and Risk of Percutaneous Blood and Body Fluid Exposures during Surgical Procedures. *Infect Control Hosp Epidemiol.* May;37(5):512-18.
12. **Myers, DJ**, Lipscomb, HJ, Epling, C, Hunt, D, Richardson, W and Dement, JM. (2016). Surgical Procedure Characteristics and Risk of Sharps-Related Blood and Body Fluid Exposure. *Infect Control Hosp Epidemiol.* Jan;37(1):80-7.
13. Rauscher, KJ, Casteel, C, Bush, D, and **Myers, DJ**. (2015). Factors Affecting High School Teacher Adoption, Sustainability and Fidelity to the “Youth@Work: Talking Safety” Curriculum. *Am J Ind Med.* Dec;58(12):1288-1299.
14. Rauscher, KJ and **Myers DJ**. (2014). Occupational Health Literacy and Work-related Injury among US Adolescents. *Int J Inj Contr Saf Promot*, 21(1):81-89.
15. **Myers, DJ**, Nyce, JM, and Dekker, SWA. (2014). Setting Culture Apart: Distinguishing Culture from Behavior and Social Structure in Safety and Injury Research. *Accid Anal Prev*, Special Edition on Systems Thinking in Workplace Safety and Health, Jul;68:25-29.
16. Schoenfisch, AL, Lipscomb, HJ, Pompeii, LA, **Myers, DJ**, and Dement, JM. (2013). Musculoskeletal injuries among hospital patient care staff before and after implementation of patient lift and transfer equipment. *Scand J Work Environ Health*, 39(1):27-36.
17. Lipscomb, HJ, Nolan, J, Patterson, D, Sticca, V, and **Myers DJ**. (2013). Safety, incentives, and the reporting of work-related injuries among union carpenters: “You’re pretty much screwed if you get hurt at work.” *Am J Ind Med*, Apr;56(4):389-99.

18. Dekker, SWA, Nyce, JM, and **Myers, DJ**. (2013). The Little Engine Who Could Not: “Rehabilitating” the Individual in Safety Research. *Cogn Technol Work*, 15(3): 277-282.
19. Rauscher, KJ, **Myers, DJ**, Runyan, CW, and Schulman, M. (2012). Young worker safety in construction: Do family ties and workgroup size affect hazard exposure and safety practices? *Work*, 42(4):549-58.
20. **Myers, DJ**, Schoenfisch, AL, and Lipscomb, HJ. (2012). Cultural Influences on Workplace Safety: An Example of Hospital Workers' Adoption of Patient Lifting Devices. *Saf Sci*, 50(3): 494-501.
21. Lipscomb, HJ, Schoenfisch, AL, **Myers, DJ**, Pompeii, LA, and Dement JM. (2012). Evaluation of direct workers' compensation costs for musculoskeletal injuries surrounding a hospital-wide policy change to minimal lifting of patients and institution of patient lift equipment using longitudinal data and an internal injury control. *Occup Environ Med*, May;69(5):367-72.
22. Shishlov, KS\*, Schoenfisch, AL, **Myers, DJ**, and Lipscomb, HJ. (2011). Non-fatal construction industry fall-related injuries treated in US emergency departments, 1998-2005. *Am J Ind Med*, Feb;54(2):128-35.
23. Schoenfisch, AL, Pompeii, LA, **Myers, DJ**, James, T, Yeung, Y, Fricklas, E, Pentico, M, and Lipscomb, HJ. (2011). Objective measures of adoption of patient lift and transfer devices to reduce nursing staff injuries in the hospital setting. *Am J Ind Med*, Dec;54(12):935-45.
24. Schoenfisch, AL, **Myers, DJ**, Pompeii, LA, and Lipscomb, HJ. (2011). Implementation and Adoption of Mechanical Patient Lift Equipment in the Hospital Setting: The Importance of Organizational and Cultural Factors. *Am J Ind Med*, Dec;54(12):946-54.
25. Schoenfisch, AL, Lipscomb, HJ, **Myers, DJ**, Fricklas, E, and James, T. (2011). A lift assist team in an acute care hospital – Prevention of injury or transfer of risk during patient-handling tasks? *AAOHN J*, Aug;59(8):329-34.
26. Schoenfisch, AL, Lipscomb, HJ, Shishlov, KS\*, and **Myers, DJ**. (2010). Nonfatal construction industry-related injuries treated in hospital emergency departments in the U.S., 1998-2005. *Am J Ind Med*, 53(6):570-580.
27. Rodriguez-Acosta, R\*, **Myers, DJ**, Lipscomb, HJ, Dement, JM, Richardson, D, and Chen, JC. (2010). Physical Assault among Nursing Staff Employed in Acute Care. *Work*, Jan;35(2):191-200.
28. **Myers, DJ** and Lipscomb, HJ. (2010). Informal Social Status among Coworkers and Risk of Work-related Injury among Nurse Aides in Long-term Care. *Am J Ind Med*, May;53(8):514-523.
29. Lipscomb, HJ, Schoenfisch, AL, Shishlov, KS\*, and **Myers, DJ**. (2010). Nonfatal tool- or equipment-related injuries treated in US emergency departments among workers in the construction industry, 1998-2005. *Am J Ind Med*, Jun;53(6):581-7.
30. Rodriguez-Acosta, R\*, Richardson, D, Lipscomb, HJ, Chen, JC, Dement, JM, **Myers, DJ**, and Loomis, D. (2009). Occupational Injuries among Aides and Nurses in Acute Care. *Am J Ind Med*, Dec;52(12):953-964.
31. Lipscomb, HJ, Pompeii, LA, **Myers, DJ**, Schoenfisch, AL, and Dement JM. (2009). Systematic reviews of workplace injury interventions: What are we missing? *Med Lav*, 100, 4: 247-257.
32. Dement, JM, Loomis, D, Richardson, D, Wolf, S and **Myers, DJ**. (2009). Estimates of Historical Exposures by Phase Contrast and Transmission Electron Microscopy in North Carolina USA Asbestos Textile Plants. *Occup Environ Med*, Sep;66(9):574-83.

33. Dement, JM, Welch, L, Haile, E and **Myers, DJ**. (2009). Mortality Among Sheet Metal Workers Participating in a Screening Program. *Am J Ind Med*, Aug;52(8):603-13.
34. Rauscher, KJ and **Myers, DJ**. (2008). Socioeconomic disparities in the prevalence of work-related injuries among adolescents in the United States. *J Adolesc Health*, Jan;42(1):50-7.
35. **Myers, DJ**, Epling, C, Dement, JM, and Hunt, D. (2008). Risk of Sharp Device-Related Blood and Body Fluid Exposure in Operating Rooms. *Infect Control Hosp Epidemiol*, Dec;29(12):1139-48.
36. **Myers, DJ**, Kriebel, D, Karasek, R, Punnett, L and Wegman D. (2007). The social distribution of risk at work: Acute injuries and physical assaults among healthcare workers. *Soc Sci Med*, Feb;64(4):794-806.
37. **Myers, DJ**, Kriebel, D, Karasek, R, Punnett, L, and Wegman, D. (2005). Injuries and assaults in a long-term psychiatric care facility: an epidemiologic study. *AAOHN J*, 53(11), 489-498.
38. **Myers, DJ**, Silverstein, B, and Nelson, N. (2002). Predictors of Shoulder and Back Injuries in Nursing Home Workers: A Prospective Study. *Am J Ind Med*, 41, 466-476.
39. Kriebel, D, **Myers, DJ**, Chen, M, Woskie, S, and Cocanour, B. (2001). Short-term Effects of Formaldehyde on Peak Expiratory Flow and Irritant Symptoms. *Arch Environ Health*, 56:1, 11-18.
40. Eisen, EA, Smith, TJ, Kriebel, D, Woskie, SR, **Myers, DJ**, Kennedy, SM, Shalat, S, and Monson, RM. (2001). Respiratory Health of Automobile Workers and Exposures to Metal-Working Fluid Aerosols: Lung Spirometry. *Am J Ind Med*, 39, 443-453.
41. MacDougall, J, Minicucci, S, and **Myers, DJ**. (1995). The U.S. House of Representatives' Vote on the Gulf War, 1991: Measuring the Peace Movement Impact. *Res Soc Mov Confl Change*, 18, 255-84.

#### Editorials

1. Kriebel D and **Myers DJ**. (2022). Eliminating Toxics to Prevent Disease: Asbestos Leads the Way. Invited Perspective. *Env Health Persp*. 130(5) CID: 051305 <https://doi.org/10.1289/EHP11362>.
2. **Myers, DJ**. (2010). Education and Health Disparities: a Macro-, not a Micro-Phenomenon. *New Solut*, 20(2):175-7.
3. **Myers, DJ**. (2008). Epidemiologist, Our Patient is Society. *New Solut*, 18(2), 107-109.
4. **Myers, DJ**. (2006). The food industry's solution to the obesity epidemic: take a walk. *New Solut*, 16(1):13-6.

#### Media Publications:

1. **Myers, DJ**, Clapp, R, Jacobs, M, Hoppin, P, and Kriebel, D. (2021). "Smoking is a major cause of 12 types of cancer. If smoking were completely stopped, how much cancer would remain?" *CR3 News Magazine*. Vol 5, Lung Cancer Awareness Month. Pages 37, 39, 54. <https://viewer.joomag.com/cr3-news-magazine-2021-vol-5-november-2021-vol-5-nov-lung-cancer-awareness-month/0580123001632953923>

**Abstracts**

1. Jones DL, Robinson M, Selfe TK, Barnes L, Wen S, Shawley-Brzoska S, **Myers DJ**, Wilcox S. Barriers to use of the internet as an alternative delivery channel for an evidence-based fall-prevention intervention for older adults. *European Journal of Public Health*. 2022;32(Suppl 2): ckac095.141. <https://doi.org/10.1093/eurpub/ckac095.141>.
2. **Myers, DJ** and Rauscher, KJ. (2011). Socioeconomic Disparities in Work-Related Injury Prevalence among Teens. *Proceedings of the First National Conference on Eliminating Health and Safety Disparities at Work*. Chicago, IL. p. 56.
3. Rauscher, KJ, **Myers, DJ**, Runyan, CW, and Schulman, M. (2010). Exploring social contexts at work and how they affect the safety of young construction workers. *Inj Prev*. Vol. 16. Supplement No.1.

**Monographs and Reports**

\*Indicates student collaboration

1. Evans, KW\*, **Myers, DJ**, Rockefeller, K, Rauscher, KJ, and Allen, A. (2020). An In-Depth Exploration of Hospital-Based Physical and Occupational Therapists' Needs, Perceptions and Involvement Regarding Safe Patient Handling and Mobility Programs. Accepted by the *Johns Hopkins Education and Research Center for Occupational Safety and Health, Johns Hopkins University*. October, 2020.
2. **Myers, DJ**, Lessin, N, Frederick, J, and Wright MJ. (2018). Attitudes and Beliefs of Hourly Miners and Salaried Managers Regarding Safety and Health in U.S. Metal and Non-Metal Mines. Accepted by the *Alpha Foundation for the Improvement of Mine Safety*, June, 2018.
3. **Myers, DJ** and Whoolery, M. (2018). Effective MERD Training-Design, Implementation, Retention and Evaluation. Accepted by the *Alpha Foundation for the Improvement of Mine Safety*, January, 2018.
4. Bush D, Rauscher, KJ, Chang C, and **Myers DJ**. (2017). Your Construction Safety Program: Safe Students, Safe Workers A Guide for Administrators & Instructors in Post-Secondary Career Technical Education (CTE) Construction Programs.
5. Bush D, Rauscher, KJ, Chang C, and **Myers DJ**. (2017). 20 Questions to Find out How You and Your Program Are Doing! *Instructor Version*. For use in group discussion or professional development workshops on the guide.
6. Bush D, Rauscher, KJ, Chang C, and **Myers DJ**. (2017). 20 Questions to Find out How You and Your Program Are Doing! *Administrator Version*. For use in group discussion or professional development workshops on the guide.
7. Bush D, **Rauscher, KJ**, Chang C, and **Myers DJ**. (2017). Ten-minute On-line Assessment Tool. *Instructor Version*. Standalone tool for instructors to conduct a self-assessment of their program.
8. Bush D, **Rauscher, KJ**, Chang C, and **Myers DJ**. (2017). Ten-minute On-line Assessment Tool. *Administrator Version*. Standalone tool for administrators to conduct a self-assessment of their program
9. *Use of Workers' Compensation Data for Occupational Safety and Health: Proceedings from June 2012 Workshop*; National Institute for Occupational Safety and Health (NIOSH); Cincinnati, OH; Utterback, DF and Schnorr, TM, eds.; DHHS (NIOSH) Publication No. 2013-147; May 2013.

10. **Myers, DJ**, Dement, John M., Ringen, Knut and Welch, Laura. *Prevalence and Health Care Costs for Diabetes and Hypertension among Boilermakers and their Dependents*. Reported to the National Coordinating Committee for Multiemployer Plans (NCCMP), United Against Diabetes and Cardiovascular Disease (UAD/CVD). July 22, 2009.

## PRESENTATIONS

*\*Indicates student collaboration.*

### Refereed Presentations

#### International

#### Completed:

1. Jones DL, Robinson M, Selfe TK, Barnes L, Wen S, Shawley-Brzoska S, **Myers DJ**, and Wilcox S. Barriers to use of the internet as an alternative delivery channel for an evidence-based fall-prevention intervention for older adults. Programme of the 16<sup>th</sup> Annual Meeting and 11<sup>th</sup> Conference of HEPA Europe (European Network for the Promotion of Health-Enhancing Physical Activity), September 2021.
2. Rauscher, KR, Casteel, C, **Myers DJ**, and Peek-Asa, C. Young Victims of Sexual Harassment and Assault at Work in the U.S.: Results from a National Telephone Survey. XXII World Congress on Safety and Health at Work. September 20-23, 2021.
3. Rauscher, KR, Casteel, C, **Myers DJ**, and Peek-Asa, C. Characteristics and Consequences of Workplace Violence among Young Workers. XXII World Congress on Safety and Health at Work. September 20-23, 2021.
4. Lundstrom, E\*, **Myers, DJ**, Rauscher, K, Fullen, MD, Lundstrom, W. "A mixed-methods analysis of hazard perceptions in the West Virginia logging industry." Virtual presentation the International Society for Agricultural Safety and Health 2020 Conference. July 17, 2020.
5. Fullen, MD, **Myers, DJ**, Lundstrom, E\*, Rauscher, K, Donnelly, P, Lundstrom, W. "Timber-Safe: An organizational intervention to reduce West Virginia logger hazards." Virtual presentation the International Society for Agricultural Safety and Health 2020 Conference. July 17, 2020.
6. Lipscomb, HJ, Schoenfisch, AL, **Myers, DJ**, Pompeii, LA, and Dement JM. "Direct workers' compensation costs for patient handling injuries surrounding a hospital-wide policy change to minimal manual lifting of patients." 7<sup>th</sup> *International Conference on Prevention of Musculoskeletal Disorders (PREMUS)*. *International Commission of Occupational Health (ICOH)*. Angers, France. August, 2010.
7. Schoenfisch, AL, Lipscomb HJ, and **Myers, DJ**. "Use of a lift assist team in an acute care hospital setting: prevention or transfer of risk of patient-handling injury?" 7<sup>th</sup> *International Conference on Prevention of Musculoskeletal Disorders (PREMUS)*. *International Commission of Occupational Health (ICOH)*. Angers, France. August, 2010.
8. Schoenfisch, AL, **Myers, DJ**, Pompeii, LA, Dement, MJ, and Lipscomb, HJ. "Musculoskeletal injuries among hospital patient care staff before and after implementation of patient lift and transfer equipment." 7<sup>th</sup> *International Conference on Prevention of Musculoskeletal Disorders (PREMUS)*. *International Commission of Occupational Health (ICOH)*. Angers, France. August, 2010.
9. Rauscher KJ, **Myers DJ**, Runyan CW, and Schulman M. Exploring social contexts at work and how they affect the safety of young construction workers. 11<sup>th</sup> *Annual World Conference on Injury Prevention and Safety Promotion*. London, UK. June, 2010.
10. Rodriguez-Acosta, R\*, **Myers, DJ**, Lipscomb, HJ, Dement, JM, Richardson, D, and Chen, JC. Physical "Assault among Nursing Staff Employed in Acute Care." 20<sup>th</sup> *International Congress on Epidemiology in Occupational Health*. *International Congress on Occupational Health*. San Jose, Costa Rica. June, 2008.

11. **Myers, DJ.** “Social Status and Risk of Occupational Injury and Assault among Healthcare Workers.” *19<sup>th</sup> International Congress on Epidemiology in Occupational Health. International Congress on Occupational Health.* Banff, Alberta Canada. October, 2007.
12. Schoenfisch, AL, **Myers, DJ**, Pompeii, LA, and Lipscomb HJ. “Implementation and Adoption of a ‘Minimal Manual Lift Environment’ Program on Inpatient Nursing Units at Two Hospitals.” *19<sup>th</sup> International Congress on Epidemiology in Occupational Health, International Congress on Occupational Health,* Banff, Alberta, Canada, October, 2007.
13. Schoenfisch, AL, James, T, Fricklas, E, Yeung, YL, Pentico, M, Pompeii, LA, **Myers, DJ**, and Lipscomb HJ. “Creating a ‘minimal manual lift environment:’ Quantitative and qualitative intermediate measures.” *6<sup>th</sup> International Scientific Conference on Prevention of Work-Related Musculoskeletal Disorders (PREMUS).* Boston, MA. August, 2007.

### National

#### **Completed:**

1. Fullen, M, Lundstrom, E, **Myers, DJ**, Lundstrom, W, and Donnelly, P. (2022, May). Timber-Safe – Reduction of WV Logging Hazards through the Implementation of a Logging Operations Safety and Health Management System. Virtual National Occupational Injury Research Symposium (NOIRS).
2. Fullen, M., Takacs, B., Lundstrom, E., Lundstrom, W., Rauscher, K. J., & Myers, D. J. (2022, May). *Construction Trainer and Trainee Perspectives on the Quality and Effectiveness of the OSHA 10 Construction Course. National Occupational Research Agenda.* Morgantown, WV: National Institute for Occupational Safety and Health.
3. Lopez, C., Rauscher, K. J., Myers, D. J., & Casteel, C. (2022, May). *Young Worker Training on Workplace Violence. National Occupational Research Agenda. NIOSH.* Morgantown, WV: National Institute for Occupational Safety and Health.
4. Gwilliam, M\*, Srinivas, K, and **Myers, DJ.** Occupational injuries among building cleaners in the United States. American Public Health Association 2020 Annual Meeting and Expo, October 2020.
5. Rauscher KJ, Casteel C, **Myers DJ**, and Peek-Asa, C. Workplace Violence Against Youth: Characteristics and Consequences. Young Workers and Occupational Health and Safety Roundtable. 13th International Conference on Occupational Stress and Health. *American Psychological Association (APA), the National Institute for Occupational Safety and Health (NIOSH), and the Society for Occupational Health Psychology (SOHP). 2019 Annual Meeting.* November, 2019. Philadelphia, PA.
6. Rauscher KJ, Brown B\*, **Myers DJ**, Casteel C, Peek-Asa C. Young Victims of Sexual Harassment at Work: Results from a National Telephone Survey. *American Public Health Association (APHA), 2019 Annual Meeting,* Philadelphia, PA. November, 2019.
7. Bush D, Rauscher KJ, Chang C, and **Myers DJ.** Safe students, safe workers: What makes a strong health and safety program for new construction workers in community colleges? *American Public Health Association (APHA), Annual Meeting,* San Diego, CA. November, 2018.
8. Wolf, JK\*, Cossman, JA, and **Myers, DJ.** “Exploring Regional Classifications for Predicting Health Behaviors by Sex across United States.” *Annual Meeting of the Interdisciplinary Association for Population Health Science (IAPHS).* October, 2018.



9. **Myers, DJ**, Lessin, N, Frederick, J, and Wright MJ. Attitudes and Beliefs of Hourly Miners and Salaried Managers Regarding Safety and Health in U.S. Metal and Non-Metal Mines. *National Occupational Injury Research Symposium (NOIRS)*. Morgantown, WV. October, 2018.
10. Rauscher, KJ, Casteel, C., **Myers, DJ**, Peek-Asa, C and Branch, C. Workplace Violence against Youth: Results from a National Telephone Survey. *National Occupational Injury Research Symposium (NOIRS)*. Morgantown, WV. October, 2018.
11. Brown, B\*, **Myers, DJ**, Casteel, C and Rauscher, KJ. Understanding Differences in the Workplace Violence Experiences of Teens and Young Adults. *National Occupational Injury Research Symposium (NOIRS)*. Morgantown, WV. October, 2018.
12. **Myers, DJ**, Lessin, N, Frederick, J, and Wright MJ. Attitudes and Beliefs of Hourly Miners and Salaried Managers Regarding Safety and Health in U.S. Metal and Non-Metal Mines. *Society for Mining, Metallurgy and Exploration (SME) Annual Conference & Expo*. Minneapolis, MN. February 25-28, 2018.
13. Brown B\*, **Myers DJ**, Casteel C, Branch, C, and Rauscher KJ. Workplace Violence Among Young Workers: Exploring Differences in the Experiences of High School and College Students. *American Public Health Association (APHA), Annual Meeting*, Atlanta, GA. November, 2017.
14. **Myers, DJ**, Lessin, N, Frederick, J, Thompson, S, Brooks, S and Wright, MJ. "Characteristics of, and Barriers to Effective Hazard Identification and Control Programs in U.S. Metal and Non-Metal Mines." *American Public Health Association (APHA), Annual Meeting*, Denver, CO. October/November, 2016.
15. Bush D, Chang C, Rauscher KJ, and **Myers DJ**. "Health and Safety Training for New Construction Workers in Community Colleges." *American Public Health Association (APHA), Annual Meeting*, Denver, CO, October/November, 2016.
16. Cossman, JA, **Myers, DJ**, and Wolf, JK\*. An Exploration of Woodard's "American Nations" for Predicting Cause-Specific US Mortality. *Population Association of America*. Washington, DC. March/April, 2016.
17. **Myers, DJ**, Pilkerton, C\*, Cossman, JA and Wolf JK\*. "An Exploration of Woodard's Cultural Nations for Predicting Regional Mortality in the US." *Southern Demographic Association*. San Antonio, Texas. October, 2015.
18. **Myers, DJ**, Lipscomb, HJ, Epling, C, Hunt, D, Richardson, W and Dement, JM. "Surgical Team Stability and Risk of Percutaneous Blood and Body Fluid Exposures during Surgical Procedures." *National Occupational Injury Research Symposium (NOIRS)*. Kingwood, WV. May, 2015.
19. Fullen, M, Lundstrom, W, Rauscher, K and **Myers, DJ**. "West Virginia Logger Hazard Awareness and Injury Risk Perception". *National Occupational Injury Research Symposium (NOIRS)*. Kingwood, WV. May, 2015.
20. Rauscher, KJ, Miller, M and **Myers, DJ**. Young Worker Fatalities Involving Child Labor Violations: An analysis of 12 Years of data from the Census of Fatal Occupational Injuries. *National Occupational Injury Research Symposium (NOIRS)*. Kingwood, WV. May, 2015.
21. **Myers, DJ**, Dement, JM., Epling, C, Hunt, D, Lipscomb, HJ, Richardson, W, and Smith-Lovin, L. "Stability of Surgical Teams and Risk of Percutaneous Blood and Body Fluid Exposures". *American Public Health Association (APHA) Annual Meeting*. New Orleans, LA. November, 2014.

22. Rauscher KJ, Casteel C, Bush D and **Myers, DJ**. Factor's Associated with High School Teachers Adoption, Usage Level and Fidelity to the Youth@Work: Talking Safety Curriculum. *American Public Health Association (APHA), Annual Meeting*, New Orleans, LA. November, 2014.
23. Eddy, E\* and **Myers, DJ**. "Measuring the Rise and Institutional Support for the Concept of 'Safety Culture'". *American Public Health Association (APHA) Annual Meeting*. New Orleans, LA. November, 2014.
24. Rauscher, KJ and **Myers, DJ**. "Occupational Health Literacy and Risk of Work-Related Injury among Teen Workers". *American Public Health Association (APHA) Annual Meeting*. Washington, DC. November, 2011.
25. **Myers, DJ**, Schoenfisch, AL and Lipscomb, HJ. "Time as a Barrier to the Use of Patient Lift Equipment: More Complex than "Minutes to Complete the Task." *National Occupational Injury Research Symposium (NOIRS)*. Morgantown, WV. October, 2011.
26. Schoenfisch, AL, Lipscomb, HJ, **Myers, DJ**, Pompeii, LA, and Dement, JM. "Evaluating the effect of an intervention to prevent patient-handling injuries among hospital workers: Support for the collection of intermediate measures of intervention adoption and the integration of quantitative and qualitative methods." *National Occupational Injury Research Symposium (NOIRS)*. Morgantown, WV. October, 2011.
27. **Myers DJ** and Rauscher KJ. "Socioeconomic Disparities in Work-Related Injury Prevalence among Teens." *First National Conference on Eliminating Health and Safety Disparities at Work*. Chicago, IL. September, 2011.
28. **Myers, DJ**, Epling C, Dement JM, and Hunt D. Blood and body fluid exposures in Operating Rooms. *National Occupational Injury Research Symposium (NOIRS)*. Pittsburgh, PA. October, 2008.
29. Schoenfisch, AL, Pompeii LA, and **Myers DJ**. "Work organization factors associated with patient handling injuries among nurses and nurses' aides." *American Public Health Association (APHA) Annual Meeting*. Washington DC. November, 2007.
30. Rauscher, K and **Myers, DJ**. "Socioeconomic Disparities in Risk of Occupational Injuries among Adolescents." *American Public Health Association (APHA) Annual Meeting*. Boston, MA. November, 2006.

### Invited Presentations

#### International

1. Brock, T, **Myers, DJ**, and Darcey, D. "Cobalt Industry Occupational Exposure Survey." Cobalt Development Institute, Health Safety and Environment Meeting, Brussels, Belgium. March, 2011.

#### National

1. Kriebel, D, **Myers, DJ**, Hoppin, P, Jacobs, M and Clapp, R. "Taking Smoking Out of the Picture: Insights for Cancer Prevention." Cancer and the Environment Symposium Priorities for Research, Policy and Clinical Practice. Pittsburgh, PA. January, 29, 2019.
2. **Myers, DJ**, Lessin, N, Frederick, J, and Wright MJ. "Attitudes and Beliefs of Hourly Miners and Salaried Managers Regarding Safety and Health in U.S. Metal and Non-Metal Mines." *United Steelworkers Safety, Health and Environment Conference*. Pittsburgh, PA. March, 2018.

3. **Myers, DJ**, Lessin, N, Frederick, J, **McCormick, S,\*** and Wright MJ. "Results from A Study of Health and Safety Programs and Committees in Unionized Metal and Non-Metal Mines in the United States." National Conference on Worker Safety and Health. Linthicum Heights, MD. December, 2017.
4. **Myers, DJ**, and Whoolery, M. "Is Training Adequate for Responsible Persons?" Society for Mining, Metallurgy and Exploration/Pittsburgh Coal Mining Institute of America (SME/PCMIA) Annual Joint Meeting. Canonsburg, PA. October, 2017.
5. Bush D, Wermes A, Rauscher KJ, **Myers DJ**, and Chang C. "Safe Students, Safe Workers: Construction Safety Programs in Post-Secondary Career Technical Education." *National Center for Construction Research and Training (CPWR) Webinar*. 2017.
6. Bush D, Rauscher, KJ, Chang C, and **Myers DJ**. "OSH Education in Post-Secondary Career Technical Education Construction Programs." *r2p in Construction: From Research to Practice – The Impact*. National Center for Construction Research and Training (CPWR). Cincinnati, OH. 2017.
7. Bush D, Rauscher, KJ, Chang C, and **Myers DJ**. "Safe Students, Safe Workers: Tools and Resources for Construction Programs." *Skills USA National Leadership and Skills Conference*. Louisville, KY. 2017
8. **Myers, DJ**, Lessin, N, Frederick, J, Thompson, S, Brooks, S and Wright, MJ. "Characteristics of, and Barriers to Effective Hazard Identification and Control Programs in U.S. Metal and Non-Metal Mines." *United Steelworkers Safety, Health and Environment Conference*, Pittsburgh, PA. September, 2016.
9. Rauscher KJ, Miller, M and **Myers, DJ**. "Young Worker Fatalities: An Investigation of Cases Involving Child Labor Violations." *Southeastern States Occupational Network (SouthON)*. Lexington, KY. 2015.
10. **Myers, DJ**. "Culture: Safety, Organizational, and Occupational". University of Iowa, College of Public Health, Occupational and Environmental Health Seminar Series. Iowa City, IA. April, 2014.
11. **Myers, DJ**. "Culture: Safety, Organizational, and Occupational". University of Iowa, College of Public Health, Guest Lecture in EPI 610 Occupational Epidemiology. Iowa City, IA. April, 2014.
12. Pompeii, LA, Dement, JM, Lipscomb, HJ, **Myers, DJ**, Schoenfisch, AL, Ostbye T, Jackson, G, Epling, C, Hunt, D, and Thomann, W. "The Advantages of Combining Workers' Compensation Data with Other Employee Databases for Surveillance of Occupational Injuries and Illnesses in Hospital Workers". Use of Workers' Compensation Data for Occupational Safety and Health Washington, DC. June, 2012.
13. **Myers, DJ**, Schoenfisch, AL and Lipscomb, HJ. "Cultural Influences on Workplace Safety: What We Have Learned from Healthcare." Carolina Collaborative for Research on Work and Health. University of North Carolina, Chapel Hill, NC. February, 2012.
14. Lipscomb, HJ, **Myers, DJ**, and Schoenfisch, AL. "Effectiveness of Lift Equipment in the Prevention of Patient-handling Injuries: What Did We Learn at Duke and Durham Regional Hospitals?" 5th Annual Minimal-Manual Lift Environment (MMLE) Coaches' Conference. Durham, NC, May, 2011.
15. Silberberg, M, Weaver, S, **Myers, DJ**, Schneider, S, McDonald, M and Gregory, B. "Using Social Networking Analysis to Understand Relationships among Campus and Community Partners." CTSA Community Engagement and Social Network Analysis Workshop. Sacramento, CA. September, 2010.
16. **Myers, DJ**, Dement, JM, Ringen, K, and Welch, L. "Prevalence and Health Care Costs for Diabetes and Hypertension among Boilermakers and Their Dependents." National Coordinating Committee for Multiemployer Plans (NCCMP) United Against Diabetes and Cardiovascular Disease (UAD/CVD). Washington, DC. July, 2009.

17. **Myers, DJ.** "Shift Work Patterns and Risk of Acute Injury." Pilot Projects Research Forum. University of Illinois at Chicago School of Public Health, Chicago, IL. April, 2008.
18. **Myers, DJ.** "Informal Social Status and Risk of Injury and Assault among Healthcare Workers." Duke University Sociology Department Colloquium. Duke University, Durham, NC. February, 2008.
19. Rauscher, K and **Myers, DJ.** "Socioeconomic Disparities in Risk of Occupational Injuries among Adolescents." University of Massachusetts Work Environment Department Research Seminar. February, 2006.
20. **Myers, DJ.** "Healthcare Workers: Injuries, Assault and Social Networks." Harvard Injury Control Research Center Seminar Series. Harvard University, Boston, MA. September, 2004.
21. **Myers, DJ.** "The Role of Social Networks in Workplace Injuries." University of Massachusetts & University of Connecticut Joint Research Symposium. Sturbridge, MA. January, 2004.

#### **Regional**

1. Fullen, M, **Myers, D,** Rauscher, K, Lundstrom, W, Takacs, B, Donnelly, P, Lundstrom, E\*. "Timber Safe-Reduction of West Virginia Logging Hazards." WVU Extension Service Annual Conference Program Poster Session. Weston, WV. September 25, 2019.
2. Fullen, M, **Myers, D,** Rauscher, K, Lundstrom, W, Takacs, B, Lundstrom, E\*. "Hazards Perceptions in the Logging Industry: Differences between Owners and Workers." WVU Extension Service Annual Conference Research Poster Session. Weston, WV. September 23, 2019.

**RESEARCH GRANTS****Ongoing****Role:** Co-Investigator**Title:** Evaluation and Improvement of the OSHA 10-Hour Construction Safety Training Program. (Fullen and Rauscher K, PIs).**Objectives:** The objectives of this sub-project within the CPWR Research Core are to improve OSHA 10-hour construction safety training outcomes by modifying the current training approach based on new evidence generated by a large-scale study of OSHA Training Institute Education Center (OTIEC) authorized trainers and their trainees. Our goal is to see the widespread adoption of a new evidence-based training approach by authorized trainers participating in the OSHA Outreach Training Program to better prepare trainees for safe work in construction.**Funder:** CDC/National Institute for Occupational Safety and Health (NIOSH)**Program:** National Center for Construction Safety and Health Research and Translation**Applicant Center:** National Center for Construction Research and Training (CPWR) (Cain C, PI)**Period:** 9/30/19 – 9/29/24**Budget:** \$994,996**Role:** **Co-Principal Investigator****Title:** Timber-Safe - Reduction of WV Logging Hazards (Fullen & Myers, PIs)**Funder:** NIOSH/University of Kentucky Southeast Center for Agricultural Health and Injury Prevention**Budget:** \$859,424**Period:** September 30, 2016 – September 29, 2021**Completed****Role:** **Co-Principal Investigator****Title:** An In-Depth Exploration of Hospital-Based Physical and Occupational Therapists' Needs, Perceptions and Involvement Regarding Safe Patient Handling and Mobility Programs (Evans & Myers, PIs)**Funder:** NIOSH/The Johns Hopkins University Occupational Health Education and Research Center**Budget:** \$6,000**Period:** January 1, 2019 – June 30, 2019 (NCE through January, 2020)**Role:** **Co-Investigator****Title:** Understanding Workplace Violence among Young Workers in the US (Rauscher & Casteel, PIs)**Funder:** CDC/National Institute for Occupational Safety and Health (NIOSH)**Budget:** \$1,277,900**Period:** September 2015 – September 2018 (NCE through September 2019)**Role:** **Co-Investigator****Title:** Use of Tele-Exercise as an Alternative Delivery Channel for Translating an Evidence-Based Fall-Prevention Program into Practice for Older Adults in West Virginia (Jones, PI, Research Project; Bossarte, PD, Center Grant)**Funder:** CDC National Center for Injury Prevention and Control**Budget:** \$330,000 (\$261,904 direct costs)**Period:** August 1, 2017-July 31, 2019

**Role: Consortium Principal Investigator****Title:** Characteristics of and Barriers to Effective Hazard Identification and Control Programs in US Metal and Nonmetal Mines (Wright, PI)**Funder:** Alpha Foundation for the Improvement of Mine Safety and Health, Inc.

(This Foundation was established as part of a Non-Prosecution Agreement entered into in Dec. 2011 by the US Attorney's Office for the Southern District of West Virginia, the US Department of Justice, Alpha Natural Resources, Inc. and Alpha Appalachia Holdings, Inc., in relation to the explosion at Massey Energy's Upper Big Branch Mine). *This is a peer-reviewed competitive research grant.*

**Budget:** \$600,000**Period:** November 2013 – October 2015 (NCE through February 2018)**Grant Number:** AFC113-5**Role:** Co-Investigator**Title:** Occupational Safety and Health Education in Post-secondary Career Technical Education Construction Programs (Rauscher & Bush, PIs)**Funder:** CDC/National Institute for Occupational Safety and Health**Budget:** \$600,000**Period:** September 2014 – August 2017**Role: Co-Principal Investigator****Title:** Effective MERD Training - Design, Implementation, Retention and Evaluation (Myers & Whoolery, PIs)**Funder:** Alpha Foundation for the Improvement of Mine Safety and Health, Inc.

(This Foundation was established as part of a Non-Prosecution Agreement entered into in Dec. 2011 by the US Attorney's Office for the Southern District of West Virginia, the US Department of Justice, Alpha Natural Resources, Inc. and Alpha Appalachia Holdings, Inc., in relation to the explosion at Massey Energy's Upper Big Branch Mine). *This is a peer-reviewed competitive research grant.*

**Budget:** \$647,425**Period:** August 2015 – July 2017**Grant Number:** AFC215-25**Role:** Co-Investigator**Title:** West Virginia Logger Hazard Awareness and Injury Risk Perception (Fullen, PI)**Funder:** Southeast Center for Agricultural Health and Injury Prevention**Budget:** \$14,998**Period:** October 2013 – September 2014**Role: Principal Investigator****Title:** K01-Preventing Blood and Body Fluid Exposures during Surgical Procedures (Myers, PI)**Funder:** CDC/National Institute for Occupational Safety and Health**Budget:** \$297,019**Period:** September 2009 – August 2014 (includes no cost extension)**Role:** Co-Investigator**Title:** Evaluation of the West Virginia Health Insurance Marketplace (Bias, PI)**Funder:** DHHS/West Virginia Offices of the Insurance Commissioner**Budget:** \$2,100,000**Period:** March 2013 – February 2018 (role ended in 2014)

**Role: Principal Investigator****Title:** Shift Rotation and Risk of Acute Injuries among Healthcare Workers (Myers, PI)**Funder:** CDC/NIOSH-funded Pilot Project Research Training Program. University of Illinois Occupational and Environmental Health and Safety Education and Research Center (Illinois ERC).**Budget:** \$5,049**Period:** July 2006 – June 2007**Role: Co-Principal Investigator****Title:** Occupational Health Literacy, Socioeconomic Status & Work-related Injury to Teens (Rauscher & Myers, PIs)**Funder:** CDC/National Institute for Occupational Safety and Health**Budget:** \$151,999**Period:** July 2009 – August 2012 (includes no cost extension)**Role: Co-Investigator (Doctoral Dissertation R03 Award):****Title:** The Role of Social Networks in Workplace Injuries (Kriebel, PI)**Funder:** CDC/National Institute for Occupational Safety and Health**Budget:** \$76,313**Period:** September 2000 – December 2002**Role: Epidemiologist****Title:** Department of Energy's National Building Trades Medical Screening Program (Dement, PI)**Funder:** Center to Protect Workers' Rights and the US Department of Energy**Period:** December 2005 – January 2010**Role: Epidemiologist****Title:** United Against Diabetes & Cardiovascular Disease (Dement, PI)**Funder:** National Coordinating Committee Multiemployer Plans.**Period:** May 2007 – September 2009**Role: Epidemiologist****Title:** Construction Injuries Treated in US Emergency Departments Based on Analyses of NEISS Work (Lipscomb, PI)**Funder:** CDC/National Institute for Occupational Safety and Health. Division of Safety Research Occupational Health/Surveillance Branch c**Period:** December 2006 – May 2009**Role: Epidemiologist****Title:** Effectiveness of Lift Equipment in Preventing Patient Handling Injuries (Lipscomb, PI)**Funder:** CDC/National Institute for Occupational Safety and Health**Period:** September 2005 – August 2009

**Role:** Epidemiologist  
**Title:** Chrysotile: New Exposure Indices & Cancer Epidemiology (Dement, PI)  
**Funder:** CDC/National Institute for Occupational Safety and Health  
**Period:** September 2003 – September 2008



**SERVICE & LEADERSHIP****Boise State University**

- 2020 – present      PhD Program Director. Community and Environmental Health Department. Boise State University.
- 2022 – present      Faculty Affairs Committee/Promotions and Tenure Department Committee – Chair
- 2020 – 2021          Faculty Affairs Committee/Promotions and Tenure Department Committee – Chair
- 2020 – present      Curriculum Committee – Co-chair
- 2019 – present      Doctoral Research Core Coordinator. Community and Environmental Health Department. School of Allied Health Science. Boise State University.
- 2019 – present      Member. Graduate Education Committee. Community and Environmental Health Department. School of Allied Health Science. Boise State University.

**West Virginia University**

- 2018 – 2019          WVU School of Public Health Scholar in Residence at the National Institute for Occupational Safety and Health. School of Public Health. West Virginia University. Morgantown, WV and NIOSH, Morgantown, WV.
- 2018 – 2019          Member. Curriculum Committee.
- 2016 – 2019          Volunteer instructor. Intermediate Tai Chi. WVU Osher Lifelong Learning Institute (OLLI).
- 2015 – 2019          Volunteer instructor. Introduction to Tai Chi. WVU Osher Lifelong Learning Institute (OLLI).
- 2015 – 2019          Co-Chair. Research Sub-committee. Robert C. Byrd Health Sciences Center Vice President's Wellbeing and Mindfulness Task Force.
- 2016 – 2018          Member. Promotions and Tenure Committee Taskforce.
- 2016 – 2018          Member. Promotions and Tenure Committee.
- 2016 – 2018          Member. School of Public Health Bylaws Committee.
- 2016 – 2018          Member. Department of Occupational and Environmental Health Sciences Chair Search Committee. School of Public Health.
- 2017                    WVU SPH SOPHAS Virtual Fair Representative. July 11, September 19 and November 16.
- 2016 – 2016          Member. Academic Affairs Committee. School of Public Health.
- 2015 – 2015          Member. OEHS Occupational Residency Director Search Committee. School of Public Health.
- 2015 – 2016          Member. PhD Planning Committee. Department of Occupational and Environmental Health Sciences. School of Public Health.

- 2015 – 2016 Member. Injury Control Research Center Director Search Committee. Schools of Public Health and Medicine.
- 2014 – 2016 PhD Program Director. Department of Occupational and Environmental Health Sciences. School of Public Health.
- 2014 – 2016 Executive Board Member. Research Center on Violence. Department of Sociology and Anthropology. Eberly College of Arts and Sciences.
- 2014 – 2014 Co-chair. Appalachian Health Institute Founding Committee.
- 2013 – 2016 Faculty Representative (elected). Dean’s Council. School of Public Health.
- 2013 – 2015 Co-Founder. Social Theory and Public Health Journal Club. School of Public Health.
- 2012 – 2013 Member. Information Technology Committee. School of Public Health.
- 2012 – 2013 Member. Master of Public Health Competencies Committee. School of Public Health.
- 2012 – 2014 Member. Graduate Assistantship Committee. School of Public Health.

**Duke University**

- 2009 – 2015 Advisor. Social Network Analysis and Survey Design. Durham Health Initiative. Department of Community and Family Health.
- 2006 – 2012 Member. Research Committee. Department of Community and Family Medicine. School of Medicine.

**Service to the Field**

***Expert Panel***

- 2010 – 2014 Epidemiologist. Camp Lejeune Health Survey. Expert Panel. United States Department of Defense.

***Session Moderator***

- 2018 Session Moderator. National Occupational Injury Research Symposium. Morgantown, WV 2018.
- 2016 Session Moderator. Occupational Health Section. *Putting the Work into Total Worker Health - OHS Full Session*. American Public Health Association Annual Meeting. Denver, CO.
- 2006 Session Moderator. Occupational Health Section. American Public Health Association Annual Meeting. Boston, MA.

***Grant Reviewer***

2016	Arthritis Research UK. Southampton, United Kingdom (reviewed renewal of 2011 award).
2011	Centers of Excellence to Promote a Healthier Workforce Special Emphasis Panel. National Institute for Occupational Safety and Health.
2011	Arthritis Research UK. Southampton, United Kingdom.
2009	Agency for Toxic Substances and Disease Registry. Special Emphasis Panel. National Institute for Occupational Safety and Health.

***Abstract Reviewer***

2021	American Public Health Association
2018	National Occupational Injury Research Symposium (NOIRS)

***External Technical Reviewer***

2017 – 2019 National Institute for Occupational Safety and Health

***Editorial Board:***

Journal of Multidisciplinary Healthcare

Journal of School Health

***Manuscript Reviewer:***

- Accident Analysis and Prevention
- American J of Industrial Medicine
- American J of Infection Control
- American J of Public Health
- Archives of Occ and Environmental Health
- BMC Nursing
- BMC Public Health
- Economic and Industrial Democracy
- Injury Prevention
- International J of Nursing Studies
- International J of Env Res and Public Health
- J of Applied Gerontology
- J of Health Disparities Research and Practice
- JAMA
- J of Epidemiology and Community Health
- J of Epidemiology and Global Health
- J of Safety Research
- J of School Health
- New Solutions
- Occupational and Environmental Medicine
- Population Research and Policy Review
- Safety Science
- Sage Open
- Social Science and Medicine
- Social Science and Medicine – Population Health

## TEACHING/MENTORING

### Courses

2021 – present	HLTH 480 Epidemiology (sole instructor)
2021 – present	MHS 540 Advanced Statistics in Public Health (sole instructor)
2020 – present	MHS 520 Advanced Systems Analysis and Problem-Solving (sole instructor)
2020 – present	MHS 521 Building and Sustaining Systems Capacity (sole instructor)
2019 – present	MHS 504 Applied Epidemiology (sole instructor)
2019 – 2019	PUBH 620 Public Health Capacity Building (sole instructor)
2017 – 2019	PUBH 442 Public Health in the Workplace (sole instructor)
2014 – 2019	OEHS 733 Organizational Theories for Injury and Disaster Prevention (sole instructor)
2014 – 2019	EPID 769 Occupational Epidemiology (sole instructor)
2013 – 2013	OEHS 665 Worksite Evaluation (co-instructor)

### PhD Dissertation Committees

2016 – 2021	Kimeran Evans. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Role: Committee Chair.
2017 – 2019	Brandy Brown. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Role: Committee Member.
2017 – 2019	Maya Nye. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Role: Committee Chair.
2016 – 2018	Wilson Koech. Department of Epidemiology. School of Public Health. West Virginia University. Role: Committee Member.
2015 – 2018	Lauren Branch. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Role: Committee Member.
2015 – 2018	Alyson Johnson. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University. Role: Committee Member.
2015 – 2016	Sherry Owens. Department of Social and Behavioral Health Sciences. School of Public Health. West Virginia University. Role: Committee Member.

**Master's Thesis Committees**

2019 – 2020 Rachel Phinney. Community and Environmental Health Department. School of Allied Health Sciences. Boise State University.  
Role: Committee Member.

2016 – 2017 Julia Wolf. Department of Sociology and Anthropology. Eberly College of Arts and Sciences. West Virginia University.  
Role: Committee Member.

**Supervised Research Rotations**

2017 Maya Nye, Doctoral Student. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.  
Rotation Topic: Mine Safety.

2017 Kimeran Evans, Doctoral Student. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.  
Rotation Topic: Safety Culture.

2016 Brandy Brown, Doctoral Student. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.  
Rotation Topic: Work-related injuries among West Virginia's young workers.

2014 Sara Surber, Doctoral Student. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.  
Rotation Topic: Workplace interventions and non-reporting of Work-related Injuries.

2009 – 2010 Kirill Shislov, Third year medical student. Department of Occupational and Environmental Epidemiology. Duke University School of Medicine.  
Rotation Learning Foci: Conceptual frameworks, data analysis, STATA statistical software.

**Advisees/Graduate Research Assistants**

2019 – 2019 Mohini Chatterji, *Practice Based Experience Mentee*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

2019 – 2019 Eric Lundstrom, *Practice Based Experience Mentee*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

2017 – 2018 Seth McCormick, MPH student. *Graduate Research Assistant*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

2015 – 2016 Alexandra Dzomba, MPH student. *Advisee*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

2014 – 2016 Salvador Conti, MPH student. *Advisee*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

2013 – 2015 Joseph Klass, MPH student. *Advisee*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

2013 – 2014 Emily Eddy, MPH student. *Advisee and Graduate Research Assistant*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

2012 – 2014 Rami Katrib, MPH student. *Advisee*. Department of Occupational and Environmental Health Sciences. School of Public Health. West Virginia University.

**Additional Advising Roles**

2017 – 2018 Dr. Emma Tsui, PhD. Assistant Professor, Graduate School of Public Health and Health Policy, CUNY. K01 Applicant Advisor.

**CYNTHIA LEIGH CURL**

Department of Public Health and Population Science  
Boise State University  
1910 University Drive  
Boise ID 83725-1835

(208) 426-3924 (office)  
(208) 426-3923 (lab)  
cynthiacurl@boisestate.edu

**EDUCATION**

**University of Washington** June 2014  
*PhD, Environmental and Occupational Health Sciences*  
Dissertation: "Characterizing dietary exposure to organophosphate pesticides for use in epidemiologic research"  
Major Field: Exposure Assessment; Minor Field: Environmental Epidemiology

**University of Washington** August 2000  
*MS, Environmental and Occupational Health Sciences*  
Thesis: "Evaluation of organophosphate pesticide exposure in children of agricultural families"  
Major Field: Biological and Environmental Monitoring; Minor Field: Agricultural Health and Safety

**Swarthmore College** June 1998  
*BA, Chemistry*

**PROFESSIONAL POSITIONS**

**Associate Professor** July 2020 – Present  
School of Public and Population Health (formerly CEH)  
Boise State University, Boise, ID

**Assistant Professor** January 2015 – July 2020  
Department of Community and Environmental Health (CEH)  
Boise State University, Boise, ID

**Program Manager** December 2006 - December 2014  
MESA Air Study  
University of Washington, Seattle, WA

**Senior Scientist** July 2004 – November 2006  
Integral Consulting  
Seattle, WA & Denver, CO

**Research Scientist** April 2003 – April 2004  
Environment and Human Health, Inc.  
North Haven, CT

**Research Scientist** September 2000 – March 2003  
Pacific Northwest Agricultural Safety and Health (PNASH) Center  
University of Washington, Seattle, WA

**HONORS AND AWARDS**

2020 Boise State Graduate College Excellence in Graduate Mentoring Award (Honorable Mention)

2019 Rising Star Award for the 2020 Gordon Research Conference on Environmental Endocrine Disruptors

2018 Science Communication Fellowship from Advancing Green Chemistry

2017 20 Pioneers Under 40 in Environmental Public Health by the Collaborative on Health & Environment

2017 Best Paper of 2016 by the International Society of Environmental Epidemiology

2017 Boise State University Golden Apple Award for Excellence in Teaching (Honorable Mention)

2017 ASSERT Fellow in the Center for Transformative Research at Boise State University

2016-17 OSHER Institute for Lifelong Learning Faculty Research Award

2015-17 Institute for Translational Health Sciences Rising Stars Career Development Award

2013-14 Magnuson Scholarship (Top Student in the University of Washington's School of Public Health)

2010-13 EPA Science to Achieve Results (STAR) Graduate Fellowship

**FUNDING HISTORY****Current Funding:**

Pacific Northwest Agricultural Safety and Health (PNASH) Pilot Program (Hyland). 10/21-9/22

University of Washington. Total Costs: \$49,475

*Pesticide Exposures and Risk Perceptions among Male and Female Latinx Farmworkers in Idaho*

This pilot project aims to understand whether pesticide exposure levels, risk perceptions, and protective behaviors differ by gender among Idaho farmworkers.

**Role: Key Personnel; Mentor** (Dr. Hyland is a post-doctoral fellow with my group)

1 K01 ES028745-01A1 (Curl). 9/18-8/22

National Institutes of Health (NIH). Total Costs: \$457,537

*Measurement of Agricultural and Dietary Glyphosate Exposure among Pregnant Women*

This career development award includes a research project to measure glyphosate exposure among pregnant women and a training plan to transition Dr. Curl from a junior faculty mentor to a fully independent investigator.

**Role: Principal Investigator**

**Completed Funding:**

Regional Alliance of INBRE Networks (RAIN) Collaborative Research Project (Curl, Johnson, Moyce). 5/20-4/21

IDeA Network of Biomedical Research (INBRE). Direct Costs: \$60,000

*NHANES Evaluation Pertaining to High-Risk Renal-Function Organophosphate and Nutritional Components*

This project aims to evaluate the relationship between urinary levels of pesticide biomarkers, water intake, physical activity and macronutrient intake with reduced estimated glomerular filtration rate in a national sample.

**Role: Co-Principal Investigator**

Pacific Northwest Agricultural Safety and Health (PNASH) Pilot Program (Curl). 10/17-9/19

University of Washington. Total Costs: \$30,250

*Recognizing and Reducing Safety Hazards in Northwest Potato Production*

The purpose of this project is to assess workplace hazards in potato production and to assist growers in identifying and controlling these hazards.

**Role: Principal Investigator**

2018 Health Disparities Pilot Grant Program. (Curl) 8/18-6/19

Mountain West IDeA Clinical & Translational Research–Infrastructure Network (CTR-IN). Total Costs: \$59,970

*Assessment of Risk Factors for Health Disparities among Latina Farm Workers*

This pilot project is an interdisciplinary approach to assess risk factors for poor health among Latina farm workers in Idaho, including pesticide exposure and occupational hazards as well as social and cultural factors.

**Role: Principal Investigator**

GD\_ID\_0487 (Curl). 5/16-4/19

United States Department of Agriculture. Total Costs: \$654,843

*Bromide Uptake in Crops Following Soil Fumigation with Methyl Bromide for PCN Eradication*

This project investigates the potential for bromide uptake in crops subsequent to methyl bromide fumigation treatment to prevent unacceptable dietary exposures to livestock and humans.

**Role: Principal Investigator**

RS0215 (Curl). 6/15-5/17.

University of Washington Institute for Translational Health Sciences. Total Costs: \$15,000

*Effect of an Organic Diet Intervention on Exposure to Agricultural Pesticides among Pregnant Women*

This pilot study investigates the effect of a randomized, blinded six-month organic diet intervention on exposure to agricultural pesticides among a cohort of 20 pregnant women.

**Role: Principal Investigator**

Cooperative Agreements 6979 & 6995 (Curl). 10/15-4/16.

Idaho State Department of Agriculture. Total Costs: \$21,631

*Methyl Bromide Literature Review & Sampling Plan.*

These projects resulted in a literature review related to inorganic bromide uptake in plants following soil fumigation with methyl bromide, and a spatial sampling plan for alfalfa and soil in previously fumigated fields.

**Role: Principal Investigator**



193L101035 (Curl). 9/15-5/17

OSHER Institute for Lifelong Learning. Total Costs: \$5,000

*Measuring in utero Pesticide Exposures among Newborns following a Maternal Diet Intervention*

This project aims to understand the effect of a maternal organic diet during pregnancy on biological markers of pesticide exposure in newborns.

**Role: Principal Investigator**

PNASH Pilot Grant (Curl). 7/15 - 9/15.

Pacific Northwest Safety and Health Center. Total Costs: \$7,000

*Developing Connections with Idaho's Agricultural Industry.*

These pilot funds were intended to expand the PNASH network of agricultural stakeholders into Idaho.

**Role: Principal Investigator**

#### **Student Grants:**

Higher Education Research Council (HERC) Fellowship (Romero). 1/20 – 5/20

Institute for STEM and Diversity Initiatives. Total costs: \$3,400

*HERC Fellowship*

This Fellowship award provides research opportunities to foster undergraduate education.

**Role: Mentor**

PTOP Grant (Phinney). 2/19 – 6/19

Professional Training Opportunities Program (PTOP) in Occupational Health and Safety. Total Costs: \$5,860

*Characterizing and Communicating Lessons Learned from Agricultural Pesticide Misuse*

This training award is intended to support a student/staff member in gaining experience in occupational health sciences and specifically to evaluate the potential for partnership with the Idaho State Department of Agriculture to utilize data regarding Worker Protection Standard to improve worker safety.

**Role: Mentor**

PTOP Grant (Porter). 2/17-10/17

Professional Training Opportunities Program (PTOP) in Occupational Health and Safety. Total Costs: \$5,619

*Job Hazard Analysis in Agriculture: Developing Tools to Evaluate the Effect of Alternative Production Systems on Worker Health*

This training award is intended to support a student/staff member in gaining experience in occupational health sciences and specifically to evaluate the potential for differential hazards for workers on organic and conventional farms.

**Role: Mentor**

Higher Education Research Council (HERC) Fellowship (Penwell). 9/16-12/16

Institute for STEM and Diversity Initiatives. Total Costs: \$3,400

*HERC Fellowship*

This Fellowship award provides research opportunities to foster undergraduate education.

**Role: Mentor**

#### **BIBLIOGRAPHY**

##### **PEER-REVIEWED PUBLICATIONS (Mentees indicated with an \*)**

- 1) Liu B, **Curl CL**, Branstsaeter AL, Torjusen H, Sun Y, Du Y, Lehmler HJ, Balentine A, Snetselaar LG, Bao W. Organic food consumption during pregnancy and the potential effects on maternal and offspring health: A review. *Advances in Nutrition*. 2022. [Under Review].
- 2) Hyland C\*, McConnell K, DeYoung E, **Curl CL**. Evaluating the accuracy of satellite-based methods to estimate residential proximity to agricultural crops. *Journal of Exposure Science and Environmental Epidemiology*. August 2022. <https://doi.org/10.1038/s41370-022-00467-0>.
- 3) Som Castellano R, Meierotto L, **Curl CL**. Under the shadow of structural violence: Work and family dynamics for Latina farmworkers in Southwestern Idaho. *Journal of Agriculture, Food Systems and Community Development*. 2022; 11(3). <https://doi.org/10.5304/jafscd.2022.113.002>.

- 4) **Curl CL**, Meierotto L, Som Castellano RL, Spivak MR, Kannan K. Measurement of urinary pesticide biomarkers among Latina farmworkers in southwestern Idaho. *Journal of Exposure Science and Environmental Epidemiology*. Jan 2021; doi.org/10.1038/s41370-020-00285-2.
- 5) **Curl CL**, Meierotto L, Som Castellano RL (shared first authorship). Understanding challenges to well-being among Latina farmworkers using an interdisciplinary, mixed-methods approach. *The Journal of Environmental Research and Public Health*. 2021; 18(1): 169.
- 6) Hyland C, Kogut K, Gunier RB, Castorina R, **Curl CL**, Eskenazi B, Bradman A. Organophosphate pesticide dose estimation from spot and 24-hr urine samples collected from children in an agricultural community. *Environment International*. Jan 2021; 146.
- 7) Meierotto L, Som Castellano R, **Curl CL**. Isolation and fear of deportation: Intersectional barriers to well-being among Latina Farmworkers in southwestern Idaho. *Culture, Agriculture, Food and Environment*. Dec 2020; 4(22).
- 8) **Curl CL**, Adams K, Phinney R, Blua M. Grower perceptions of safety hazards and associated injuries among farmworkers involved in Northwest potato production. *Journal of Agromedicine*. 2020; Jun 9:1-11.
- 9) **Curl CL**, Spivak M, Phinney R. Synthetic pesticides and health in vulnerable populations: agricultural workers. *Current Environmental Health Reports*. 2020; 7:13-29.
- 10) **Curl CL**, Porter J, Penwell I, Phinney R, Ospina M, Calafat A. Effect of a 24-week randomized trial of an organic produce intervention on pyrethroid and organophosphate pesticide exposure among pregnant women. *Environment International*. 2019. Nov;132:104957. **\*Selected as NIEHS Extramural Paper of the Month and nominated for the Charles C. Shepard Science Award.**
- 11) Kaufman JD, **Curl CL**. Environmental health sciences in a translational research framework: More than benches and bedsides. *Environmental Health Perspectives*. 2019; 127(4):45001.
- 12) Miller KA, Spalt EW, Gasset AJ, **Curl CL**, Larson TV, Avol E, Allen RW, Vedal S, Szpiro AA, Kaufman JD. Estimating ambient-origin PM<sub>2.5</sub> exposure for epidemiology: Observations, prediction and validation using personal sampling in the Multi-Ethnic Study of Atherosclerosis. *Journal of Exposure Science and Environmental Epidemiology*. 2019; 29(2):227-237.
- 13) Hazlehurst MF, Spalt EW, Nicholas TP, **Curl CL**, Davey ME, Burke GL, Watson KE, Vedal S, Kaufman JD. Contribution of the in-vehicle microenvironment to individual ambient-source nitrogen dioxide exposure: the Multi-Ethnic Study of Atherosclerosis and Air Pollution. *Journal of Exposure Science and Environmental Epidemiology*. 2018; 28(4):371-80.
- 14) Sadegh M, Pierce J, AghaKouchak A, Glenn NF, **Curl CL**. Will clean air fade away? *Eos Earth & Space Science News*. 2018; 99; doi.org/10.1029/2018EO090735.
- 15) Hazlehurst MF, Spalt EW, **Curl CL**, Davey ME, Vedal S, Burke GL, Kaufman JD. Integrating data from multiple time-location measurement methods for use in exposure assessment: the Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). *Journal of Exposure Science and Environmental Epidemiology*. 2017; 27(6):569-574.
- 16) Kaufman JD, Spalt EW, **Curl CL**, Hajat A, Jones MR, Kim SY, Vedal S, Szpiro AA, Gasset A, Sheppard L, Daviglius ML, Adar S. Advances in understanding air pollution and cardiovascular diseases: The Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). *Global Heart*. 2016; 11(3):343-352.
- 17) Kaufman JD, Adar SD, Barr RG, Budoff M, Burke G, **Curl CL**, Daviglius ML, Diez Roux AV, Gasset AJ, Jacobs DR, Kronmal R, Larson TV, Navas-Acien A, Olives C, Sampson PD, Sheppard L, Siscovick DS, Stein JH, Szpiro AA, Watson KE. Association between air pollution and coronary artery calcification within six metropolitan areas in the USA (the Multi-Ethnic Study of Atherosclerosis and Air Pollution): a longitudinal cohort study. *Lancet*. 2016; 388(10045): 696-704. **\*Selected by the International Society of Environmental Epidemiology as the Best Environmental Epidemiology Paper of 2016**

- 18) Weuve J, Kaufman JD, Szpiro AA, **Curl CL**, Puett R, Beck T, Evans D, Mendes de Leon CF. Exposure to traffic-related air pollution in relation to progression in disability. *Environ Health Perspect*. 2016; 124(7):1000-1008.
- 19) Spalt EW, **Curl CL**, Allen RQ, Cohen M, Adar SD, Stukovsky KH, Avol E, Castro-Diehl C, Nunn C, Mancera-Cuevas K, Kaufman JD. Time-location patterns of a diverse population of older adults: the Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). *J Expo Sci Environ Epidemiol*. 2016; 26(4):349-355.
- 20) Spalt EW, **Curl CL**, Allen RW, Cohen M, Williams K, Hirsch JA, Adar SD, Kaufman JD. Factors influencing time-location patterns and their impact on estimates of exposure: the Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). *J Expo Sci Environ Epidemiol*. 2016; 26(4):349-355.
- 21) **Curl CL**, Beresford SA, Fenske RA, Nettleton JA, Kaufman JD. Estimating pesticide exposure from dietary intake and organic food choices in The Multi-Ethnic Study of Atherosclerosis (MESA). *Environ Health Perspect*. 2015; 123(5):475-83. **\*Chosen as a "Science Selection" for the issue.**
- 22) Leary PJ, Kaufman JD, Barr RG, Bluemke DA, **Curl CL**, Hough CL, Lima JA, Szpiro AA, Van Hee VC, Kawut SM. Traffic related air pollution and the right ventricle: The Multi-Ethnic Study of Atherosclerosis. *Am J Respir Crit Care Med*. 2014; 189(9):1092-1100.
- 23) **Curl CL**, Beresford SA, Hajat A, Kaufman JD, Moore K, Nettleton JA, Diez-Roux AV. Associations of organic produce consumption with socioeconomic status and the local food environment: Multi-Ethnic Study of Atherosclerosis (MESA). *PLoS One*. 2013; Jul 31;8(7):e69778.
- 24) Kaufman JD, Adar S, Allen R, Barr RG, Budoff M, Burke G, Casillas A, Cohen M, **Curl CL**, Daviglius M, Diez Roux A, Jacobs D, Kronmal R, Larson T, Liu SLJ, Lumley T, Navas-Acien A, O'Leary D, Rotter JI, Sampson P, Sheppard L, Siscovick D, Stein J, Szpiro A, Tracy R. Prospective study of particulate air pollution exposures, subclinical atherosclerosis, and clinical cardiovascular disease. The Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). *Am J Epidemiol*. 2012; 176(9):825-37.
- 25) Allen RW, Adar SD, Avol E, Cohen M, **Curl CL**, Larson T, Liu LJ, Sheppard L, Kaufman JD. Modeling the residential infiltration of outdoor PM<sub>2.5</sub> in the Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). *Environ Health Perspect*. 2012; 120(6):824-30.
- 26) Gill EA, **Curl CL**, Adar SD, Allen RW, Auchincloss AH, O'Neill MS, Park SK, Van Hee VC, Diez Roux AV, Kaufman JD. Air pollution and cardiovascular disease in the Multi-Ethnic Study of Atherosclerosis. *Prog Cardiovas Dis*. 2011; 53(3):353-60.
- 27) Griffith W, **Curl CL**, Fenske RA, Lu CA, Vigoren EM, Faustman EM. Organophosphate pesticide metabolite levels in pre-school children in an agricultural community: within- and between-child variability in a longitudinal study. *Environ Res*. 2011; 111(6):751-6.
- 28) Cohen MA, Adar SD, Allen RW, Avol E, **Curl CL**, Gould T, Hardie D, Ho A, Kinney P, Larson TV, Sampson P, Sheppard L, Stukovsky KD, Swan SS, Liu LJ, Kaufman JD. Approach to measuring participant pollutant exposures in the Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). *Environ Sci Technol*. 2009; 43(13): 4687-93.
- 29) Fenske RA, Lu C, **Curl CL**, Shirai JH, Kissel JC. Biologic monitoring to characterize organophosphorus pesticide exposure among children and workers: An analysis of recent studies in Washington State. *Environ Health Perspect*. 2005; 113(11):1651-7.
- 30) Kissel JC, **Curl CL**, Kedan G, Lu CA, Griffith W, Barr DB, Needham LL, Fenske RA. Comparison of organophosphorus pesticide metabolite levels in single and multiple daily urine samples collected from pre-school children in Washington State. *J Expo Anal Environ Epidemiol*. 2005; 15(2):164-71.
- 31) Fenske RA, Kissel JC, Shirai JH, **Curl CL**, Galvin K. Agricultural task not predictive of children's exposure to OP pesticides. *Environ Health Perspect*. 2004; 112(15):A865-6.

- 32) **Curl CL**, Fenske RA, Elgethun K. Organophosphorus pesticide exposure to urban and suburban pre-school children with organic and conventional diets. *Environ Health Perspect.* 2003; 111(3):377-82. **\*Chosen as a "Science Selection" for the issue.**
- 33) Doran EM, Fenske RA, Kissel JC, **Curl CL**, Simcox NJ. Impact of dermal absorption factors in occupational exposure assessment: comparison of two models for agricultural reentry workers exposed to azinphosmethyl. *Appl Occup Environ Hyg.* 2003; 18(9): 669-77.
- 34) Fenske RA, **Curl CL**, Kissel JC. The effect of the 14-day agricultural restricted entry interval of azinphosmethyl exposures in a group of apple thinners in Washington state. *Toxicol Pharmacol.* 2003; 38(1): 91-7.
- 35) Thompson B, Coronado G, Grossman J, Puschel K, Soloman C, Islas I, **Curl CL**, Shirai J, Kissel J, Fenske R. Pesticide take-home pathway among children of agricultural workers: study design, methods, and baseline findings. *J Occup Environ Med.* 2003; 45(1): 42-53.
- 36) **Curl CL**, Fenske RA, Kissel JC, Shirai JH, Moate TF, Griffith W, Coronado G, Thompson B. Evaluation of take-home organophosphorus pesticide exposure among agricultural workers and their children. *Environ Health Perspect.* 2002; 110(12): A787-92 **\*Chosen as a "Science Selection" for the issue.**
- 37) Fenske RA, Kedan G, Lu C, Fisker-Andersen J, **Curl CL**. Assessment of organophosphorus pesticide exposures in the diets of preschool children in Washington State. *J Expo Anal Environ Epidemiol.* 2002; 12: 21-28.
- 38) Moate TF, Furia M, **Curl CL**, Muniz JF, Yu J, Fenske RA. Size exclusion chromatographic cleanup for the determination of organophosphorus pesticide residues in household and vehicle dust. *J Assoc Offic Anal Chem.* 2002; 85(1): 36-43.

#### INVITED EDITORIALS

- 1) **Curl CL**. How much pesticide residue is in your diet? It depends what you eat – and how it's grown. Companion to Rempel et al. Diet and food type affect urinary pesticide residue excretion profiles in healthy individuals; results of a randomized, controlled dietary intervention trial. *Am J Clin Nutr.* 2022; 115(2):325-6.

#### REFEREED CONFERENCE SYMPOSIA

- 1) Assessing Herbicide Impacts on Reproduction, Birth Outcomes & Children's Development. Annual Meeting of the American Public Health Association. Boston, MA. Co-chair, November 2022.
- 2) Glyphosate: Regulation, Exposure, Toxicity and Controversy. International Society of Environmental Epidemiology. Washington, DC/Virtual On-line. Co-chair, August 2020.
- 3) Evidence-Based Research on Interventions to Reduce Personal Exposures to Environmental Pollutants, International Society of Exposure Science Conference. Utrecht, The Netherlands. Co-Chair, October 2016.

#### CONFERENCE PROCEEDINGS/ABSTRACTS (Mentored trainees starred)

- 1) **Curl CL**. Overcoming Challenges in Measuring Glyphosate Exposure among Pregnant Women in Rural Idaho. November 2022. Annual Meeting of the American Public Health Association. Boston, MA. (Oral).
- 2) Hyland C\*, McConnell K, DeYoung E, **Curl CL**. Evaluating the Accuracy of Satellite-Based Methods to Estimate Residential Proximity to Agricultural Crops. September 2022. Annual Meeting of the International Society of Exposure Science. Lisbon, Portugal. (Oral).
- 3) **Curl C**, Hyland C, Spivak M. Assessing Exposure to Pesticides with Short Biological Half-Lives: Use of a Repeated Longitudinal Biomonitoring Strategy to Estimate Glyphosate Exposure during Pregnancy. September 2022. Annual Meeting of the International Society of Environmental Epidemiology. Athens, Greece. (Poster).

- 4) Hyland C\*, Ruiz I, Meierotto L, Som Castellano R, **Curl C**. Forging Community Partnerships to Examine Pesticide Exposure and Risk Perceptions among Latinx Farmworkers. September 2022. Annual Meeting of the International Society of Environmental Epidemiology. Athens, Greece. (Poster).
- 5) Som Castellano R, Meierotto L, **Curl C**, Hyland C. Carework, Pesticide Exposure and Structural Violence among Latine Farmworkers. August 2022. Annual Meeting of the Rural Sociological Society. Westminster, CO. (Oral)
- 6) Ellison B\*, Hernandez A, O'Brien A, Schvaneveldt C, Watkins E, Balentine A, Spivak M, Hyland C, **Curl C**. Challenges and Opportunities in Human Subjects Research: Assessing Glyphosate Exposure in Pregnant Women. Idaho Conference on Undergraduate Research. April 2022. Boise, ID/Virtual On-line. (Poster & Selected as Plenary Lightning Presentation)
- 7) Hernandez A, Meierotto L, Som Castellano R, Ruiz, I, **Curl CL**, Hyland C. The Importance of Community for a Study Examining Pesticide Exposure and Risk Perceptions among Latinx Farmworkers. Idaho Conference on Undergraduate Research. April 2022. Boise, ID/Virtual On-line. (Poster)
- 8) Som Castellano R, Meierotto L, **Curl C**. Pesticide Exposure and its Aftermath: A Case Study of Idaho Farmworkers. May 2022. Agriculture, Food & Human Values Society (AFHVS) / Association for the Study of Food and Society (ASFS). Athens, GA. (Oral)
- 9) Lartey D, Greenwood M, Linse G, Moyce S, **Curl C**, Spivak M, Johnson E. Estimating Differences in Risk of Chronic Kidney Disease based on Water Intake in a National Sample. *Annals of Nutrition and Metabolism*. September 2021; 77(suppl 4): 30-32. Virtual/Online. (Oral)
- 10) Ellison B\*, Hernandez A, O'Brien A, Balentine A, Hyland C, **Curl CL**. Challenges and Opportunities in Human Subjects Research: Assessing Glyphosate Exposure in Pregnant Women. July 2021. Idaho Conference on Undergraduate Research. Boise, ID/Virtual On-line. (Poster)
- 11) Hernandez A\*, Ellison B, O'Brien A, Balentine A, Hyland C, **Curl CL**. An Analysis of Different Layers of Inclusive Research. July 2021. Idaho Conference on Undergraduate Research. Boise, ID/Virtual On-line. (Poster)
- 12) Som Castellano R, Meierotto L, **Curl CL**. Pesticide Exposure and its Aftermath: A Case Study of Idaho Farmworkers. November 2021. American Anthropological Association Annual Conference. Virtual. (Oral)
- 13) Meierotto L, **Curl CL**, Som Castellano R. Nature in Agriculture: Race-based Exclusion of Latinx Knowledge and Contributions. October 2021. Nature and Health Virtual Conference. Virtual. (Oral)
- 14) Weber N\*, **Curl CL**. What animal studies can teach us about glyphosate toxicity in pregnant women and their children. April 2020. Boise State Undergraduate Research Conference. Boise, ID/Virtual On-line. (Poster & Selected as Plenary Lightning Presentation)
- 15) Romero AJ\*, **Curl CL**. Methodology to assess the effect of exposure to environmental toxins on reproductive health and birth outcomes. April 2020. Boise State Undergraduate Research Conference. Boise, ID/Virtual On-line. (Poster)
- 16) **Curl CL**, Phinney R, Meierotto L, Som Castellano R. Assessment of risk factors for health disparities among Latina farmworkers. October 2019. NIH IDEa Western Regional Conference. Las Vegas, NV. (Oral)
- 17) Meierotto L, Som Castellano R, **Curl CL**. Latina farmworkers engaging nature: situated perspectives on environment, justice and health. November 2019. American Anthropological Association. Vancouver, British Columbia, Canada. (Oral)
- 18) **Curl CL**, Torres C, Meierotto L, Som Castellano R. Occupational risk factors for health disparities among Latina farm workers in southern Idaho. August 2019. International Society for Environmental Epidemiology. Utrecht, The Netherlands. (Poster)
- 19) Phinney R\*, Adams K, Blua M, **Curl CL**. Recognizing and reducing safety hazards in Northwest potato production. August 2019. Western Agricultural Safety and Health Conference. Seattle, WA. (Poster)

- 20) Som Castellano R, Meierotto L, **Curl CL**. Considering well-being: Definitions and challenges for Latina farm workers in southern Idaho. August 2019. Annual Meeting of the Rural Sociological Society. Richmond, VA. (Oral)
- 21) **Curl CL**, Meierotto L, Som Castellano R. Assessment of risk factors for health disparities among Latina farm workers. June 2019. Annual Meeting of the Mountain West IDeA Clinical and Translational Research-Infrastructure Network (CTR-IN). Las Vegas, NV. (Oral)
- 22) Phinney R\*, Adams K, Blua M, **Curl CL**. Recognizing and reducing safety hazards in Northwest potato production. April 2019. Graduate Student Showcase. Boise, ID. (Poster)
- 23) Meierotto L, Som Castellano R, **Curl CL**. Health and well-being disparities among Latina farm workers in southwestern Idaho. March 2019. Society for Applied Anthropology. Portland, OR. (Oral)
- 24) Phinney R\*, Adams K, Blua M, **Curl CL**. Recognizing and reducing safety hazards in Northwest potato production. January 2019. Cascadia Annual Symposium on Environmental, Occupational and Public Health. Blaine, WA. (Poster) **\*Awarded top student poster.**
- 25) Shewmaker GE, **Curl CL**. Inorganic bromide concentrations in crops following soil fumigation with methyl bromide. November 2018. American Society of Agronomy & Crop Science Society of Agronomy. Baltimore, MD. (Poster)
- 26) **Curl CL**, Calafat A, Ospina M, Penwell I, Porter, J, Wheatley, J. Effect of a longitudinal, randomized organic diet intervention on 2,4-D, pyrethroid, and organophosphate pesticide exposures among pregnant women. August 2018. Joint meeting of the International Society of Exposure Science and Environmental Epidemiology. Ottawa, Canada. (Oral)
- 27) **Curl CL** and Adams K. Recognizing and reducing safety hazards in Northwest potato production. February 2018. North American Agricultural Safety Summit. Scottsdale, AZ. (Poster)
- 28) **Curl CL**, Marshall JM, Moll M, Morra M, Porter J, Rogers C, Shewmaker G. Assessment of inorganic bromide concentrations in crops following soil fumigation with methyl bromide. October 2017. 27<sup>th</sup> Annual Meeting of the International Society of Exposure Science. Durham, NC. (Poster)
- 29) Penwell I\*, Porter J, Spain A, **Curl CL**. Partnering with WIC to study dietary exposure to agricultural pesticides during pregnancy. April 2017. National WIC Association Annual Conference. Philadelphia, PA. (Poster)
- 30) Porter J\* and **Curl CL**. Effect of a randomized, blinded organic diet intervention on pesticide exposure among pregnant women. October 2016. 26<sup>th</sup> Annual Meeting of the International Society of Exposure Science. Utrecht, The Netherlands. (Oral)
- 31) Porter J\* and **Curl CL**. Manganese-based pesticides and their potential adverse health effects in Idaho agricultural workers. April 2015. Undergraduate Research Conference, Boise State University. Boise, ID. (Poster)
- 32) **Curl CL**, Beresford S, Fenske R, Fitzpatrick A, Lu A, Nettleton J, Kaufman J. Association between long-term dietary exposure to organophosphate pesticides and neurocognition: the Multi-Ethnic Study of Atherosclerosis (MESA). August 2014. 26<sup>th</sup> Annual Meeting of the International Society of Environmental Epidemiology. Seattle, WA. (Oral)
- 33) **Curl CL**, Fenske RA, Lu C, Nettleton J, Kaufman J. Assessing chronic organophosphate pesticide exposure with food frequency questionnaires and self-reported organic food consumption. January 2014. University of Washington/ University of British Columbia/Simon Fraser University Annual Symposium on Environmental, Occupational and Population Health. Blaine, WA. (Oral)
- 34) **Curl CL**, Fenske RA, Lu C, Nettleton J, Kaufman J. Assessment of dietary exposure to organophosphorus pesticides using food frequency questionnaires and information on organic food consumption habits. August 2013. Joint Conference of the International Societies of Exposure Science, Environmental Epidemiology, and Indoor Air Quality. Basel, Switzerland. (Poster, Awarded 3<sup>rd</sup> Place in Student Poster Competition).

- 35) **Curl CL**, Fenske RA, Lu C, Nettleton J, Kaufman J. Dietary exposure to organophosphorus pesticides in the Multi-Ethnic Study of Atherosclerosis (MESA). October 2012. 22<sup>nd</sup> Meeting of the International Society of Exposure Science. Seattle, WA. (Poster)
- 36) **Curl CL**, Adar SD, Cohen MA, Hinckley-Stukovsky K, Allen R, Mancera-Cuevas K, Nunn C, Castro C, Christman C, Dwight C, Kaufman J. An evaluation of time-location data: The Multi-Ethnic Study of Atherosclerosis and Air Pollution (MESA Air). October 2008. Joint Conference of the International Societies of Exposure Science and Environmental Epidemiology. Pasadena, CA. (Poster)
- 37) **Curl CL** and Alderman N. Nutrition and physical activity environments in Connecticut public schools. December 2005. 133<sup>rd</sup> Annual Meeting of the American Public Health Association. Philadelphia, PA. (Oral)
- 38) **Curl CL**, Elgethun K, Fenske RA. Organophosphorus pesticide exposure to urban and suburban pre-school children with organic and conventional diets. August 2002. Joint Conference of the International Societies of Exposure Analysis and Environmental Epidemiology. Vancouver, BC. (Oral)
- 39) **Curl CL**, Kedan G, Lu C, Fisker-Andersen, Fenske RA. Evaluation of pesticide exposure in the diets of preschool children using duplicate diet sampling. November 2001. 11<sup>th</sup> Annual Meeting of the International Society of Exposure Analysis. Charleston, SC. (Oral)

#### INVITED ORAL PRESENTATIONS

- 1) Assessment of insecticide and herbicide exposure among Latina farmworkers and pregnant women. University of California at Santa Cruz Department of Microbiology and Environmental Toxicology Seminar Series. (Virtual). November 2021.
- 2) Agricultural Pesticides. Osher Lifelong Learning Institute. Boise, ID. October 2020.
- 3) Pesticide Exposure and Child Health: New Evidence and Putting it into Practice. St. Luke's Pediatric Grand Rounds. Boise, ID. September 2020.
- 4) Tools to evaluate and reduce safety hazards on the farms where you work. Agriculture Safety Day. Kennewick and Wenatchee, WA. February 2020.
- 5) Organic food: to eat or not to eat? Osher Lifelong Learning Institute. Boise, ID. November 2019.
- 6) Assessment of insecticide and herbicide exposure among Latina farmworkers and pregnant women: challenges and opportunities in working with vulnerable populations. University of Illinois Interdisciplinary Environmental Toxicology Seminar Series. Urbana, IL. September 2019.
- 7) Organic food and agricultural workers. Public Health Education & Development Idaho. Boise, ID. April 2019.
- 8) Healthy Planet = Healthy People. Boise State University's Earth Day Celebration. Boise, ID. April 2018.
- 9) Understanding the effect of agricultural production on farmworkers, agricultural communities and consumers. College of Health Science Board of Ambassadors Meeting. Boise, ID. October 10, 2017.
- 10) The importance of Science for Idaho's Land and Water Resources: A Lightning Talk. Boise State University's Celebrate Science Event. Boise, ID. April 2017.
- 11) Exposure to agrochemicals: Understanding the effect of agricultural production on workers, families and communities. St. Luke's/Boise State University Research Collaboration Forum. Boise, ID. November 2016.
- 12) What are buying when we buy organic food? Idaho Academy of Nutrition and Dietetics Annual Meeting. Pocatello, ID. April 2016.
- 13) Ag health and safety. Snake River Chapter of the American Society of Safety Engineers. Boise, ID. 2016.
- 14) Agricultural Health and Safety. SafetyFest of the Great Northwest. Boise, ID. January 2016.
- 15) Current topics in agricultural health and safety. Idaho Chapter of the American Industrial Hygiene Society. Boise, ID. November 2015.

- 16) Dietary exposure to organophosphate pesticides. 12<sup>th</sup> Annual Meeting of Pediatric Environmental Health Scholars. Reston, VA. December 2013.
- 17) Pesticides & food: What are the health risks? University of Washington School of Public Health Public Health Café. Seattle, WA. January 2013.
- 18) Pesticides in our food: Does eating organic matter? Pacific Science Center and KCTS 9 Public Television's Science Café. Tacoma, WA. November 2013.

#### SELECTED MEDIA COVERAGE

PBS	NBC News	Fast Company & Inc.
New York Times	Consumer Reports	NPR Boise State Public Radio
TIME Magazine	Salon	Idaho Statesman
Huffington Post	Gimlet Media's "Science Vs."	KTVB Boise
Bloomberg	Civil Eats	

#### PROFESSIONAL ACTIVITIES

##### BOISE STATE UNIVERSITY SERVICE

###### *University-Level Service*

- 2019-2022 Judge, Graduate Student Research Showcase
- 2018- Affiliate Faculty, Human Environment Systems, College of Innovation and Design
- 2017- Member, Research Subcommittee of the Information Technology Planning & Prioritization Council
- 2017- Member, Boise State University Faculty Research Advisory Misconduct Committee
- 2016- Member, Boise State University Biomedical Institutional Review Board

###### *College-Level Service*

- 2022 Member, Interim Divisional Dean Search Committee
- 2017- Member, Research Strategic Planning Committee
- 2016-17 Member, and Tenure Committee
- 2015 Member, Change in Employee Compensation Task Force

###### *Department/School-Level Service*

- 2022 Member, SPPH, Faculty Search Committee
- 2021- Chair, SPPH, Faculty Affairs Committee
- 2021- Member, SPPH, Policy and Administration Committee
- 2020- Chair / Member, SPPH & CEH, Ad Hoc Personnel / P&T Committee
- 2015-19 Chair / Member, CEH, Faculty Search Committee

##### LOCAL AND REGIONAL SERVICE

- 2019 Member, Treasure Valley Food Coalition & Boise Farmer's Market Transition Team
- 2018- Co-Chair, External Advisory Board, Northwest Center for Occupational Health and Safety
- 2018- Member, Northwest Center for Occupational Health and Safety Pilot Projects Review Panel
- 2016- Member, Boise Chamber of Commerce Food and Agriculture Industry Board

##### NATIONAL AND INTERNATIONAL SERVICE

- 2018- Associate Editor, Journal of Agromedicine
- 2017- Editorial Review Board, International Journal of Hygiene and Public Health



2017- Editorial Review Board, Journal of Exposure Science and Environmental Epidemiology  
 2017-2018 Student/New Researcher Committee, International Society of Exposure Science Conference

#### **AFFILIATE FACULTY APPOINTMENTS**

2022- Affiliate Associate Professor, Dept of Env and Occup Health Sciences, University of Washington  
 2020-2022 Affiliate Assistant Professor, Dept of Env and Occup Health Sciences, University of Washington

#### **MEMBERSHIPS AND LEADERSHIP POSITIONS IN PROFESSIONAL SOCIETIES**

International Society for Children's Health and the Environment  
 International Society of Environmental Epidemiology  
 International Society of Exposure Science (Treasurer, 2023)

#### **SCIENTIFIC JOURNAL REVIEW**

American Journal of Clinical Nutrition	Journal of Agromedicine
Environmental Health Perspectives	Journal of Exposure Science & Environ Epidemiology
Environment International	Occupational and Environmental Medicine
Environmental Research	Pediatrics
Environmental Science and Technology	Public Health Nutrition
JAMA Pediatrics	Science of the Total Environment

#### **TEACHING**

- 2017 Golden Apple Award for Excellence in Teaching (Honorable Mention)
- "Ten for Teaching" Certificate of Program Completion from the Boise State University Center for Teaching and Learning (CTL), December 2020
- Instructor for Epidemiology (HLTHST 480. Each semester, Spring 2015-Spring 2018, Spring 2019, Spring 2020, Spring 2021, Spring 2022). ~40 students per semester. Course Evaluation Scores (average): **4.7/5.0**.
- Invited educator for Osher Lifelong Learning Institute, Boise State University. Agricultural Pesticides. 2020.
- Invited educator for Osher Lifelong Learning Institute, Boise State University. Organic Food: To Eat or Not to Eat? 2019
- Guest lecturer in Environmental Health Thesis Proposal (University of Washington, ENVH583, 2022)
- Guest lecturer in Environmental Health and Occupational Health Sciences Seminar (Boise State University, EOHS498, 2021)
- Guest lecturer in Bridges to Baccalaureate Science Communication Seminar (Boise State University, BOI497, 2020)
- Guest lecturer in Prevention & Intervention in Public Health Practice (Boise State University MHS502, 2020)
- Guest lecturer in Toxicology for Environmental and Occupational Health (Boise State University, EOHS435, 2019, 2020)
- Guest lecturer in Introduction to Health Science and Public Health (Boise State University, HLTH110, 2019)
- Guest lecturer in Food & Society (Boise State University, SOC 497/ENV 498, 2018)
- Guest lecturer in Rural Sociology (Boise State University, SOC 426, 2018)
- Guest lecturer in Occupational Safety and Health (Boise State University ENVHLTH 415, 2016 & 2018)
- Guest lecturer in Public Health (Boise State University, HLTHST 304, 2017)
- Guest lecturer in Health Science Studies Capstone (Boise State University HLTHST 400, 2016-2018)
- Guest lecturer in Special Topics in Sociology (Boise State University SOC 497, 2016)
- Guest lecturer in Food and Ethics (Boise State University UF 200, 2016)
- Guest lecturer in Food Safety and Health (University of Washington NUTR545/ENVHLTH540, 2014)
- Guest lecturer in Harvest to Health (University of Washington NUTR302, 2014)

#### **ADVISING AND MENTORING**

*Post-Doctoral Trainees*

Carly Hyland 2021-

*Graduate Students*

Annica Balentine 2020-2022 *MS in Health Science Studies*  
 Christopher Herrera 2019-2020 *MS in Health Science Studies*  
 Rachel Phinney 2018-2020 *MS in Health Science Studies*

*Graduate Thesis Committee Service (\*indicates service as Committee Chair)*

Camryn Lopez 2022- *MPH*  
 Terrell Engmann 2022- *PhD, Serving as Graduate Faculty Representative*  
 Rachel Phinney\* 2018-2020 *MS in Health Science Studies*  
 Jessica Porter 2018-2019 *MS in Environmental and Occupational Health (UW)*

*Undergraduate Students*

Elysia Watkins 2021-2022 *INBRE Fellow*  
 Carson Schvaneveldt 2021-2022 *Student Volunteer*  
 Brie Ellison 2020-2022 *INBRE Fellow*  
 Alejandra Hernandez 2020-2022 *McNair Scholar*  
 Allison O'Brien 2020-2021 *Student Volunteer*  
 Taylor Oxley 2020 *Student Volunteer*  
 Alyssa Romero 2020 *HERC Fellow*  
 Nathan Weber 2019-2020 *INBRE Fellow*  
 Karen Sanchez 2019 *Student Volunteer*  
 Alondra Murillo 2019 *Student Volunteer*  
 Emily Pape 2019 *Student Volunteer*  
 Justin Nelson 2017 *Student Volunteer*  
 Abigail Thomas 2017 *Student Volunteer*  
 Dana Kerins 2017 *For-Credit Internship*  
 Rachel Phinney 2017 *For-Credit, Graduate-Level Independent Study*  
 Makaela Bournazian 2016-2017 *Student Volunteer*  
 Jon Wheatley 2016-2017 *For-Credit Internship*  
 Ian Penwell 2016-2017 *HERC Fellowship*  
 Hope Murray 2016 *For-Credit Internship*  
 Jessica Porter 2015-2016 *Research and Teaching Assistantship*  
 Corinne Stinette 2015 *Student Volunteer*

**Kimberly J. Rauscher, ScD, MA**

Professor

School of Public and Population Health

Boise State University

[kimberlyrauscher@boisestate.edu](mailto:kimberlyrauscher@boisestate.edu)

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**EDUCATION**

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2005	<p>Doctor of Science  Work Environment Department. University of Massachusetts Lowell  Concentration: Public Policy  Doctoral Traineeship: The National Institute for Occupational Safety and Health,  2000-02</p>
2000	<p>Master of Arts  Regional Economic and Social Development Department. University of  Massachusetts Lowell.  Outstanding Graduate Student: 1998</p>
1998	<p>Bachelor of Arts  Political Science Department. University of Massachusetts Amherst.  Minors: Sociology and Psychology</p>

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**EXPERIENCE**

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**Academic**

2022-	<p>Professor. School of Public and Population Health. College of Health Sciences.  Boise State University. Boise, ID.</p>
2019-2022	<p>Associate Professor. Department of Public Health and Population Science (<i>formerly</i>  Community and Environmental Health). College of Health Sciences. Boise State  University. Boise, ID.</p>
2019-	<p>Adjunct Associate Professor. Department of Occupational and Environmental Health  Sciences. School of Public Health. West Virginia University. Morgantown, WV</p>
2016-2019	<p>Associate Professor. Department of Occupational and Environmental Health  Sciences. School of Public Health. West Virginia University. Morgantown, WV</p>
2010-2018	<p>Faculty Affiliate. West Virginia University Injury Control Research Center.  Morgantown, WV</p>
2010-2016	<p>Assistant Professor. Department of Occupational and Environmental Health  Sciences. School of Public Health (<i>prior to 2012: Department of Community  Medicine, School of Medicine</i>). West Virginia University. Morgantown, WV</p>

- 2008-2010 Adjunct Faculty. Department of Health Behavior and Health Education. Gillings's School of Global Public Health. The University of North Carolina at Chapel Hill. Chapel Hill, NC.
- 2006-2010 Research Scientist. University of North Carolina Injury Prevention Research Center. Chapel Hill, NC
- 2000-2005 Graduate Teaching and Research Assistant. Work Environment Department, University of Massachusetts Lowell. Lowell, MA.
- 1998-2000 Graduate Research Assistant. Regional Economic and Social Development Department, University of Massachusetts Lowell. Lowell, MA.

**Professional/Consulting**

- Jan-Jul 2006 Outreach Program Coordinator. Occupational Health Surveillance Program. Massachusetts Department of Public Health. Boston, MA
- May-Aug 2005 Writer/Editor. Contributed to the inaugural grant application titled "Center for the Promotion of Health in the New England Workplace (CPH-NEW)." This application was submitted by the University of Massachusetts Lowell and the University of Connecticut and was funded by the National Institute for Occupational Safety and Health.
- May-Aug 2005 Writer/Editor. Co-wrote and edited a proposal to create a new doctoral program in Green Chemistry and Engineering submitted to the Board of Governors of the University of Massachusetts Lowell. School of Engineering. University of Massachusetts Lowell.
- May-Aug 1998 Data Analyst. Office on Health and Disability, Massachusetts Department of Public Health. Boston, MA. Entered, coded and analyzed survey data and produced a report evaluating the effectiveness and appropriateness of health-related service delivery to people with disabilities in MA.
- May-Aug 1997 Data Analyst. Massachusetts Breast Cancer Research Program, Massachusetts Department of Public Health. Boston, MA. Managed and analyzed quantitative and qualitative survey data and contributed to a summary report on the activities and successes of a breast cancer research program that provides seed funding to early career investigators.

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**PUBLICATIONS**

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*\*indicates student collaboration*

**Peer-reviewed Manuscripts**

1. Evans K\*, Myers D, Rockefeller K, **Rauscher KJ**, Allen A, Weimin G. (2021). A Qualitative Exploration of the Lift Equipment Uses and Needs of Physical and Occupational Therapists and Assistants Participating in Safe Patient Handling and Mobility Programs. *International Journal of Safe Patient Handling and Mobility*. Vol. 11, Issue 2 (June): 76-85.
2. Lundstrom E\*, Myers D, Lundstrom W, **Rauscher KJ**, and Fullen M. (2021). A Comparison of Owner/Operator and Worker Perspectives on Workplace Safety in the West Virginia Logging Industry. *American Journal of Industrial Medicine*. Vol. 64, Issue 4 (Apr): 301-309.
3. **Rauscher KJ**, Bush D, Chang C, and Myers D. (2020). Occupational Safety and Health Education in Post-secondary Career and Technical Education Construction Programs. *Career and Technical Education Research*. Vol. 45, Issue 3 (Dec): 63-81.
4. Brown B\*, Myers DJ, Casteel C, and **Rauscher, KJ**. (2020). Exploring Differences in the Workplace Violence Experiences of Young Workers in Middle and Late Adolescence in the US. *Journal of Safety Research*. Vol. 74 (Sept): 263-269.
5. Bush D, Chang C, **Rauscher KJ**, and Myers DJ. (2019). Essential Elements for Effective Safety and Health Education in Post-secondary Construction Career Technical Education. *New Solutions: A Journal of Environmental and Occupational Health Policy*. Vol. 29, Issue 1 (May): 53-75.
6. Zhu M, Rudisill T, **Rauscher KJ**, Davidov D, and Feng J.\* (2018). Risk Perceptions of Cell Phone Use While Driving: Results from a Delphi Survey. *International J. of Environmental Research and Public Health*. Vol. 15, Issue 6 (May): 1074.
7. **Rauscher KJ**, Myers DJ, and Miller, M. (2016). Work-Related Deaths among Youth: Understanding the Contribution of US Child Labor Violations. *American Journal of Industrial Medicine*. Vol. 59, Issue 11 (Nov): 959-968.
8. **Rauscher KJ** and Myers DJ. (2016). Occupational Fatalities among Young Workers under the Age of 18 in the United States: 2001- 2012. *American Journal of Industrial Medicine*. Vol. 59, Issue 6 (June): 445-452.
9. Brinker K, Jacobs T, Shire J, Bunn T, Chalmers J, Dang G, Flammia D, Higgins S, Lackovic M, Lavender A, Lewis J, Li Y, Harduar Morano L, Porter A, **Rauscher KJ**, Slavova S, Watkins S, Zhang L, and Funk R. (2016). Fatal Work-Related Injuries—Southeastern United States, 2008–2011. *Workplace Health and Safety*. Vol. 64, Issue 4 (Apr): 135-140.

10. **Rauscher KJ**, Casteel C, Bush D, and Myers DJ. (2015). Factors Affecting High School Teacher Adoption, Sustainability and Fidelity to the “Youth@Work: Talking Safety” Curriculum. *American Journal of Industrial Medicine*. Vol. 58, Issue 12) (July): 1288-1299.
11. Gold J, **Rauscher KJ** (*corresponding author*), and Zhu, M. (2015). Validity of Self-reported Texting Frequency, Cell Phone Characteristics, and Texting Styles among Young Adults. *BMC Res Notes*. Vol. 8 (Apr): 120.
12. **Rauscher KJ** and Myers DJ. (2014). Occupational Health Literacy and Work-related Injury among US Adolescents. *International Journal of Injury Control and Safety Promotion*. Vol. 21, Issue 1 (Jan): 81-89.
13. **Rauscher KJ**, Wegman DH, Wooding J, Davis L, and Junkin, R\*. (2013). Adolescent Work Quality: A View from Today’s Youth. *Journal of Adolescent Research*. Vol. 28, Issue 5 (Sept): 557-590.
14. **Rauscher KJ**, Runyan CW, and Radish D. (2012). Adolescent Occupational Fatalities in North Carolina (1990-2008): An Investigation of Child Labor and OSHA Violations and Enforcement. *New Solutions: A Journal of Environmental and Occupational Health Policy*. Vol. 22, Issue 4 (Jan): 473-488.
15. **Rauscher KJ**, Runyan CW, and Radish D. (2012). Using Death Certificate and Medical Examiner Data for Adolescent Occupational Fatality Surveillance and Research: A Case Study. *Journal of Occupational and Environmental Hygiene*. Vol. 9, Issue 10 (Jan): 609-15.
16. **Rauscher KJ**, Myers DJ, Runyan CW, and Schulman M. (2012). Young worker safety in construction: Do family ties and workgroup size affect hazard exposures and safety practices? *Work: A Journal of Prevention Assessment & Rehabilitation*. Vol. 42, Issue 4 (Jan): 549-58.
17. Runyan CW, Lewko J, and **Rauscher KJ**. (2012). Setting an Agenda for Advancing Young Worker Safety in the US and Canada. *Public Health Reports*. Vol. 127, Issue 3 (May/June): 246-252.
18. Runyan CW, Vladutiu CJ\*, Schulman M, and **Rauscher KJ**. (2011). Parental Involvement with Working Teens. *Journal of Adolescent Health*. Vol. 49 (Jul): 84-86.
19. **Rauscher KJ**, Runyan CW, and Radish D. (2011). Work-related Fatalities among Youth Ages 11-17 in North Carolina, 1990-2008. *American Journal of Industrial Medicine*. Vol. 54, Issue 2 (Feb): 136-142.
20. **Rauscher KJ**, Schulman M, and Runyan CW. (2010). Construction firm practices and manager beliefs regarding the employment and safety of teenaged employees: A North Carolina based study. *Work: A Journal of Prevention Assessment & Rehabilitation*. Vol. 37, Issue 2 (Jan): 145-154.
21. **Rauscher KJ**, Runyan CW, and Schulman M. (2010). Awareness and Knowledge of the U.S. Child Labor Laws among a National Sample of Working Adolescents and their Parents. *Journal of Adolescent Health*. Vol. 47, Issue 4 (Oct): 414-417.

22. Vladutiu CJ\*, **Rauscher KJ**, Runyan CW, Schulman M, and Villaveces A. (2010). Hazardous Task Recognition among U.S. Adolescents Working in the Retail or Service Industry. *American Journal of Industrial Medicine*. Vol. 53, Issue 7 (Jul): 686-692.
23. Runyan CW, Vladutiu CJ\*, **Rauscher KJ**, and Schulman M. (2008). Teen Workers' Exposures to Occupational Hazards and Use of Personal Protective Equipment. *American Journal of Industrial Medicine*. Vol. 51, Issue 10 (Oct): 735-740.
24. **Rauscher KJ**, Runyan CW, Schulman M, and Bowling JM. (2008). U.S. Child Labor Violations in the Retail and Service Industries: Findings of a National Survey of Working Adolescents. *American Journal of Public Health*. Vol. 98, Issue 9 (Sept): 1693-1699.
25. **Rauscher KJ**. (2008). Workplace Violence against Adolescents in the US. *American Journal of Industrial Medicine*. Vol. 51, Issue 7 (July): 539-544.
26. **Rauscher KJ** and Myers DJ. (2008). Socioeconomic Disparities in the Prevalence of Work-related Injuries among Adolescents in the United States. *Journal of Adolescent Health*. Vol. 42, Issue 1 (Jan): 50-57.

#### Abstracts

1. Myers DJ and **Rauscher KJ**. (2011). Socioeconomic Disparities in Work-Related Injury Prevalence among Teens. Proceedings of the First National Conference on Eliminating Health and Safety Disparities at Work. Chicago, IL. p. 56.
2. **Rauscher KJ**, Myers DJ, Runyan CW, and Schulman M. (2010). Exploring social contexts at work and how they affect the safety of young construction workers. *Injury Prev*. Vol. 16. Supplement No.1.

#### Monographs/Reports

1. Runyan CW, Lewko J, **Rauscher KJ**, Castillo, D, and Brandspigel, S. (Eds.) (2013). *Health and Safety of Young Workers: Proceedings of a US and Canadian Series of Symposia*. National Institute for Occupational Safety and Health. DHHS (NIOSH) Publication No. 2013-144.
2. Runyan CW, Lewko J, **Rauscher KJ**, and Castillo, D. (2013). Introduction. In Runyan CW, Lewko J, Rauscher KJ, Castillo, D and Brandspigel, S. (Eds.). *Health and Safety of Young Workers: Proceedings of a US and Canadian Series of Symposia*. National Institute for Occupational Safety and Health. DHHS Pub #2013-144.
3. Runyan CW, Lewko J, and **Rauscher KJ**. (2013). Setting an Agenda for Advancing Young Worker Safety in the U.S. and Canada. In Runyan CW, Lewko J, Rauscher KJ, Castillo, D and Brandspigel, S. (Eds.). *Health and Safety of Young Workers: Proceedings of a US and Canadian Series of Symposia*. National Institute for Occupational Safety and Health. DHHS (NISH) Publication No. 2013-144.

4. **Rauscher KJ** and Runyan CW. (2013). The Prevalence of Working Conditions Associated with Adolescent Occupational Injury in the US: A Review of the Literature. In Runyan CW, Lewko J, Rauscher KJ, Castillo, D and Brandspigel, S. (Eds.). *Health and Safety of Young Workers: Proceedings of a US and Canadian Series of Symposia*. National Institute for Occupational Safety and Health. DHHS Pub #2013-144.
5. *Protecting Young Workers in Massachusetts: Recommendations of the Massachusetts Young Worker Initiative Task Force*. (2003). Massachusetts Young Worker Initiative Task Force.

#### **Research-to-Practice Publications**

Bush D, **Rauscher, KJ**, Chang C, Myers D, and Scruggs, K (2017). Your Construction Safety Program: Safe Students, Safe Workers A Guide for Administrators & Instructors in Post-Secondary Career Technical Education (CTE) Construction Programs. Available at: <https://www.cpwr.com/research/r2p-p2r-work-career-technical-education>

#### **Invited Publications**

1. **Rauscher KJ** and Fuller J. (*forthcoming, 2023*). The Work Environment and Children's Safety, Health, and Wellbeing. In Landrigan P and Etzel R (Eds). Textbook of Children's Environmental Health. Oxford University Press. Oxford.
2. Wooding J, Wegman DH, and Rauscher KJ. (2007). Massachusetts, USA. In Ingvar Lundberg, Tomas Hemmingsson, and Christer Hogstedt (Eds). Work and Social Inequalities in Health in Europe. Peter Liang Bruxelles.
3. **Rauscher KJ**. (2008). Review of Before Their Time: The World of Child Labor. *Injury Prevention*, Vol. 14.

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## **MEDIA**

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#### **Radio**

Rauscher KJ. "Adolescent Occupational Injuries." Recorded for the *Public Health Minute* produced for National Public Radio by the City University of New York. First aired June, 2016. Available at: <http://wp.lehman.edu/public-health-minute-with-william-latimer/adolescent-occupational-injury-kimberly-rauscher-scd-west-virginia-university/>



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## PRESENTATIONS

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*\*indicates student collaboration*

### Refereed Presentations

#### *International*

1. **Rauscher KJ**, Casteel C, Myers D, and Peek-Asa C. (2021). Sexual Harassment and Assault against Young Workers. *22<sup>nd</sup> Annual World Congress on Safety and Health at Work. International Labour Organization. Virtual Meeting.*
2. **Rauscher KJ**, Casteel C, Myers D, and Peek-Asa, C. (2021). Characteristics and Consequences of Workplace Violence Against Youth. *22<sup>nd</sup> Annual World Congress on Safety and Health at Work. International Labour Organization. Virtual Meeting.*
3. Lundstrom E\*, Myers D, **Rauscher KJ**, Fullen M and Lundstrom W. (2020). A Mixed-Methods Analysis of Hazard Perceptions in the West Virginia Logging Industry. *International Society for Agricultural Safety and Health Annual Conference. Virtual Meeting.*
4. Fullen M, Myers D, Lundstrom E\*, **Rauscher KJ**, Donnelly P, and Lundstrom W. (2020). Timber-Safe: An Organizational Intervention to Reduce West Virginia Logger Hazards. *International Society for Agricultural Safety and Health Annual Conference. Virtual Meeting.*
5. Gold JE, **Rauscher KJ**, and Zhu M. (2013). Validity of self-reported texting frequency, texting styles, and cell phone characteristics among college students. *8<sup>th</sup> International Scientific Conference on Prevention of Work-Related Musculoskeletal Disorders (PREMUS)*. Musculoskeletal Disorders Scientific Community of the International Commission of Occupational Health (ICOH). Busan, Korea.
6. **Rauscher KJ**, Myers DJ, Runyan CW, and Schulman M. (2010). Exploring social contexts at work and how they affect the safety of young construction workers. *11<sup>th</sup> Annual World Conference on Injury Prevention and Safety Promotion*. World Health Organization. London, UK.
7. Runyan CW, Villaveces A, **Rauscher KJ**, Bangdiwala SI, Yonas M, and Schulman MD. (2008). Adolescent Delinquency and Violence: Is employment protective? *9<sup>th</sup> Annual World Conference on Injury Prevention and Safety Promotion*. World Health Organization Merida, Mexico.

#### *National*

1. Lopez C,\* **Rauscher R**, Casteel C, Myers D, and Peek-Asa C. (May 2022). Young Worker Training in Workplace Violence. *National Occupational Injury Research Symposium (NOIRS)*. National Institute for Occupational Safety and Health (NIOSH). Morgantown, WV.

2. Fullen M, Takacs B\*, Lundstrom E,\* Lundstrom W, **Rauscher KJ**, and Myers D. (May 2022). Construction Trainer and Trainee Perspectives on the Quality and Effectiveness of the OSHA 10 Construction Course. *National Occupational Injury Research Symposium (NOIRS)*. National Institute for Occupational Safety and Health (NIOSH). Morgantown, WV.
3. **Rauscher KJ**, Brown B\*, Myers DJ, Casteel C, Peek-Asa C. (2019). Young Victims of Sexual Harassment at Work: Results from a National Telephone Survey. *American Public Health Association (APHA), Annual Meeting*, Philadelphia, PA.
4. **Rauscher KJ**, Casteel C, Myers D, and Peek-Asa, C. (2019). Workplace Violence Against Youth: Characteristics and Consequences. 13th International Conference on Work, Stress and Health. *American Psychological Association (APA)*. Philadelphia, PA.
5. Bush D, **Rauscher KJ**, Chang C, and Myers DJ. (2018). Safe students, safe workers: What makes a strong health and safety program for new construction workers in community colleges? *American Public Health Association (APHA) Annual Meeting*. San Diego, CA.
6. **Rauscher, KJ**, Casteel, C., Myers. (2018). Workplace Violence against Young Workers. *National Occupational Injury Research Symposium (NOIRS)*. National Institute for Occupational Safety and Health (NIOSH). Morgantown, WV.
7. Brown, B\*, Myers, D, Casteel, C, Branch, C, and **Rauscher, KJ**. (2018). Understanding Differences in the Workplace Violence Experiences of Teens and Young Adults. *National Occupational Injury Research Symposium (NOIRS)*. National Institute for Occupational Safety and Health (NIOSH). Morgantown, WV.
8. Brown B\*, Myers DJ, Casteel C, Branch, C, and **Rauscher KJ**. (2017). Workplace Violence Among Young Workers: Exploring Differences in the Experiences of High School and College Students. *American Public Health Association (APHA) Annual Meeting*. Atlanta, GA.
9. **Rauscher KJ**, Brown B\*, Casteel C, and Ranapurwala S. (2017). Workplace Violence and Its Consequences: Comparing Adult and Young Adult Workers. *American Public Health Association (APHA) Annual Meeting*. Atlanta, GA.
10. Bush D, Chang C, **Rauscher KJ**, and Myers DJ. (2016) Health and Safety Training for New Construction Workers in Community Colleges. *American Public Health Association (APHA) Annual Meeting*. Denver, CO.
11. **Rauscher KJ**, Myers DJ, Miller M, and Brown, B\*. (2015). Work-related Deaths among Children and Adolescents: An Analysis of the Magnitude and Nature of Cases Involving US Child Labor Violations. *American Public Health Association (APHA) Annual Meeting*. Chicago, IL.
12. Fullen, M, Lundstrom, W, **Rauscher, KJ**, and Myers, DJ. (2015). West Virginia Logger Hazard Awareness and Injury Risk Perception. *National Occupational Injury Research Symposium (NOIRS)*. National Institute for Occupational Safety and Health (NIOSH). Kingwood, WV.

13. **Rauscher KJ**, Miller M, and Myers D. (2015). Young Worker Fatalities Involving Child Labor Violations: An analysis of Twelve Years of data from the Census of Fatal Occupational Injuries. *National Occupational Injury Research Symposium (NOIRS)*. National Institute for Occupational Safety and Health (NIOSH). Kingwood, WV.
14. Brinker K, Jacobs T, Shire J, Bunn T, Chalmers J, Dang G, Flammia D, Higgins S, Lackovic M, Lewis J, Li Y, Harduar Morano L, Porter A, **Rauscher KJ**, Slovova S, Watkins S, Zhang L, Funk R and Lavender A. (2015). Fatal Work-related Injuries–Southeastern United States, 2008–2011. *50<sup>th</sup> US Public Health Service Scientific and Training Symposium*. Atlanta, GA.
15. Brinker K, Jacobs T, Shire J, Bunn T, Chalmers J, Dang G, Flammia D, Higgins S, Lackovic M, Lewis J, Li Y, Harduar Morano L, Porter A, **Rauscher KJ**, Slovova S, Watkins S, Zhang L, Funk R, and Lavender A. (2015). Fatal Work-related Injuries–Southeastern United States, 2008–2011. *Council of State and Territorial Epidemiologists Annual Conference*. Boston, MA.
16. **Rauscher KJ**, Casteel, C, Bush D, and Myers, DJ. (2014). Factor's Associated with High School Teachers Adoption, Usage Level and Fidelity to the Youth@Work: Talking Safety Curriculum. *American Public Health Association (APHA) Annual Meeting*. New Orleans, LA.
17. **Rauscher KJ**, Myers DJ, and Runyan CW. (2011). Occupational Health Literacy and the Risk of Work-related Injury among Young Workers in the US. *American Public Health Association (APHA) Annual Meeting*. Washington, DC.
18. Runyan CW, Lewko J, and **Rauscher KJ**. (2011). Roundtable: Setting an Agenda for Advancing Young Worker Safety in North America. *American Public Health Association (APHA) Annual Meeting*. Washington, DC.
19. Myers DJ and **Rauscher KJ**. (2011). Socioeconomic Disparities in Work-Related Injury Prevalence among Teens. *First National Conference on Eliminating Health and Safety Disparities at Work*. Chicago, IL.
20. **Rauscher KJ**, Runyan CW, and Radish D. (2010). Adolescent Work-related Fatalities and Child Labor and OSHA Standards Violations. *American Public Health Association (APHA) Annual Meeting*. Denver, CO.
21. **Rauscher KJ**, Runyan CW, Schulman M, and Bowling JM. (2007). U.S. Child Labor Violations in the Retail and Service Industries: Findings of National Survey of Working Adolescents. *American Public Health Association (APHA) Annual Meeting*. Washington, DC.
22. **Rauscher KJ** and Myers DJ. (2006). Socioeconomic Disparities in Risk of Occupational Injuries among Adolescents. *American Public Health Association (APHA) Annual Meeting*. Boston, MA.
23. **Rauscher KJ** (2001). Workplace Injuries and Assaults among Young Workers. *American Public Health Association (APHA) Annual Meeting*. Boston, MA.
24. **Rauscher KJ**, Wegman D, Wooding J, Hulbert K, Gibson J, Silka L, and Levenstein C. (1999). Working Youth in Lowell: Health, Safety and Education. *Committee on Industrial Theory & Assessment Conference: Healthy Communities, Social Equity & Sustainable Devel.* Lowell, MA.

***Regional/Local***

1. Lopez C\*, **Rauscher K**, Casteel C, Myers D, and Peek-Asa C. (2022). Workplace Violence Training among Young Workers 14–24 Years of Age in the US. *Graduate Showcase. Boise State University*. Boise, ID
2. Fullen M, Myers D, **Rauscher KJ**, Lundstrom W, Takacs B\*, Donnelly P, and Lundstrom E\*. (2019). Timber Safe-Reduction of West Virginia Logging Hazards. *West Virginia University Extension Service Annual Conference*. Weston, WV.
3. Fullen M, Myers D, **Rauscher KJ**, Lundstrom W, Takacs B\*, and Lundstrom E\*. (2019). Hazards Perceptions in the Logging Industry: Differences between Owners and Workers. *West Virginia University Extension Service Annual Conference*. Weston, WV.

**Invited Presentations*****National***

1. Bush D, Wermes A, **Rauscher KJ**, Myers D, and Chang C. (2017). Safe Students, Safe Workers: Construction Safety Programs in Post-Secondary Career Technical Education. *National Center for Construction Research and Training (CPWR) Webinar*.
2. Bush D, **Rauscher, KJ**, Chang C, and Myers D. (2017). OSH Education in Post-Secondary Career Technical Education Construction Programs. *r2p in Construction: From Research to Practice – The Impact. National Center for Construction Research and Training (CPWR)*. Cincinnati, OH.
3. Bush D, **Rauscher, KJ**, Chang C, and Myers D. (2017). Safe Students, Safe Workers: Tools and Resources for Construction Programs. *Skills USA National Leadership and Skills Conference*. Louisville, KY.
4. **Rauscher KJ**, Miller M, and Myers DJ. (2015). Young Worker Fatalities: An Investigation of Cases Involving Child Labor Violations: *Southeastern States Occupational Network (SouthON) Annual Meeting*. Lexington, KY.
5. **Rauscher KJ**. (2013). Factors Affecting Teachers' Adoption of the Youth@Work: Talking Safety Curriculum. *National Institute for Occupational Safety and Health*. Cincinnati, OH.
6. **Rauscher KJ** and Runyan CW. (2010). Workplace Hazards and the Child Labor Laws: How much do Teens and their Parents Know? *Child Labor Panel. Interstate Labor Standards Association Annual Meeting*. Big Sky, MT.
7. Runyan CW, Vladutiu C\*, Schulman M, and **Rauscher KJ**. (2010) Advising Adolescents about Work Safety: The Role of Parents. *Assuring Safe Workplaces for Young Workers Symposium. Society for Research on Adolescence Biennial Meeting*. Philadelphia, PA.
8. **Rauscher KJ** and Runyan CW. (2008). The Prevalence of Working Conditions Associated with Adolescent Occupational Injury in the United States. *Young Worker Symposium II: The Health Implications of Work among Youth*. University of North Carolina Injury Prevention Research Center. Chapel Hill, NC.

9. **Rauscher KJ.** (2008). Job Quality among Adolescent Workers: What Makes for a High-Quality Job for Adolescents and Are They out There? *Young Worker Safety Resource Center Meeting*. Education Development Center (EDC). Newton, MA.

#### Invited Moderator

1. **Rauscher KJ.** *Session Moderator.* (2018). Young Worker Injuries/Fatalities. *National Occupational Injury Research Symposium (NOIRS)*. National Institute for Occupational Safety and Health (NIOSH). Morgantown, WV. October 2018.
2. **Rauscher KJ.** *Webinar Moderator.* (2015). Work-Related Injuries Are Happening to Youth: Can We Make a Difference? Beatriz Pazos-Vautin and Sara Rattigan. *Children's Safety Network*.

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## RESEARCH GRANTS

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#### Active

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH)

Program: National Center for Construction Safety and Health Research and Translation

Applicant Center: National Center for Construction Research and Training (CPWR) (Cain C, PI)

Sub-project Title: *Evaluation and Improvement of the OSHA 10-Hour Construction Safety Training Program.*

Principal Investigators: Fullen M (contact) and **Rauscher K**

The objectives of this sub-project within the CPWR Research Core are to improve OSHA 10-hour construction safety training outcomes by modifying the current training approach based on new evidence generated by a large-scale study of OSHA Training Institute Education Center (OTIEC) authorized trainers and their trainees.

Project Period: 9/30/19 – 9/29/24

Budget: \$994,996

#### Completed

Grant #2U54OH007547-16

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH)

Program: Centers for Agricultural Safety and Health

Applicant Center: Southeast Center for Agricultural Health and Injury Prevention (Mannino D, PI)

Sub-project Title: *Timber-Safe: Reduction of WV Logging Hazards*

Principal Investigators: Fullen M (contact) and Myers D

The objectives of this sub-project within the University of Kentucky AgCenter Research Core were to develop, implement, and evaluate a Safety and Health Management System (SHMS) in West Virginia logging companies to reduce work injuries.

Project Period: 9/30/16 – 9/29/21 (role ended 10/19)

Budget: \$859,424

**Role: Co-Investigator**

Grant #1-R01-OH-010928-01

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH)

Program: RO1 Investigator-Initiated Research

Principal Investigators: **Rauscher K** (contact) and Casteel C.

Project Title: *Understanding Workplace Violence against Young Workers in the US*

The objectives of this study were to generate the first national profile of workplace violence among young workers ages 14-24 in the US.

Project Period: 9/30/15 - 9/29/19 (NCE)

Budget: \$1,277,765

Funder: Johns Hopkins University Occupational Health Education and Research Center/NIOSH

Program: Pilot Grant Program

Principal Investigators: Evans K (PhD student) and Myers D

Project Title: *An In-Depth Exploration of Hospital-Based Physical and Occupational Therapists' Needs, Perceptions and Involvement Regarding Safe Patient Handling and Mobility Programs*

The objectives of this study were to identify the special occupational health needs of physical and occupational therapists regarding safe patient handling.

Project Period: 1/1/19 – 6/30/19

Budget: \$6,000

**Role: Co-Investigator**

Grant #U60 OH009762

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH)

Program: National Center for Construction Research and Training

Applicant Center: National Center for Construction Research and Training (CPWR) (Stafford E, PI)

Sub-project Title: *OSH Education in Post-Secondary CTE Construction Programs*

Principal Investigators: Bush D (contact) and **Rauscher K**.

The objectives of this Research Core sub-project were to determine what constitutes effective health and safety education in post-secondary CTE construction programs.

Project Period: 9/1/14 – 12/31/17

Budget: \$816,000

Grant #3049025288-14-061

Funder: Southeast Center for Agricultural Health and Injury Prevention/NIOSH

Program: Pilot Research Grant Program

Principal Investigator: Fullen M.

Project Title: *West Virginia Logger Hazard Awareness and Injury Risk Perception*

The objective of this pilot project was to explore the hazard awareness and injury risk perceptions among loggers and logger owner operators in West Virginia.

Project Period: 10/01/13 – 9/29/14

Budget: \$14,998

**Role: Co-Investigator**

Grant #1-R49-CE000196-01-03

Funder: CDC/National Center for Injury Prevention and Control (NCIPC)

Program: National Centers for Excellence in Injury Prevention

Applicant Center: West Virginia University Injury Control Research Center (ICRC). (Coben J, PI)  
The Center's goals were to conduct injury prevention research, facilitate the translation of this research into practice, to train the next generation of researchers, and support the education of practice professionals.

Project Period: 8/01/12 - 7/31/17

Budget: \$4,527,500

**Role: Co-Investigator/Assistant Director for Research (role ended 2015)**

Grant #5-R03-OH009736

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH)

Program: R03 Investigator-Initiated Research

Principal Investigator: **Rauscher K.**

Project title: *Factors Affecting Teachers Adoption of Youth at Work Talking Safety Curriculum*

This objective of this national study was to identify the barriers and facilitators faced by high school teachers in adopting and sustaining a youth-oriented occupational safety and health curriculum.

Project Period: 9/01/11 - 8/31/13

Budget: \$120,250

Grant #5-R03-OH009557

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH)

Program: R03 Investigator-Initiated Research

Principal Investigators: **Rauscher K (contact)** and Myers D.

Project Title: *Occupational Health Literacy, Socioeconomic Status & Work-related Injury to Teens*

The objective of this study was to investigate the role of "occupational health literacy" as a determinant of work injury prevalence among young workers using survey data from high school students in four cities across the US.

Project Period: 9/01/09 - 8/31/11

Budget: \$162,120

Grant #5-R03-OH009437

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH)

Program: R03 Investigator-Initiated Research

Principal Investigator: **Rauscher K.**

Project Title: *Young Worker Fatalities and Violations of Labor and Safety Regulations*

The objectives of this population-based study were to examine the relationship between adolescent occupational fatalities and violations of the child labor laws and OSHA regulations in North Carolina over an 18-year period.

Project Period: 9/01/08 - 8/31/10

Budget: \$147,500

Grant #

Funder: CDC/National Institute for Occupational Safety and Health (NIOSH) and the Ontario Neurotrauma Foundation

Principal Investigator: Runyan C.

Project Title: *North American Young Workers Interdisciplinary Education Program.*

The objective of this project was to bring together a diverse group of scholars, practitioners, and policy makers from across the US and Canada to synthesize their understanding of the benefits and risks of youth employment.

Project Period: 8/31/06 - 8/31/10

Budget: \$368,652

**Role: Co-Investigator**

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## SERVICE & LEADERSHIP

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### Service to the Field

#### *Grant Application Reviewer*

2022 -	Member. Safety & Occupational Health Study Section. National Institute for Occupational Safety and Health. 4-year appointment.
2022, 2020, 2019, 2012, 2010	<i>ad hoc</i> Reviewer. Safety & Occupational Health Study Section. National Institute for Occupational Safety and Health.
2021, 2015, 2014	State-based Surveillance Special Emphasis Panel. Disease, Disability, & Injury Prevention and Control Special Emphasis Panel. National Institute for Occupational Safety and Health.
2020	Intramural Research Program. National Institute for Occupational Safety and Health.
2018	Occupational Safety and Health Education and Research Centers. Disease, Disability, & Injury Prevention and Control Special Emphasis Panel. National Institute for Occupational Safety and Health. Alexandria, VA.
2011	Agriculture Research Center Program. Disease, Disability, & Injury Prevention and Control Special Emphasis Panel. National Institute for Occupational Safety and Health. Philadelphia, PA.
2010, 2009	R2P and Construction Safety Research Program. Disease, Disability, & Injury Prevention and Control Special Emphasis Panel. National Institute for Occupational Safety and Health.



2008 Graduate Student Small Research Grant Program. University of North Carolina at Chapel Hill. Injury Prevention Research Center.

***Leadership/Subject Matter Expert Contributions***

2020 - 2021 Member. Working Group on Young Worker Safety Question Development for the Youth Risk Behavior Surveillance System (YRBSS)

2020 - 2022 Member. Idaho Youth Alliance for Technical and Career Services High Schools.

2019, 2016, 2013 Pre-publication manuscript reviewer. National Institute for Occupational Safety and Health

2015 Pre-publication report reviewer. Rand Corporation

2011 Co-leader. Best Practices in Policy. Creating Safe Futures: World Day Against Child Labour Workshop. International Labour Organization.

2006 - 2010 Member. Joint Organizing Group. Young Workers Interdisciplinary Education Program in the US and Canada. University of North Carolina Injury Prevention Research Center and Laurentian University.

2002 – 2004 Member. Massachusetts Task Force on Young Worker Health and Safety.

1998 - Member. National Young Worker Health and Safety Network.

***Editorial Boards***

2019 - Member. Workplace Health and Safety

***ad hoc Manuscript Reviewer***

- American Journal of Industrial Medicine
- American Journal of Public Health
- Archives of Environmental and Occupational Health
- BMC Public Health
- Economic and Industrial Democracy
- Industrial Health
- Injury Prevention
- International Journal of Injury Control and Safety Promotion
- International Journal of Public Health
- International Journal of Occ and Environ Health
- Journal of Adolescent Health
- Journal of Agricultural Safety and Health
- Journal of Agromedicine
- Journal of Epidemiology and Community Health
- Journal of Occupational and Environmental Medicine
- Journal of Occupational and Environmental Hygiene
- Journal of Safety Research
- New Solutions: A Journal of Environmental and Occupational Health Policy
- Occupational and Environmental Medicine
- Safety and Health at Work
- Safety Science
- Social Currents
- Substance Use and Misuse
- The Sociological Quarterly
- Youth and Society

*Scientific Conference Activities*

2021, 2012, 2011	Abstract Reviewer. American Public Health Association Annual Meeting. Occupational Health and Safety Section.
2019	Poster Session Judge. Student/Early Researcher Poster Competition. American Public Health Association Annual Meeting. Occupational Health and Safety Section. Philadelphia, PA.
2017, 2016	Scholarship Reviewer. James P. Keogh Scholarship Program. American Public Health Association. OSH Section.
2012	Abstract Reviewer. 11 <sup>th</sup> World Conference on Injury Prevention and Safety Promotion. World Health Organization. Wellington, NZ.
2011	Abstract Reviewer. National Occupational Injury Research Symposium. National Institute for Occupational Safety and Health. Morgantown, WV.
2010, 2013	Abstract Reviewer. National Meeting of the Safe States Alliance and the Society for the Advancement of Violence and Injury Research (SAVIR).

*Public Comment/Testimony*

2013	Written comment to the US DHHS in response to the “Request for Comment Regarding the Stage 3 Definition of Meaningful Use of Electronic Health Records.”
2011	Written comment to the US Department of Labor on proposed rule changes under the Fair Labor Standards Act regarding hazardous jobs for minors in Agriculture. Contributor, submitted on behalf of the National Young Worker Health and Safety Network.
2009	Oral Testimony to the NC House of Representatives Commerce Committee. Hearing on amending penalties for violations of child labor provisions of the NC Wage & Hour Act.
2007	Written Comment to the US Department of Labor on proposed rule changes under the Fair Labor Standards Act regarding hazardous jobs for minors. Co-author, submitted on behalf of the National Young Worker Health and Safety Network.
2006	Written Comment to the US Department of Labor on the design of federal Youth Build program grants. Co-author, submitted on behalf of the UNC Injury Prevention Research Center.

**Service to Boise State University*****Leadership***

2019 - Emphasis Coordinator. Undergraduate Emphasis in Environmental and Occupational Health Sciences. School of Public and Population Health

***Committees***

2021 - Undergraduate Curriculum Committee. College of Health Sciences.

2020 - 2021 Research Committee. College of Health Sciences.

2019 - Undergraduate Curriculum Committee. School of Public and Population Health

2022, 2021, 2020, 2019 *ad hoc* Hiring Committee. School of Public and Population Health (formerly the Department of Public Health and Population Science)

***Poster Session Judge***

2021 Graduate Student Showcase. Boise State University.

**Service to West Virginia University*****Leadership***

2017 – 2018 Director. Public Health Sciences PhD Program. School of Public Health.

2015 – 2016 MPH Program Coordinator. Department of Occupational and Environmental Health Sciences. School of Public Health.

2013 – 2015 Assistant Director for Research. West Virginia University Injury Control Research Center.

***Committees***

2018 – 2019 Chair. Academic and Professional Standards Committee. School of Public Health.

2018 – 2019 Member. Health Sciences Center Committee on Women in Science and Health. (WISH)

2015 – 2018 Member. Research Advisory Council. School of Public Health.

2015 – 2017 Member. Health Sciences Center Graduate Council.

2016 – 2018 Member. Promotion and Tenure Committee. School of Public Health.

2015 – 2017	Member. Academic Affairs Committee. School of Public Health.
2015	Member. Center Director Search Committee. West Virginia Univ. Injury Control Research Center.
2015	Chair. PhD Program Planning Committee. Department of Occupational and Environmental Health Sciences. School of Public Health.
2015	Member. Faculty Mentoring Program Development Committee. School of Public Health.
2015 - 2016	Chair ( <i>Member 2014-2015</i> ). MPH Admissions Committee. Department of Occupational and Environmental Health Sciences. School of Public Health.
2013 - 2016	Member ( <i>elected</i> ). Health Sciences Center Vice President's Faculty Advisory Council. School of Public Health Caucus.
2013 - 2015	Member. Curriculum Committee. School of Public Health.
2012 - 2015	Member. Faculty Development Committee. Health Sciences Center.
2011 - 2014	Member. Strategic Planning Committee-Research Subcommittee. School of Public Health.
2011 - 2012	Member. Multi-faculty Search Committee. School of Public Health.
2011	Member. Outreach Coord. Search Committee. West Virginia Univ Injury Control Research Center.
2010 - 2011	Member. Promotion and Tenure Committee. Department of Community Medicine.
2010 - 2011	Member. Biostatistician Faculty Search Committee. Department of Community Medicine.

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## TEACHING/MENTORING

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### Boise State University

#### *Didactic Courses (# of students)*

Fall 2022 (96)	EOHS 230 Healthy Environments, Healthy People (Formerly Introduction to Environmental Health) (15 weeks). School of Public and Population Health. College of Health Sciences.
Spring 2022 (88)	
Fall 2021 (44)	
Spring 2021 (46)	
Fall 2020 (27)	

Summer 2022 (18) EOHS 230 Introduction to Environmental Health (7 weeks). School of Public  
Spring 2021 (30) and Population Health. College of Health Sciences.

Fall 2021 (6) EOHS 479 Seminar (15 weeks). School of Public and Population Health.  
College of Health Sciences.

Spring 2021 (5) MPH 598 Seminar (7 weeks). School of Public and Population Health. College  
of Health Sciences.

#### ***Dissertation Committees***

2021 - Chair. Jennifer Fuller. Department of Occupational and Environmental Health  
Sciences. School of Public Health. Dissertation topic: *Workplace Violence  
Training among Young Workers*

2017 - 2021 Member. Kimeran Evans. Department of Occupational and Environmental  
Health Sciences. School of Public Health. Dissertation title: *Adoption of  
Manual Lift Equipment among Nurses and Physical/Occupational Therapists.*

#### ***Master's Thesis Committees***

Spring 2022 - Committee Chair. Camryn Lopez. MPH Candidate. School of Public and  
Population Health. College of Health Sciences. Thesis: *The Role of Implicit  
Bias in Supervisor Treatment of Young Minority Workers*

#### ***Graduate Research Assistants***

Fall 2022- Verena Wolf. Graduate Intern. MPH Student. School of Public Health.  
University of Illinois, Chicago.

Fall 2021 – Spring Camryn Lopez. MPH Student. School of Public and Population Health. College  
2022 of Health Sciences.

#### ***Undergraduate Advisees***

2021-22 (6) BS Emphasis in Environmental and Occupational Health Sciences. School of  
2020-21 (4) Public and Population Health. College of Health Sciences.

#### **West Virginia University**

#### ***Recognitions***

2016 Nominee. Excellence in Teaching Award. West Virginia University Injury  
Control Research Center.

***Didactic Courses (# of students)***

Fall 2016 (3)	OEHS 629 Capstone ( <i>culminating experience for MPH students</i> ). Department of Occupational and Environmental Health Sciences. School of Public Health.
Spring 2016 (4)	
Fall 2015 (2)	
Fall 2016 (9)	
Fall 2015 (10)	OEHS 623/732 Understanding and Preventing Occupational Injury. Department of Occupational and Environmental Health Sciences. School of Public Health.
Fall 2014 (9)	
Fall 2013 (12)	OEHS 732 Understanding and Preventing Occupational Injury. Department of Community Medicine. School of Public Health.
Fall 2012 (7)	
Fall 2011 (11)	
Spring 2011 (19)	PUBH 796 PhD Graduate Seminar. Department of Community Medicine. School of Medicine.

***Independent Studies***

Spring 2016	OEHS 695 Independent Study. Lauren Branch. PhD student. Department of Occupational and Environmental Health Sciences. School of Public Health.
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***Teaching Practicums***

Fall 2016	OEHS 790 Teaching Practicum. Brandy Brown. PhD student. Department of Occupational and Environmental Health Sciences. School of Public Health.
Fall 2014	OEHS 790 Teaching Practicum. Katelyn Siegrist. PhD student. Department of Occupational and Environmental Health Sciences. School of Public Health.

***Research Rotations***

2017	Kimeran Evans. PhD student. Department of Occupational and Environmental Health Sciences. School of Public Health.
2015	Brandy Brown. PhD student. Department of Occupational and Environmental Health Sciences. School of Public Health.

***Dissertation Committees***

2016 - 2020	Chair. Brandy Brown. Department of Occupational and Environmental Health Sciences. School of Public Health. Dissertation topic: <i>Preventing Workplace Violence among Teenaged Workers and the Role of the School Nurse</i> .
2015 – 2017	Member. Lauren Branch. Department of Occupational and Environmental Health Sciences. School of Public Health. Dissertation topic: <i>Impacts of Cyber Threats on Hospital Emergency Preparedness and Public Health</i> .

***Graduate Research Assistants***

2016 – 2017	Brandy Brown. PhD student. Department of Occupational and Environmental Health Sciences. School of Public Health.
2015 – 2016	Jefferey Goodman. MPH student. Department of Occupational and Environmental Health Sciences. School of Public Health.
2015 – 2016	Karen Sitter. MPH student. Department of Occupational and Environmental Health Sciences. School of Public Health.
2012	Kestrel Inness-Wimsatt. MPH student. Department of Occupational and Environmental Health Sciences. School of Public Health.
2012	Rami Katrib. MPH student. Department of Occupational and Environmental Health Sciences. School of Public Health.
2010 – 2012	Rozelinda Junkin. MPH student. Department of Community Medicine. School of Medicine.

***Graduate Program Advising***

2018 - 2019	Departmental Advisor (4 students). Doctoral Program in Public Health Sciences. Department of Occupational and Environmental Health Sciences.
2016 – 2017	Departmental Advisor (8 students). Master of Public Health Program. Department of Occupational and Environmental Health Sciences.

***MPH Advisees***

2015	Katelyn Bennett. Department of Occupational and Environmental Health Sciences. School of Public Health.
2014 - 2015	Tanner Coles. Department of Occupational and Environmental Health Sciences. School of Public Health.
2014	Chris Skinner. Department of Occupational and Environmental Health Sciences. School of Public Health.
2013 - 2014	Esther Acheampong. Department of Occupational and Environmental Health Sciences. School of Public Health.
2012 - 2014	Lauren Branch. Department of Occupational and Environmental Health Sciences. School of Public Health.

## CURRICULUM VITAE

### Miguel Reina Ortiz MD, MS, MPH, PhD, CPH

Associate Professor  
School of Public and Population Health  
Boise State University

Mailing Address: 1910 University Drive, Boise, ID, 83725  
Email: miguelreinaortiz@boisestate.edu  
Phone: (208) 426-3929  
ORCID iD: <https://orcid.org/0000-0003-3309-6881>

## RESEARCH FOCUS AND EXPERTISE

Global Health scientist interested on the application of behavioral economics, informed by community-engaged research, to the development of culturally appropriate, effective, and efficient HIV prevention strategies, with a focus on vulnerable and minoritized populations. My research also aims at generating evidence to improve Disaster Preparedness, Management, and Mitigation, with a focus on disaster-related infectious disease dynamics. My studies address the dynamic relationship between infectious agents, their hosts, and the environment in which these interactions occur. I am also interested in understanding and contributing to the international dialogue on disease prevention, including international binding and non-binding instruments and their negotiation and application through Global Health Diplomacy. My previous research and scholarly activities have been done in a variety of countries, ranging from Ecuador, Costa Rica, and Nicaragua in Latin America to the United States in North America to India and Nepal in South Asia. In terms of research methods, expertise includes quantitative and qualitative approaches, in addition to specialized techniques such as the use of Geographic Information Systems-based techniques applied to health issues. Professional expertise includes clinical care in international settings, leadership positions in overseas healthcare units, as well as coordination, supervision, and collaboration in interdisciplinary teams at international level.

## EDUCATION

### Harvard University

Harvard University School of Medicine  
Global Clinical Scholars Research Training

Expected culmination July 2023

### University of South Florida

Department of Global Health, College of Public Health  
PhD, Public Health. Concentration in Global Communicable Disease

Tampa, FL

Aug 8, 2015

- Effect of Timely Treatment on Malaria Gametocytemia in Esmeraldas, Ecuador





<b>University of South Florida</b> Department of Epidemiology and Biostatistics, College of Public Health Graduate Certificate in Applied Biostatistics	<b>Tampa, FL</b>	Dec 2014
<b>University of South Florida</b> Department of Global Health, College of Public Health Graduate Certificate in Global Health Practice	<b>Tampa, FL</b>	Apr 2013
<b>The Hebrew University of Jerusalem</b> The Braun School of Public Health and Community Medicine MPH – <b>Fertility Treatment and offspring health outcomes.</b>	<b>Jerusalem, Israel</b>	Sep 2011
<b>Universidad San Francisco de Quito</b> Institute of Microbiology	<b>Quito, Ecuador</b>	Jun 2009

MS. Concentration in Microbiology – **Modified Th2 response in helminth infections**

Universidad Central del Ecuador  
School of Medicine  
MD – **Graduated with honors**

Quito, Ecuador

Sep 2004

## PROFESSIONAL CERTIFICATIONS

2019 – present            Certified in Public Health (CPH). **National Board of Public Health Examiners.**

## ACADEMIC AND PROFESSIONAL EXPERIENCE

### Academic experience

2022 - present            Associate Professor. School of Public and Population Health, College of Health Sciences, Boise State University.

2022 – present            Collaborative appointment as an Associate Professor. College of Public Health, University of South Florida.

2021 – 2022                Associate Professor. College of Public Health, University of South Florida.

2015 – 2021                Assistant Professor. College of Public Health, University of South Florida.

2012 – 2015                Teaching Assistant and Instructor for several undergraduate and graduate courses in the College of Public Health, University of South Florida (Please see the section titled “Teaching and Mentoring Experience”)

2009 – 2011                Instructor for the course of Research Methods (Graduate Level). Dermatology Postgraduate Residency Program. Universidad Central del Ecuador. Quito, Ecuador.

2009 – 2011                Thesis Mentor. Dermatology Postgraduate Residency Program. Universidad Central del Ecuador. Quito, Ecuador.

2009 – 2010                Instructor for undergraduate courses (Schools of Medicine, Odontology, Nursing and Physiotherapy). Universidad de las Americas. Quito, Ecuador.

2008                         Co-organizer and Lecturer of the Helminthology course (Graduate Level). Master of Microbiology Program. Pontificia Universidad Católica del Ecuador. Spring, 2008.

### Affiliate and Courtesy appointments

2016 – 2018                Affiliate Researcher/Faculty. Universidad San Francisco de Quito. Quito, Ecuador.

### Professional experience

2011                         Technical Director of Quality, Clinical Diagnostic Laboratory, Hospital Delfina Torres de Concha. Esmeraldas, Ecuador.

2009 – 2010                Clinical Trial Monitor. Roche Ecuador S.A. Quito, Ecuador.

2009 Resident Medical Doctor / Hospital Epidemiologist. Maternidad Virgen de la Buena Esperanza (Obstetrics Hospital). Esmeraldas, Ecuador.

2004 – 2005 Director. Sub-Centro de Salud Tachina – Maternal and Child / Primary Healthcare Center. Esmeraldas, Ecuador.

#### Consultancies

2021 – 2022 Consultant for a Project – Developing Vector Borne-related GIS training for The Caribbean Public Health Agency (CARPHA).

2009 Consultant for Fundacion Natura Ecuador. Quito, Ecuador.

#### FELLOWSHIPS

2018 Abshire-Inamori Leadership Academy International Fellowship Fall 2018. **Center for Strategic and International Studies (CSIS)**. Washington DC, USA. September 24<sup>th</sup> to September 28<sup>th</sup>, 2018.

#### SPECIALIZED TRAININGS

2021 Burden of Disease Training School. **Burden EU – European Burden of Disease Network**. European Cooperation in Science and Technology – COST Action CA18218. September 10, 17 and 24, 2021.



- 2021 Behavioral Economics Virtual. **Harvard Business School Executive Education, Harvard University**. October 18-29, 2021.
- 2019 Independent Applying the QM Rubric (APPQMR). **Quality Matters**. January 25, 2019.
- 2015 International Rapid Assessment, Response and Evaluation (I-RARE). I-RARE Research Team. Department of Community and Family Health, College of Public Health, **University of South Florida**. January 29, 30 and 31, 2015
- 2010 Course on Bioethics (V Curso de Introducción a la Ética de la Investigación en Seres Humanos). **Red Bioética UNESCO**. Buenos Aires, Argentina (on line activity). May to December, 2010.

## RESEARCH AND SCHOLARLY ACTIVITIES

### Peer-reviewed publications

*Italics* for student authors, \* = community partner, + = corresponding author

1. Charalompous P, Pallari E, ..., **Reina Ortiz M**, ... Haagsma J. Methodological considerations in injury burden of disease studies across Europe: a systematic literature review. *BMC Public Health* 2022; 22:1564. DOI: <https://doi.org/10.1186/s12889-022-13925-z>
2. **Reina Ortiz M+**, Grunauer M, Gutierrez E, Izurieta R, Rosas C, Macis M, Phan P, Teran E. Financial incentives, not behavioral nudges, led to optimized HIV testing among pregnant women in a high burden urban population in Ecuador. *American Journal of Tropical Medicine & Hygiene* 2022; on-line ahead of print. DOI: 10.4269/ajtmh.21-0591.
3. Pullia A, Jeemi Z, **Reina Ortiz M**, Dantas JAR. Physical Activity Experiences of South Asian Migrant Women in Western Australia: Implications for Intervention Development. *International Journal of Environmental Research and Public Health* 2022; 19 (6):3585. DOI: 10.3390/ijerph19063585.
4. Charalompous P, Gorasso V, ... The COST Action CA18218 Participants (inc. Miguel **Reina Ortiz**). Burden of non-communicable disease studies in Europe: a systematic review of data sources and methodological choices. *European Journal of Public Health* 2022; 1-8. DOI:10.1093/eurpub/ckab218.
5. Peñalvo JL, Mertens E, .... **Reina Ortiz M**, ... on behalf of the unCoVer network. Unravelling data for rapid evidence- based response to COVID-19: a summary of the unCoVer protocol. *BMJ Open* 2021; 11 (11): 1-11. DOI: 11:e055630. doi:10.1136/bmjopen-2021-055630.
6. *Le NK, Panchang S*, Izurieta A, **Reina Ortiz M**, Hoare I, Naik E, Espinel M, Teran E, Izurieta R. Fostering East-West and North-South bidirectional collaborations: Experiences from the First International Congress on Ecology and Evolution of Global Communicable Diseases held in Quito and the Galapagos Islands, Ecuador. *International Journal of Academic Medicine* 2021; 7(3):137-140.



7. Marhefka S, Lockhart E, Chen H, Meng H, **Reina Ortiz M**, Powell B, Shuter J. A tailored telehealth group tobacco cessation treatment program for people with HIV: Study Protocol for a Randomized Controlled Trial. *Contemporary Clinical Trials* 2021; 110:106475. DOI: 10.1016/j.cct.2021.106475.
8. Rafieifar M, Naseh M, Potocky M, Zajicek-Farber ML, Kim W, Padilla B, **Reina Ortiz M**, Lopez JA\*. Impacts of COVID-19 on refugees and immigrants in the United States: A call for action. *International Social Work* 2021; 64(5):771-776. DOI: [10.1177/00208728211017964](https://doi.org/10.1177/00208728211017964) [brief note].
9. **Reina Ortiz M**, Sharma V, Hoare I, Casanova J, Corvin J. Developing Global Health Diplomacy-related Skills Using a COVID-19-like Epidemic Simulation as a Learning Strategy. *American Journal of Tropical Medicine & Hygiene* 2021; 105(1):59-65. DOI: <https://doi.org/10.4269/ajtmh.21-0155>
10. Macis M, Grunauer M, Izurieta R, Phan P, **Reina Ortiz M**, Rosas C, Teran E. Using Incentives and Nudging to Improve Non-Targeted HIV Testing in Ecuador: A Randomized Trial. *AIDS and Behavior* 2021; 25:2542-2550. DOI: <https://doi.org/10.1007/s10461-021-03215-x>
11. Hernandez I, Sharma V, **Reina-Ortiz M**, Rosas C, Ochoa T, Teran S, Izurieta R, Teran E. HIV/AIDS-related Knowledge and Behavior among School-attending Afro-Descendant Youths in Ecuador. *International Journal of Maternal and Child Health and AIDS* 2020; 9(3):397-407. DOI: <https://doi.org/10.21106/ijma.412>
12. Shakya DR, Thapa SB, Kar SK, Sharma V, Uchida N, **Reina Ortiz M**, Poudel CK, Bhattarai PR. COVID-19 across countries: Situation and Lessons for Pandemic Control. *Journal of the BP Koirala Institute of Health Sciences* 2020; 3:9-27. DOI: <https://doi.org/10.3126/jbpih.v3i1.30311>
13. **Reina Ortiz M**, Grijalva MJ, Turell MJ, Waters WF, Carrazco A, Mathias D, Sharma V, Fierro C, Leon R. Biosafety-at-home: how to translate biomedical laboratory safety precaution measures for everyday use in the context of COVID-19. *The American Journal of Tropical Medicine & Hygiene* 2020; 103(2):838-840. DOI: <https://doi.org/10.4269/ajtmh.20-0677>
14. Sharma V, **Reina Ortiz M**, Sharma N. Risk and Protective Factors for Adolescent and Young Adult Mental Health Within the Context of COVID-19: A Perspective From Nepal. *Journal of Adolescent Health* 2020; 67: 135-137. DOI: <https://doi.org/10.1016/j.jadohealth.2020.04.006> [Letter to the Editor].
15. *Chee V*, Teran E, Hernandez I, Wright L, Izurieta R, **Reina-Ortiz M**, Flores M, Bejarano S, Baldwin J, Martinez-Tyson D. 'Desculturización', urbanization and the nutrition transition among urban Kichwa indigenous communities residing in the Andes highlands of Ecuador. *Public Health* 2019; 176:21-28. DOI: <https://doi.org/10.1016/j.puhe.2019.07.015>
16. Sharma V, **Reina Ortiz M**. A holistic approach to redefining Nepal's health-care system. *The Lancet Global Health* 2019; 7 (3):PE305. DOI: [https://doi.org/10.1016/S2214-109X\(18\)30530-8](https://doi.org/10.1016/S2214-109X(18)30530-8) [Correspondence].



17. *Dao L, Teran E, Bejarano S, Hernandez I, Reina Ortiz M, Chee V, Flores M, Izurieta R, Baldwin J, Martinez Tyson D.* Risk and Resiliency: The Syndemic Nature of HIV/AIDS in the Indigenous Highland Communities of Ecuador. *Public Health* 2019; 176:36-42. DOI: <https://doi.org/10.1016/j.puhe.2019.02.021>
18. Hernandez I, **Reina-Ortiz M**, *Adegoke K, Ochoa T, Rosas C, Sharma V, ... Teran E.* Risk factors for HIV and STI among female sex workers in a high HIV prevalent region of Ecuador. *Cogent Medicine* 2019; 6:156292. DOI: <https://doi.org/10.1080/2331205X.2019.1565292>
19. Arquilla B, Bloem C, Izurieta R, Jeanmonod D, Jeanmonod RK, Nanda S, Daniel P, Papadimos TJ, **Reina Ortiz M**, Garg M, Firstenberg MS, Galwankar SC, DeWulf AL, Peck GL, Sifri ZC, Stawicki SP. The Third Annual Academic International Medicine World Congress (AIM 2018) “Translating Evidence into Global Innovation” in Brooklyn, New York, July 27-29, 2018: Event Highlights and Scientific Forum Abstracts. *International Journal of Academic Medicine* 2018; 4(3):310-337. [Conference Proceedings].
20. *Black G, Hasenkamp E, Johnson N, Izurieta R, Ianiro R, Reina Ortiz M+.* Concern and attitudes toward Zika virus in Jarabacoa, Dominican Republic : A cross-sectional study. *Global Journal of Health Science* 2018; 10(12):1-11. DOI: <https://doi.org/10.5539/gjhs.v10n12p1>
21. Martinez Tyson D, Terán E, *Dao L, Chee V, Hernandez I, Flores M, Reina-Ortiz M, Izurieta R, Baldwin JA.* “Cancer is in style here”: Lifestyle change and the perceived impact of globalization on Andean indigenous communities in Ecuador. *Ethnicity & Health* 2021; 26(2):153-167 (published online Epub ahead of print in 2018). DOI: <https://doi.org/10.1080/13557858.2018.1493437>
22. Izurieta R, *DeLacure D, Izurieta A, Hoare I, Reina-Ortiz M.* Mayaro Virus: The Jungle Flu. *Virus Adaptation and Treatment* 2018; 10:9-7. DOI: <https://doi.org/10.2147/VAAT.S128711> [Review Article].
23. **Reina Ortiz M**, *Le N, Sharma V, Hoare I, Quizhpe E, Terán E ... Izurieta R.* Post-Earthquake Zika virus surge: Disaster and public health threat amid climatic conduciveness. *Scientific Reports* 2017; 7(1):14508. DOI: <https://doi.org/10.1038/s41598-017-15706-w>
24. Hernandez I, **Reina Ortiz M**, *Johnson A, Rosas C, Sharma V, Teran S, ... Izurieta R.* Risk Factors Associated with HIV among Men Who Have Sex With Men (MSM) in Ecuador [Epub ahead of print]. *American Journal of Men’s Health* 2017; 11(5):1331-1341. (Published online before print May 8, 2016). DOI: <https://doi.org/10.1177/1557988316646757>
25. Hernandez I, *Johnson A, Reina Ortiz M, Rosas C, Sharma V, Terán S, ... Teran E.* Syphilis and HIV/Syphilis co-infection among Men who have Sex with Men (MSM) in Ecuador. *American Journal of Men’s Health* 2017; 11(4):823-833. (Published online before print Dec 5, 2016). DOI: <https://doi.org/10.1177/1557988316680928>
26. **Reina Ortiz M,+** *Sharma V, Izurieta R.* HIV Prevalence in Asia and the Pacific: an Ecological Approach to Inequalities in the Region. *Health and the Environment Journal* 2012; 3(3):66-77.



27. **Reina Ortiz M**, Schreiber F, Benitez S, et al. Effects of Chronic Ascariasis and Trichuriasis on cytokine production and gene expression in human blood: A Cross-Sectional Study. *PLoS Neglected Tropical Diseases* 2011; 5 (6):e1157. DOI: <https://doi.org/10.1371/journal.pntd.0001157>
28. **Reina Ortiz M**,+ Cárdenas P, Arias M. “Fiebre por Dengue asociada a colecistitis alitiásica” (Dengue Fever associated with acalculous cholecystitis). *Rev Fac Cien Med (Quito)* 2009; 34: 46-49. [Case Report]

#### Editorials in peer-reviewed journals

29. **Reina Ortiz M**.+ Enfermedades Infecciosas: Un reto que persiste. *Rev Fac Cien Med (Quito)* 2012; 37: 5-8.
30. **Reina Ortiz M**, Sharma V, Hoare I, Izurieta R. State of the Globe: Ebola Outbreak in the Western World: Are We Really Ready? *J Glob Infect Dis* 2015; 7(2):53-5.
31. **Reina Ortiz M**,+ Sharma V, Hoare I, Izurieta R. Virus del Ébola: reflexiones sobre la reciente epidemia. *Rev Med Vozandes* 2014; 25 (1):3-4.
32. **Reina Ortiz M**.+ Los diseños de investigación. *Revista Médica Voz Andes* 2012; 23 (2):95-6.

#### Peer-reviewed abstracts published in peer-reviewed journals

*Italics* for student authors

33. *Le NK (student first-author)*, **Reina Ortiz M**, Hernandez I, Rosas C, Sharma V, Teran S, Naik E, Salihu HM, Teran E, Izurieta R. Risky Sexual Behaviors Associated with Human Immunodeficiency Virus Transmission among Pregnant Ecuadoreans. Abstract Number 25. *International Journal of Academic Medicine* 2018; 4(3):334.
34. *Sharma V (student first-author)*, **Reina Ortiz M**, Marhefka S. Post-earthquake HIV risk and mental health: Perceived inequities and resilience among adolescents in Nepal. *Journal of Adolescent Health* 2018; 62:S109.
35. *Chee V (student first-author)*, Wright I, Hernandez I, **Reina-Ortiz M**, *Bejarano S*, Flores M, Teran E, Izurieta R, Baldwin J, Martinez-Tyson D. SUN-P180: “La Desculturización”: Perceptions on Traditional Diet and Nutritional Transition Among Indigenous Communities of Ecuador. *Clinical Nutrition* 2017; 36(1):S120.
36. Hernandez I, **Reina M**, Rosas C, Sharma V, Izurieta R, Teran E. Predictors of HIV-related knowledge and risk behavior among school-attending teenagers in Esmeraldas, Ecuador. *Tropical Medicine & International Health* 2015; 20 (Suppl. I):285.
37. Hernandez I, *Adegoke K*, Rosas C, Ochoa T, **Reina M**, Sharma V, Izurieta R, Teran E. Prevalence of STI/HIV and factors associated with STI among female sex workers in Ecuador. *Tropical Medicine & International Health* 2015; 20 (Suppl. I):285.



38. **Reina Ortiz M**, Sharma V, Izurieta R. Geographic Information System-based modeling of the HIV/AIDS epidemic in Ecuador using nationally collected data. *The American Journal of Tropical Medicine and Hygiene* 2015; 93 (4\_Suppl):145 (484).

#### Manuscripts under peer-review/in submission process

*Italics for student authors*

1. **Reina Ortiz M**, *Chacreton D, Lara D*, Hoare I, Izurieta R. Impact of Hurricane Irma on Arboviral Transmission in Florida. To be submitted to MMWR.
2. **Reina Ortiz M**, *Patel J*, Hernandez I, Flores M, *Bejarano S, Chee V*, Teran E, Izurieta R, Baldwin J, Martinez Tyson D. Using Geographic Information Systems to enhance understanding of community assets: The GECAM methodology. To be submitted to the American Journal of Public Health.

#### Preprints

*Italics for student authors*

1. **Reina Ortiz M**, Sharma V. Modeling the COVID-19 outbreak in Ecuador: Is it the right time to lift social distancing containment measures? **Note:** available as a preprint on Medrxiv: <https://www.medrxiv.org/content/10.1101/2020.05.21.20109520v1>
2. *Le NK (student first-author)*, Le A, *Brooks JP*, *Khetpal S*, *Liauw D*, Izurieta R, **Reina Ortiz M**. Impact of government-imposed social distancing measures on COVID-19 morbidity and mortality around the world. Submitted to the Bulletin of the World Health Organization. **Note:** available as a preprint on: [https://www.who.int/bulletin/online\\_first/20-262659.pdf](https://www.who.int/bulletin/online_first/20-262659.pdf)

#### Books (Co-editor)

1. Masys A, Izurieta R, **Reina Ortiz M** (Eds). *Global Health Security: Recognizing Vulnerabilities, Creating Opportunities*. Springer International Publishing. Springer Nature. doi: 10.1007/978-3-030-23491-1. eBook ISBN: 978-3-030-23491-1. Hardcover ISBN: 978-3-030-23490-4.

#### Books (Textbook Chapters)

1. Izurieta R, **Reina Ortiz M**, Ochoa-Capello T. 2018. *Trichuris trichiura* (on line). In: J.B. Rose and B. Jiménez-Cisneros, (eds) *Global Water Pathogen Project*. <http://www.waterpathogens.org> (Robertson, L (eds) Part III: Specific Excreted Pathogens – Section IV Helminths) <http://www.waterpathogens.org/book/trichuris-trichiura> Michigan State University, E. Lansing, MI, UNESCO. doi: <https://doi.org/10.14321/waterpathogens.43>  
Acknowledgements: K.R.L. Young, Project Design editor; Website Design (<http://www.agroknow.com>)
2. **Reina Ortiz M**. Zika Virus: An emerging threat. In: Izurieta R (ed) *Emerging Infectious Diseases*. 2018. <https://tophat.com/marketplace/science-&-math/biology/textbooks/emerging-infectious-diseases-ricardo-izurieta-ismael-hoare/3229/110186/>





### Reports

1. Paudel D, Melendez KA, Chacreton D, Das TK, **Reina Ortiz M**, Kwon C. Measuring the Impact of the Large-scale Adoption of Ridesharing on the Spread of Infectious Diseases. Center for Transportation, Environment, and Community Health Final Report. Published: Mar 31, 2021.
2. HIV Syndemics Research Team. 2017. Indigenous Health & HIV. Executive Summary: Imbabura, Ecuador. The Syndemic Nature of HIV/AIDS Among Indigenous Populations in Latin America: Risk and Resilience.

### Oral and Poster Presentations in Scientific/Academic Conferences

*Italics* for student authors, underlined for community partner authors, \* = presenting author, + = corresponding author

1. **Reina Ortiz M**, *Gertz A*, *Saint-Cyr N*, Vasquez M, Wint K, Francois MJ, Chen H, Martinez Tyson D, Marhefka S, Thirumurthy. Systematic Literature Review of Traditional Economic Approaches to Improve Retention in Care for HIV (RICH). Accepted for poster presentation in the American Public Health Association (APHA) 2022 Annual Meeting & Expo. To be held in Boston, MA on Nov 6-9, 2022.
2. *Chipman C*, *Carattini I*, Silva-Sobrinho R, Reina Ortiz M, Hoare I. Effect of SARS-CoV-2 Prevention Measures on Mental and Financial the Health Parana, Brazil. Accepted for poster presentation in the American Public Health Association (APHA) 2022 Annual Meeting & Expo. To be held in Boston, MA on Nov 6-9, 2022.
3. *Hernández S*, *Garza C*, Martinez Tyson D, Izurieta R, Reina Ortiz M, Salinas A, Hoare I, Calvo A. Salud Latina USF Webinar Series Evaluation. Accepted for poster presentation in the American Public Health Association (APHA) 2022 Annual Meeting & Expo. To be held in Boston, MA on Nov 6-9, 2022.
4. **Reina Ortiz M\***, *Gertz A*, *Saynt-Cyr N*, Vasquez M, Wint K, Francois MJ, Chen H, Martinez Tyson D, Marhefka-Day S, Thirumurthy H. Leveraging Economics to optimize retention in Care for HIV: A Systematic Review. Accepted for Poster Presentation at the American Society of Tropical Medicine & Hygiene (ASTMH) 2022 Annual Meeting to be held in Seattle, Washington on Oct 30-Nov 3, 2022.
5. *Gertz A*, *Saint-Cyr N*, Vasquez M, Wint K, Francois MJ, Chen H, Martinez Tyson D, Marhefka S, Thirumurthy H, **Reina Ortiz M.\*** I do not need to be [intrinsically] motivated: Feasibility and acceptability of a behavioral economics-based intervention to optimize retention in HIV Care among Latinos Living with HIV in Florida. Accepted for presentation in the Fast-Track Cities 2022 Conference. To be held in Seville, Spain on October 11-13, 2022.
6. Saint-Cyr N, Gertz A, **Reina Ortiz M**,+ Vasquez M, Wint K, Francois MJ, Henian C, Martinez Tyson D, Phan P, Macis M, Marhefka S, Thirumurthy H. Incentive-based Interventions to Improve HIV Prevention/Control: a Scoping Review. Accepted for presentation in the 2022 Orange County Ending the HIV Epidemic Summit. To be held in Orlando, FL on Sep 13-14, 2022.



7. **Reina Ortiz M,+ Gertz A, Saint-Cyr N,\* Vasquez M, Wint K, Francois MJ,** Chen H, Martinez Tyson D, Marhefka S, Thirumurthy H. A systematic review of behavioral economic-based interventions to improve HIV prevention, retention in care, and viral suppression for people at risk for or living with HIV/AIDS. 2022 Academic International Medicine Annual Congress. Virtually held, Jun 9-12, 2022. **Best Original Research Presentation Award presented to student (see CV's mentoring section).**
8. *Ruiz E,* Martínez-Tyson D, Izurieta R, **Reina-Ortiz M,** Salinas A, Hoare I, Calvo A. Spanish-Language COVID-19 Vaccine Information and YouTube: A Digital Media Content Analysis. 2022 USF Social Marketing Conference. Clearwater, FL. May 27-28, 2022.
9. *Rolle L, Nabours B,* Martínez-Tyson D, Izurieta R, **Reina-Ortiz M,** Salinas A, Hoare I, Calvo A. Salud Latina USF Webinar series evaluation. Presented in USF Health Research Day. Tampa, FL. Feb 25, 2022.
10. *Hernandez-Bojorge S, Garza C, Osorio T,* Martínez-Tyson D, Izurieta R, **Reina-Ortiz M,** Salinas A, Hoare I, Calvo A. University of South Florida's College of Public Health "Salud Latina" Initiative to Address Health Disparities among Latinx communities in the US and abroad. Presented in USF Health Research Day. Tampa, FL. Feb 25, 2022.
11. **Reina Ortiz M\*+,** Hoare I, *Chacreton D, Le NK,* Izurieta R. Impact of Government-imposed Social Distancing Measures on COVID-19 Morbidity and Mortality Around the World. American Society of Tropical Medicine & Hygiene (ASTMH) 2021 Annual Meeting. Virtual, November 17-21, 2021.
12. Calvo A, Martinez-Tyson D, **Reina Ortiz M,** Salinas A, Izurieta R, Hoare I. University of south Florida's "Salud Latina" initiative to address health disparities among Latinx communities in the US and abroad. American Public Health Association (APHA) 2021 Annual Meeting & Expo. Denver, CO on October 24-27, 2021.
13. *Campos A, Wilson R, Macis M, Izurieta R, Teran E, Grunauer M,* **Reina Ortiz M,** Phan P. Financial incentives for HIV testing uptake: Is money enough? a post hoc analysis. Accepted for Poster Presentation in the American Public Health Association (APHA) 2021 Annual Meeting & Expo. Denver, CO on October 24-27, 2021.
14. Hoare I, Hoare O, **Reina Ortiz M.** We feed mostly on the .....things that we grow: The role of cultural identity and diabetes in southern Belize. Accepted for Oral Presentation in the American Public Health Association (APHA) 2021 Annual Meeting & Expo. Denver, CO on October 24-27, 2021.
15. *Chacreton D,* **Reina Ortiz M,** Hoare I. Evaluating the effect of national-level social distancing on the onset of peak sars-cov-2 daily case incidence. Accepted for Oral Presentation in the American Public Health Association (APHA) 2021 Annual Meeting & Expo. Denver, CO on October 24-27, 2021.
16. Sharma V, Lopez-Quintero C, Marhefka S, Baldwin J, Levin B, Rahill G, Luitel A, **Reina Ortiz M.** Intersections of Discrimination: Casteism and Mental Health Outcomes among College-Attending Nepali Earthquake Survivors. American Psychopathological Association Virtual Meeting, 2021.
17. **Reina Ortiz M\*+,** Hoare I, *Chacreton D, Lara D,* Izurieta R. Impact of Hurricane Irma on Arboviral Transmission in Florida. American Society of Tropical Medicine & Hygiene (ASTMH) 69<sup>th</sup> Annual



Meeting. Scheduled to be held in Toronto, Canada [held virtually due to COVID-19]. November 15-19, 2020.

18. **Reina Ortiz M\*+**, Grunauer M, Gutierrez E, Izurieta R, Rosas C, Macis M, Phan P, Teran E. Economic incentives and not behavioral nudges increase voluntary HIV testing among pregnant women in high-burden urban settings in a LMIC. Oral presentation in the American Public Health Association (APHA) 2020 Annual Meeting & Expo [held virtually because of COVID-19]. October 24-28, 2020.
19. **Reina Ortiz M\*+**, Pracht E, Hoare I, Salinas A, Thomas N, *Kurji, N.* Post-hurricane behavioral disorders: health disparities in rates of Florida inpatient episodes between 1991 and 2014. Accepted for presentation in the American Public Health Association (APHA) 2020 Annual Meeting & Expo [held virtually because of COVID-19]. October 24-28, 2020.
20. **Reina Ortiz M\*+**, Sharma V, Hoare I, Casanova J, Corvin J. Developing Global Health Diplomacy Skills in a Professional Global Health Program. Accepted to the 2020 Annual Meeting of the Association of Schools & Programs of Public Health, VA, USA. March 18-20, 2020. Conference cancelled due to COVID-19.
21. *Parikh JU*, **Reina Ortiz M**, Izurieta R. Evaluating the relationship between introduction of acellular pertussis vaccine and whooping cough re-mergence in the United States. Abstract accepted for poster presentation. American Society of Tropical Medicine & Hygiene (ASTMH) 68<sup>th</sup> Annual Meeting. National Harbor, MD, USA. November 20-24, 2019.
22. *Sharma V*, **Reina Ortiz M**. Chhaupadhi: Views on an ancestral practice that negatively impacts reproductive health and deteriorates women's rights. Poster Presentation. American Public Health Association (APHA) 2019 Annual Meeting & Expo. Philadelphia, PA, USA. November 2-6, 2019.
23. *Kloppenborg B*, Hoare I, *Sharma V*, Izurieta R, **Reina Ortiz M\***. Evaluating the association between canton-level Zika virus transmission and internally displaced populations size in post-earthquake Ecuador. Oral Presentation. American Public Health Association (APHA) 2019 Annual Meeting & Expo. Philadelphia, PA, USA. November 2-6, 2019.
24. *Sharma V*, **Reina Ortiz M\***, Hoare I, Thomas N, Salinas A. Reproductive behavior in post-earthquake Nepal: A comparison using a national-level survey. Oral Presentation. American Public Health Association (APHA) 2019 Annual Meeting & Expo. Philadelphia, PA, USA. November 2-6, 2019.
25. **Reina Ortiz M**, Hoare I, Chacretón D, Lara D, Izurieta R. Evaluating the impact of hurricane Irma on arboviral activity in Florida. Roundtable Presentation. American Public Health Association (APHA) 2019 Annual Meeting & Expo. Philadelphia, PA, USA. November 2-6, 2019.
26. **Reina Ortiz M\***, *Patel J*, Hernandez I, Flores M, Bejarano S, et al. Enhancing Community Asset Mapping methods by incorporating Geographic Information Systems techniques. Poster Presentation. American Public Health Association (APHA) 2019 Annual Meeting & Expo. Philadelphia, PA, USA. November 2-6, 2019.
27. Hoare I, **Reina Ortiz M**, Izurieta R. Human Resources for Health: A Threat and Opportunity for Belize. Abstract presented in the 2<sup>nd</sup> Belize National Research Conference. Belmopan, Belize. April 3-4, 2019.



28. *Redmond B, Reina Ortiz M\**. Civil Conflict and Urban Agriculture in the Sub-Saharan Tropics: The Democratic Republic of the Congo as a Case Study. Poster Presentation. American Society of Tropical Medicine & Hygiene (ASTMH) 67<sup>th</sup> Annual Meeting. New Orleans, LA, USA. Oct. 28 – Nov. 1, 2018.
29. *Le N, Reina Ortiz M*, Hernandez I, Rosas C, Sharma V, Teran S, Naik E, Saliu HM, Teran E, Izurieta R. Risky Sexual Behaviors Associated with Human Immunodeficiency Virus Transmission among Pregnant Ecuadoreans. Abstract presented in the 2018 Annual Meeting of the American College of Academic International Medicine (Academic International Medicine 2018 Congress). New York, NY, USA. July 27-29, 2018.
30. Macis M, Cuero Caicedo D, Gutierrez E, Grunauer M, Izurieta R, Phan P, **Reina Ortiz M+**, Rosas C, Terán E. “Improving voluntary HIV testing in low and middle income countries (LMIC): A report from a field experiment in Ecuador”. Poster presentation. 22<sup>nd</sup> International AIDS Conference (AIDS 2018). Amsterdam, the Netherlands. July 23-27, 2018.
31. Grunauer M, Izurieta R, Macis M, Phan P, **Reina Ortiz M\***, Teran E. Nudges and Incentives for HIV Testing: A Field Experiment in Ecuador. Abstract accepted for oral at the 2018 Annual Meeting of the American Society of Health Economists (Abstract #5635). Atlanta, GA, USA. June 10-13, 2018.
32. *Sharma V, Reina-Ortiz M*, Marhefka S. Post-earthquake HIV risk and mental health: Perceived inequities and resilience among adolescents in Nepal. Poster presentation. 2018 Annual Meeting of the Society for Adolescent Health and Medicine (SAHM) in Seattle, WA, USA. March 14-17, 2018.
33. *Chee V*, Calvo A, Terán E, Wright L, **Reina-Ortiz M**, Izurieta R, Hernandez I, Bejarano S, Rebolón A, Baldwin J, Flores M, Yamberla N, Martinez-Tyson D. La Desculturización versus La Desnutrición: Nutritional Concerns within Indigenous Communities in Ecuador and Panama. Poster presentation. American Public Health Association (APHA) 2017 Annual Meeting & Expo. Atlanta, GA, USA. Nov 4-8, 2017.
34. **Reina Ortiz M\***, Mejia ME, *Sharma V*, Naik E, Saliu H, Hoare I, Izurieta R. Post-earthquake Zika Virus surge in tropical lowlands of Ecuador: an analysis of population-based incident cases from January to July 2016 (Abstract LB-5150). Oral presentation. American Society of Tropical Medicine & Hygiene (ASTMH) 65<sup>th</sup> Annual Meeting. Atlanta, GA, USA. November 13-17, 2016.
35. *Chee V*, Wright L, Hernandez I, **Reina-Ortiz M**, Bejarano S, Flores M, Teran E, Izurieta R, Yamberla N, Baldwin J, Martinez-Tyson D. “La Desculturización” – Perceptions of diet and nutritional change among indigenous communities in Ecuador. Oral presentation. American Public Health Association (APHA) 2016 Annual Meeting & Expo. Denver, CO, USA. Oct 29-Nov 2, 2016.
36. *Bejarano S, Chee V*, Hernandez I, Flores M, *Yamberla N*, **Reina-Ortiz M**, Teran E, Izurieta R, Baldwin J, Martinez-Tyson D. Applying syndemic theory to assess risk factors for HIV/AIDS in the Indigenous communities of Imbabura, Ecuador. Poster presentation. American Public Health Association (APHA) 2016 Annual Meeting & Expo. Denver, CO, USA. Oct 29-Nov 2, 2016.
37. **Reina Ortiz M\***, Jacob B, Castillo Vera J, Diaz C, Izurieta R. Identifying Potential Malaria Vaccine Needs Based on Geospatial Analysis of Malaria Infection in Esmeraldas, Ecuador. Poster



presentation. Third International Conference Vaccinology in the Tropics. Panama City, Panama. January 20-22, 2016.

38. **Reina Ortiz M**, Hernandez I, Sharma V, et. al. Predictors of HIV-related Knowledge and Risk Behavior among school-attending teenagers in Esmeraldas, Ecuador. Oral presentation. American Public Health Association (APHA) 2016 Annual Meeting & Expo. Chicago, IL, USA. Oct 31 - Nov 4, 2015.
39. **Reina Ortiz M\***, Sharma V, Izurieta R. GIS-based modeling of the HIV/AIDS epidemic in Ecuador using nationally collected spatiotemporal screening and testing data. Poster presentation. American Public Health Association (APHA) 2016 Annual Meeting & Expo. Chicago, IL Oct 31 - Nov 4, 2015.
40. *Adegoke K*, Hernandez I, Ochoa T, Rosas C, Sharma V, **Reina M**, Teran E and Izurieta R. Prevalence of STI/HIV and factors associated with STI among female sex workers in Ecuador. Oral presentation. American Public Health Association (APHA) 2016 Annual Meeting & Expo. Chicago, IL Oct 31 - Nov 4, 2015.
41. **Reina Ortiz M\***, Castillo R, Valencia J, Diaz C, Quinonez M, Espinel M, Milhous W, Kwa B, Izurieta R. Defining early malaria treatment and its association with follow-up gametocytemia in Esmeraldas, Ecuador. Accepted for poster presentation at the Annual Meeting of the American Society of Tropical Medicine & Hygiene 64th Annual Meeting. Philadelphia, PA, USA. October 25-29, 2015.
42. Johnson A, Hernandez I, Ochoa T, Rosas C, Sharma V, **Reina Ortiz M**, Teran E, Izurieta R. Risk factors associated with HIV in MSM in Ecuador. XVII Congress of the Pan-American Association of Infectology. Quito, Ecuador. May 15-19, 2015.
43. Adegoke K, Hernandez I, Ochoa T, Rosas C, Sharma V, **Reina Ortiz M**, Teran E and Izurieta R. Knowledge, behaviors and factors associated with HIV among female sex workers in Esmeraldas, Ecuador. XVII Congress of the Pan-American Association of Infectology. Quito, Ecuador. May 15-19, 2015.
44. Sharma V, **Reina Ortiz M**, Rosas C, et. al. Association between gender and STIs/HIV knowledge and risk behaviors among youth in Esmeraldas, Ecuador. USF Health Research Day. Tampa, FL, USA. February 20<sup>th</sup>, 2015.
45. **Reina Ortiz M\***, Sharma V, Baldwin J, Izurieta R. Social and Structural determinants of HIV in Ecuador: An Analysis of the syndemic nature of HIV/AIDS and alcohol abuse among adolescents and young adults. NIAA Conference on Alcoholism, HIV and Other Comorbidities. Bogota, Colombia. June 5-6, 2014.
46. **Reina Ortiz M\***, Caliskan S., Jacob B., et al. Using Parish-level Prevalence Data within a GIS Environment to Understand and Predict Malaria Activity Foci in the Province of Esmeraldas, Ecuador. Abstract accepted for poster presentation at the 6<sup>th</sup> International Congress of the Society for Vector Ecology. La Quinta, CA, USA. September 22-27, 2013.
47. **Reina Ortiz M\***, Sharma V., Izurieta R. HIV Epidemics in Latin-America and its Lessons for the Asia Pacific Region. Abstract accepted for poster presentation at the 11th International Conference of AIDS in the Asia Pacific. Bangkok, Thailand. November 18-22, 2013.



48. Sharma V., **Reina Ortiz M\***, Marquez R. Role of Church in Strengthening HIV/AIDS and STI Prevention: Lessons to the Asia-Pacific. Abstract accepted for poster presentation at the 11th International Conference of AIDS in the Asia Pacific. Bangkok, Thailand. November 18-22, 2013.
49. **Reina Ortiz M\***, Acosta M., Sharma V., et al. Can Medical Male Circumcision for HIV prevention be implemented in a completely different context? Abstract accepted for poster presentation at the 11th International Conference of AIDS in the Asia Pacific. Bangkok, Thailand. November 18-22, 2013.
50. Sharma V, **Reina Ortiz M\***, Izurieta R. Exploring GIS-Based Methods in HIV Monitoring: Ecuador as a Case Study for the Asia Pacific Region. Abstract accepted for poster presentation at the 11th International Conference of AIDS in the Asia Pacific. Bangkok, Thailand. November 18-22, 2013.
51. Izurieta R, **Reina Ortiz M.** Ecuador: A Key Partner from the Center of the World. Global Health Showcase. University of South Florida. October 17, 2012.
52. **Reina Ortiz M\***, Izurieta R. Malaria in Panama: A Brief Historical Perspective. Abstract Accepted for oral presentation at the II National Meeting of Tropical Medicine and Research in Quito, Ecuador. June 20-22, 2012.
53. **Reina Ortiz M\***, Sharma V, Izurieta R. Ecuador Progress Towards MDG5. Abstract Accepted for oral presentation at the II National Meeting of Tropical Medicine and Research in Quito, Ecuador. June 20-22, 2012.
54. **Reina Ortiz M\***, Sharma V. HIV Prevalence in Asia and the Pacific: an Ecological Approach to Inequalities in the Region. Oral presentation at the 2012 Population Association of America. San Francisco, CA, USA. May 3-5 2012.
55. **Reina Ortiz M\***, Sharma V, Lohani S. Health inequalities and HIV Risky Sexual Behavior in Nepalese Population. Abstract accepted for poster presentation in the 10th International Congress on AIDS in Asia and the Pacific. Busan, Republic of Korea. August 26-30, 2011
56. **Reina Ortiz M\***. Immunity to *Ascaris lumbricoides* in schoolchildren of rural Ecuador. Oral presentation at the XIX Latin-American Congress on Microbiology. Quito, Ecuador. October 15-18, 2008
57. **Reina Ortiz M\***. The modified Th2 response and its relation to helminthiasis. Oral presentation at the IV SCAALA Seminar, Instituto de Saude Coletiva, Universidade Federal da Bahia. Salvador, Brazil. June, 2008.

#### Non-refereed articles

1. Izurieta R & **Reina-Ortiz M.** In: Featured Q & A. Can Venezuela Cope With a New Disease Epidemic? The Latin America Advisor. A Daily Publication of the Dialogue. Inter-American Dialogue. Available at: <http://advisor.thedialogue.org/wp-content/uploads/2018/05/LAA180510.pdf>. Last accessed Nov 11, 2019. Thursday, May 10, 2018. Washington D.C., USA.
2. Izurieta R & **Reina-Ortiz M.** In: Featured Q & A. Can South America Stop New Diseases Spread by Mammals? The Latin America Advisor. A Daily Publication of the Dialogue. Inter-American Dialogue.



Available at: <http://www.thedialogue.org/wp-content/uploads/2017/07/LAA170706.pdf>. Last accessed Nov 11, 2019. Thursday, July 6, 2017. Washington D.C., USA.

3. **Reina Ortiz M, Sharma V.** Ebola: From Fever to fever and from victory to victory. Article published in the College of Public Health News, USF, Tampa, FL. Available at <http://hscweb3.hsc.usf.edu/health/publichealth/news/fever-fever-victory-victory/>. Nov, 2014.
4. **Reina Ortiz M.** La fiebre del mundial podría no ser el gol I. Opinion article published in Diario La Hora on July 8, 2014. Esmeraldas – Ecuador.
5. **Reina Ortiz M.** La fiebre del mundial podría no ser el gol II. Opinion article published in Diario La Hora on July 18, 2014. Esmeraldas - Ecuador

#### International Talks | Invited Speaker/Moderator (Symposia, Panels, etc.)

1. **Hablemos de Salud Mental durante la Pandemia. Reina Ortiz, M: Moderator.** Webinar for the Latino Health Initiative, College of Public Health, University of South Florida. January 27, 2022. Tampa, FL [held online]. Recording available [here](#).
2. **Global Health Diplomacy: Cosmopolitan moments as drivers of international health negotiations.** Lecture for the ASTMH Committee on Global Health (ACGH) Symposium I - Global Health Diplomacy I. COVID-19 as a Cosmopolitan Moment: Leveraging Global Health Diplomacy for Pandemic Preparedness and Response. American Society of Hygiene and Tropical Medicine 2021 Annual Meeting. November 19, 2021. National Harbor, MD.
3. **COVID-19: Microbiology and Public Health Implications.** (Moderator). Student Global Health Conversation Series. USF Health International & Global Virus Network. November 18, 2021. Tampa, FL [held online]. Recording available [here](#). (3 views as of December 5, 2021).
4. **El cuidado de pacientes con la TBC con un enfoque de la justicia social determinantes de Salud.** (Moderator). Inaugural Global Health Conversation Series – Spanish. USF Health International & Global Virus Network. November 18, 2021. Tampa, FL [held online]. Recording available [here](#). (16 views as of December 5, 2021).
5. **Hablemos sobre el Impacto Social de COVID-19. Reina Ortiz, M: Mental Health.** Webinar for the Latino Health Initiative, College of Public Health, University of South Florida. June 24, 2021. Tampa, FL [held online]. Recording available [here](#). (181 views as of December 5, 2021).
6. **Hablemos de las Variantes de COVID-19.** Webinar for the Latino Health Initiative, College of Public Health, University of South Florida. May 27, 2021. Tampa, FL [held online]. Recording available [here](#). (245 views as of December 5, 2021).
7. **Role of Mathematical Models in Forecasting and Management of the COVID-19 Pandemic.** (Moderator). Global Health Conversation Series. USF Health International & Global Virus Network. November 18, 2021. Tampa, FL [held online]. Recording available [here](#). (25 views as of December 5, 2021).



8. **Hablemos sobre Tratamientos de COVID-19.** Webinar for the Latino Health Initiative, College of Public Health, University of South Florida. April 28, 2021. Tampa, FL [held online]. Recording available [here](#). (226 views as of December 5, 2021).
9. **The Merging of Two Crises: The Impact of Covid 19 on the Global Refugee Crisis.** (Moderator). Global Health Conversation Series. USF Health International & Global Virus Network. November 18, 2021. Tampa, FL [held online]. Recording available [here](#). (46 views as of December 5, 2021).
10. **Experiences translating biosafety measures to the home environment in the context of COVID-19.** Presented in the International Congress on Occupational and Safety Health Agencies 2020. December 18, 2020. Antalya, Turkey [held online due to COVID-19].
11. **COVID-19 in Latin America: Applied Research and Future Perspectives.** Lecture for the Seminário Mestrado Acadêmico em Virologia. Universidade FEEVALE. Nova Hamburgo, Brazil [virtually held]. November 20, 2020.
12. **Epidemic deterministic models of COVID-19 for Ecuador: assessing impact of reversing social distancing measures.** Presented in the COVID-19 and Migration in the Americas: Research and Practice Virtual Symposium. I also co-organized this event (see under Organization of Academic Events). UNINORTE, Barranquilla, Colombia and USF [virtually held]. November 12, 2020. Recording available [here](#) (305 views as of July 6, 2021).
13. **Apart Together: Impact of COVID-19 in migrant populations. Preliminary results.** Presented in the COVID-19 and Migration in the Americas: Research and Practice Virtual Symposium. I was a co-speaker on this talk with Beatriz Padilla. I also co-organized this event (see under Organization of Academic Events). UNINORTE, Barranquilla, Colombia and USF [virtually held]. November 12, 2020. Recording available [here](#) (305 views as of July 6, 2021).
14. **Modeling COVID-19 in Ecuador: Evaluating the Impact of Reversing Social Distancing Measures in Spring/Summer 2020.** Lecture for the Pre-Meeting Course of the American Society of Tropical Medicine & Hygiene (ASTMH) Committee on Global Health (ACGH), titled "Modeling for Disease Outbreaks Practical Approaches to Understanding and Using Models". Scheduled to be held in Toronto, Canada [virtually held]. November 11, 2020.
15. **COVID-19: actualización y perspectivas para el futuro.** [on line]. Pontificia Universidad Católica del Ecuador Sede Esmeraldas (PUCESE). August 20, 2020.
16. COVID-19 en el Ecuador y el Mundo Lecture Series. Epidemiología y Economía - Nueva Normalidad. **Lecture title: Modelos Epidemiológicos de COVID-19 en Ecuador.** [on line]. Academia Ecuatoriana de Medicina and Universidad San Francisco de Quito. June 17, 2020. Recording available [here](#) (1.7K views as of November 13, 2020).
17. **Impacts of COVID-19 on Immigrants and Refugees in the United States.** A Virtual Roundtable [on line]. The Initiative on Social Work and Forced Migration. Robert Stempel College of Public Health & Social Work. Florida International University. June 9th, 2020. Recording available [here](#) (187 views as of September 29, 2020).





18. **2019-nCov: Biology, Epidemiology and Prevention**. Sub-Dirección de Docencia e Investigación. Hospital General del Sur de Quito IESS. Quito. February 11, 2020.
19. **Situación actual del VIH/SIDA: acciones globales para la aplicación local**. Pontificia Universidad Católica del Ecuador – Sede Esmeraldas. Esmeraldas, Ecuador. January 23rd, 2020. Estimated Live Attendance: 150. Recording available [here](#) (1.2 K as of December 5, 2021).
20. **Global Health Security Panel**. 2<sup>nd</sup> Clinical Congress Connecting Health with Care & 1<sup>st</sup> Annual Scientific Forum. The American College of Academic International Medicine (ACAIM). Clearwater, FL. July 28<sup>th</sup>-30<sup>th</sup> 2017.
21. **Global Health in the 21st century: enabling and fostering international collaboration**. Universidad San Francisco de Quito. Quito, Ecuador. October 2015. Estimated Attendance: 25.
22. **Microarray technologies uses in immunological research**. First Immuno-epidemiology Course, Universidade Federal da Bahia. Salvador Bahia, Brazil. June 2008. Estimated Attendance: 50.

#### Organization of Academic Events

1. **Co-chair.** ASTMH Committee on Global Health (ACGH) Symposium – Climate Change and Global Health. American Society of Hygiene and Tropical Medicine 2022 Annual Meeting. To be held in Seattle, WA. Oct 30 - Nov 3, 2022.
2. **Support Organizer.** ASTMH Committee on Global Health (ACGH) Symposium – Role of Women in Global Health. American Society of Hygiene and Tropical Medicine 2022 Annual Meeting. To be held in Seattle, WA. Oct 30 - Nov 3, 2022.
3. **Chair.** Scientific Session 24: Global Health Security. American Society of Hygiene and Tropical Medicine 2021 Annual Meeting. Nov. 18, 2021. Virtual.
4. **Chair/Symposium Organizer.** ASTMH Committee on Global Health (ACGH) Symposium I - Global Health Diplomacy I. COVID-19 as a Cosmopolitan Moment: Leveraging Global Health Diplomacy for Pandemic Preparedness and Response. American Society of Hygiene and Tropical Medicine 2021 Annual Meeting. Nov 19, 2021. Virtual.
5. **President/Chair.** ASTMH Committee on Global Health Annual Business Meeting. American Society of Hygiene and Tropical Medicine 2021 Annual Meeting. Nov 19, 2021. Virtual.
6. **President/Chair.** ASTMH Committee on Global Health Council Meeting. American Society of Hygiene and Tropical Medicine 2021 Annual Meeting. Nov 12., 2021. Virtual.
7. **Co-organizer.** COVID-19 and Migration in the Americas: Research and Practice. Virtual Symposium. Universidad del Norte (Barranquilla, Colombia) and University of South Florida.



8. **Co-Chair.** ASTMH Committee on Global Health (ACGH) Symposium Pathogen Metagenomics in the Developing World: Four stories in four countries. American Society of Hygiene and Tropical Medicine 2020 Annual Meeting. Held online due to COVID-19.
9. **Co-Chair.** Field Applications for Stopping Infectious Disease Threats at International Points of Entry. ASTMH Committee on Global Health (ACGH) Pre-Meeting Course. American Society of Hygiene and Tropical Medicine 2019 Annual Meeting. Nov 20<sup>th</sup>, 2019. National Harbor, MD.
10. **Co-chair.** The Economics of Health and Disease: Making the Case for Global Health Spending. ASTMH Committee on Global Health (ACGH) Pre-Meeting Course. American Society of Hygiene and Tropical Medicine 2017 Annual Meeting. Nov 5<sup>th</sup>, 2017. Baltimore, MD.
11. **Director & Theory/Lab Instructor.** Introduction to Public Health GIS Workshop. Kathmandu University School of Medicine. Kathmandu, Nepal. May 2016. *Note: list of lectures provided in Teaching section.*
12. **Director & Theory/Lab Instructor.** Introduction to Public Health GIS Workshop. Tribhuvan University School of Psychology. Kathmandu, Nepal. May 2016. *Note: list of lectures provided in Teaching section.*
13. **Director & Theory/Lab Instructor.** Introduction to Public Health GIS Workshop. Tribhuvan University School of Social Work. Kathmandu, Nepal. May 2016. *Note: list of lectures provided in Teaching section.*
14. **Director & Theory/Lab Instructor.** Introduction to Public Health GIS Workshop. Tribhuvan University School of Medicine. Kathmandu, Nepal. May 2016. *Note: list of lectures provided in Teaching section.*
15. **Director & Theory/Lab Instructor.** Introduction to Public Health GIS Workshop. Prayas Pune (NGO). Pune, India. May 2016. *Note: list of lectures provided in Teaching section.*
16. **Director & Theory/Lab Instructor.** II GIS Applied to Health Workshop. Quito – Ecuador, March 14-17 2016. *Note: list of lectures provided in Teaching section.*
17. **Co-Director & Laboratory Instructor.** I GIS Applied to Health Workshop. Quito – Ecuador, October 2013. *Note: list of lectures provided in Teaching section.*



**Research Support**

## SUBMITTED AND PENDING RESEARCH SUPPORT (UNDER EVALUATION)

1. Project Performance Period: 09/01/2022-04/30/2027.  
Title: Tracking the burden, distribution, and impact of Post COVID-19 conditions in diverse populations for children, adolescents, and adults (Track PCC).  
Goal: To measure the burden, distribution, and impact of PCC using data-driven approaches based on state-wide (Utah) and borough-wide (The Bronx) Health Information Exchange data.  
Funding mechanism: Tracking the burden, distribution, and impact of Post COVID-19 conditions in diverse populations for children, adolescents, and adults (Track PCC) (CDC-RFA-IP22-2203)  
Sponsor: Centers for Disease Control and Prevention (CDC).  
Direct Funds: ~ 1,700,000.  
Role: Principal Investigator.

## ONGOING RESEARCH SUPPORT

2. Project Performance Period: 08/01/2021-07/31/2023.  
Title: EnRICHing Latinos living with HIV by optimizing retention in care: a culturally responsive incentive-based intervention that leverages loss aversion and fixed financial incentives.  
Goal: To use culturally responsive methods to adapt, develop, and pilot test an incentive-based intervention that leverages loss aversion and fixed financial incentives to optimize retention in HIV care (RICH) among Latinos living with HIV (LLHIV).  
Funding mechanism: CFAR ADeLANTE Mentoring New HIV//AIDS Investigators to Meet the Needs of Hispanic/Latino Communities.  
Sponsor: NIH via Emory University flow through (NIH-funded Centers for AIDS Research at Emory University and District of Columbia).  
Direct Funds: 200,000.  
Role: Principal Investigator.
3. Period: Spring 2021, for two years.  
Title: unCoVer: an international network (over 15 institutions in Europe, Asia, and the Americas) using real-world COVID-19-related data to study patient's characteristics, risk factors, safety and effectiveness of treatment.  
Goal: To harvest real-world data derived from the response and provision of care to patients by the health systems across Europe, and internationally during the COVID-19 to identify COVID-19 clinical and epidemiological patterns and knowledge gaps.  
Funding Program: Networking of existing EU and international cohorts of relevance to COVID-19. Framework: Horizon 2020.  
Sponsor: Horizon 2020 - European Union Commission.  
Note: European Commission rules do not allow for funds to be allocated to US-based investigators.  
Role: Co-investigator (Penalvo J, PI).



## COMPLETED RESEARCH SUPPORT

1. Project Performance Period: 10/01/2019-03/31/2021.  
Title: Measuring the Impact of the Large-scale Adoption of Ridesharing on the Spread of Infectious Diseases.  
Goal: To measure the impact of the large-scale adoption of ridesharing on the spread of infectious diseases by building an agent-based simulation model. Our agent-based simulation model will capture the patterns of ridesharing and various probabilistic spread of infectious diseases within ridesharing networks as well as within social and residential communities.  
Funding mechanism: Center for Transportation, Environment, and Community Health (CTECH).  
Sponsor: United States Department of Transportation via the Center for Transportation, Environment, and Community Health (CTECH). Cornell University & University of South Florida.  
Direct funds: 70,000.00 USD.  
Role: Co-Principal Investigator. (Changhyun Kwon, PI)
2. Project Performance Period: 2019-2021  
Title: "Disease conceptualization among Amerindian and African Diaspora populations: Interactions between non-communicable and infectious diseases on health outcomes in the Americas".  
Goal: Explore how Amerindian and African Diaspora populations in Belize conceptualize disease using HIV and Diabetes as a model.  
Funding mechanism: COPH Interdisciplinary Team Award Application.  
Sponsor: COPH, University of South Florida.  
Requested funding: 83,858.00 USD. [Suspended due to COVID-19].  
Role: Co-Principal Investigator. Hoare I (PI).
3. Project Performance Period: 08/01/2018-08/01/2020.  
Title: Evaluating the impact of Hurricane Irma on the detection rates of vector-borne infectious agents in the State of Florida.  
Goal: To assess how Hurricane Irma affected the transmission dynamics of vector-borne diseases in the State of Florida.  
Funding Mechanism: USF COPH Faculty Research Award.  
Sponsor: USF College of Public Health.  
Budget: 49,834 USD.  
Role: Principal Investigator.
4. Project Performance Period: 06/01/2016-05/31/2018  
Title: Behavioral Nudges, Information And Incentives for HIV Testing: A Field Experiment in Ecuador.  
Goal: To use an experimental design to evaluate which strategy would lead to increase uptake of HIV testing among participants in Esmeraldas, Ecuador.  
Funding Mechanism: Creative and Novel Ideas in HIV Research (CNIHR) Award  
Sponsor: International AIDS Society (IAS) in partnership with the National Institutes of Health (NIH) and the NIH-funded Centers for AIDS Research (CFAR).  
Budget: 371,630 USD.  
Role: USF Principal Investigator. Macis M (PI – Johns Hopkins University).



5. Project Performance Period: Spring 2015  
Title: Effect of timely treatment on Plasmodium gametocytemia and malaria incidence rates in the province of Esmeraldas, Ecuador.  
Goal: To evaluate the association between time-to-treatment and gametocytemia in patients diagnosed with malaria in Esmeraldas, Ecuador.  
Funding Mechanism: Institute for the Study of Latin America and the Caribbean (ISLAC) Research Award.  
Sponsor: Institute for the Study of Latin America and the Caribbean (ISLAC), USF.  
Budget: 1,500 USD.  
Role: Principal Investigator.
6. Project Performance Period: Fall 2014-2016.  
Title: The Syndemic Nature of HIV/AIDS Among Indigenous Populations in Latin America.  
Goal: To explore co-occurring epidemics of HIV, Substance Abuse and Violence in indigenous populations in Latin America.  
Funding Mechanism: College of Public Health (COPH) Research Award  
Sponsor: College of Public Health (COPH), USF.  
Budget: 100,000 USD.  
Role: Co-Investigator.
7. Project Performance Period: 2013-2015.  
Title: Testing Microfluidic Chamber as an innovative diagnostic tool for geohelminth infection.  
Goal: To assess the effectiveness of a Microfluidic Chamber to diagnose geohelminth infections.  
Role: Co-Investigator.

#### SUBMITTED RESEARCH SUPPORT APPLICATIONS (NOT FUNDED)

1. **Co-Principal Investigator.** Padilla B (PI). 2020. Afro-Latinxs in Tampa Bay, Florida: Mapping the Past and Present of the Afro-Latinx Racial Experience. Funding mechanism: USF Understanding and Addressing Blackness and Anti-Black Racism in Local, National, and International Communities Research Grants.
2. **Co-Principal Investigator.** Padilla B (PI). 2020. Barriers and facilitators to access COVID-19-related healthcare services among migrant populations in the Tampa Bay Area. Funding mechanism: USF COVID-19 Rapid Response Research Proposals.
3. **Co-Principal Investigator.** Das D (PI). 2020. Artificial-intelligence-based automatic statistical meta-analysis of rapidly expanding COVID-19 literature. Funding mechanism: USF COVID-19 Rapid Response Research Proposals.
4. **Co-Principal Investigator.** Izurieta R (PI). 2019. The *S. typhi* Information System: A Transdisciplinary Approach. Funding mechanism: Grand Challenges Explorations Round 23. Organization: Bill and Melinda Gates Foundation – Grand Challenges in Global Health. Requested funding: 100,000.00 USD.
5. **Principal Investigator.** 2019. Health Needs among Refugee Women of Iraqi/Syrian Origin in Tampa Bay. Funding mechanism: Women’s Health Collaborative Award Application. Organization: University of South Florida Women’s Health. Requested funding: 15,000.00 USD.



6. **Co-Investigator.** Izurieta R (PI). 2018. Effects of climate variability, seasonality and soil characteristics on the development, dormancy, and inactivation of Soil Transmitted Helminths (STH). Funding mechanism: Ecology and Evolution of Infectious Diseases. Organization: National Science Foundation. Requested funding: 1,187,975.00 USD.
7. **Co-Investigator.** Izurieta R (PI). 2018. Ethics Training for Health Investigators in Central And Latin-America (ETHICAL). Funding mechanism: International Research Ethics Education and Curriculum Development Award (R25), PAR-16-081. Organization: National Institutes of Health – Fogarty International Center. Requested funding: 1,538,815.00 USD.
8. **Co- Investigator.** Mukhopadhyay C (PI). 2018. Antimicrobial resistance in community settings: utilizing the One Health perspective to break resistance chain. Funding mechanism: Grand Challenges India: New Approaches to Characterize the Global Burden of Antimicrobial Resistance. Requested funding: 88,200.00 USD.
9. **Principal Investigator.** 2018. “Annawan”: Combating Malnutrition in Rural Haitian Children. Funding mechanism: Grand Challenges in Global Health Explorations, Round 21. Requested funding 100,000.00 USD.
10. **Principal Investigator.** 2018. Evaluating the sensitivity and specificity of a novel, low-cost parasite diagnostic device in human, animal, and environmental samples from North America, Latin America and the Caribbean, and South Asia. Funding mechanism: Internal limited submission Moore Inventor Fellows. Requested funding: 596,563.24 USD
11. **Co-Project Director.** Izurieta R (PD). 2017. Malaria Elimination is Attainable Project, Nepal. Achieving Zero falciparum malaria incidence rates in Nepal. Funding mechanism: Private Foundation. Requested Funding 523,360.38 USD.
12. **Co-Principal Investigator.** 2017 & 2018. Hoare I (PI). “Disease conceptualization among Amerindian and African Diaspora populations: Interactions between non-communicable and infectious diseases on health outcomes in the Americas”. Submitted to the National Institutes of Health R21 funding mechanism PAR-16-052. Requested Funding: 377,480 USD.
13. **Co-investigator.** Izurieta R (PI). 2016 & 2017. Epidemiology of Zika Infection among Pregnant Women in Ecuador. Submitted to the National Institutes of Health R21 funding mechanism PAR-16-106. Requested Funding: 374,000 USD.

#### OTHER RESEARCH EXPERIENCE

1. **Co-Investigator.** An Epidemiological Survey of HIV and STIs among selected populations (including pregnant women, school-attending teenagers, commercial sex workers and men who have sex with men) in Esmeraldas, Ecuador. (Spring 2014)
2. **Investigator.** A Qualitative-Quantitative approach to the Assessment of Water Quality and Related Health issues in the rural community of Chica, Panama. (Spring 2014)



3. **Co-Investigator.** Water and Health in the Nandamojo Watershed (2013, ongoing). Epidemiological, Community Based Participatory Research project on Community Needs regarding water and related healthcare issues in rural tropical areas in Guanacaste Province, Costa Rica. Responsible of conducting in-depth interviews and Focus Group Discussions with corresponding transcription and preliminary analysis. Interdisciplinary Research Development Award, State of Florida.
4. **Principal Investigator.** Sexual Health and Risky Sexual Behavior among Older Adults Living in the Tampa Bay Area (Spring 2013, closed).
5. **Principal Investigator.** Feasibility and Acceptability of Voluntary Medical Male Circumcision among Ecuadorian MSM (Fall 2012, closed) Qualitative research using Focus Group Discussions as an exploratory approach to evaluate the feasibility and acceptability of Ecuadorian MSM to participate in research of VMMC as a HIV prevention strategy.
6. **Principal Investigator.** HIV Prevalence in Asia and the Pacific: an Ecological Approach to Inequalities in the Region (Summer 2011, closed).
7. **Co-Investigator.** Association between fertility treatments and health outcomes in the offspring (Spring 2011, closed). A cohort study on the association between use of fertility treatment in mothers and health outcomes in the offspring using survival analysis<sup>11</sup>.
8. **Co-Investigator.** Sexual Health among Nepalese Adolescents (2011, closed). A research describing risky sexual behavior among Nepalese population.
9. **Co-Investigator.** Diverse immune response to varying levels of helminth infections in rural Ecuador (Summer 2008, closed). A cross-sectional study describing the immunologic and molecular characteristics of school-age children exposed to different burdens of helminthic infection.
10. **Principal Investigator.** Atypical clinical manifestation of Dengue Fever (2009, closed). A clinical report of one case of Dengue fever manifested primary with symptoms of cholecystitis.

## HONORS, AWARDS AND SCHOLARSHIPS

### *International-level*

#### **American Public Health Association**

Excellence in Abstract Submission on an International Topic Award. HIV/AIDS Section. American Public Health Association (APHA). 2020 APHA Annual Meeting.

#### **The International AIDS Society**

Scholarship to attend AIDS 2020. July 2020. San Francisco, CA (delivered virtually due to COVID-19 containment measures).

#### **The Society of Vector Ecology (SOVE) International Congress Award**

Awarded by SOVE to present in the 6<sup>th</sup> SOVE International Congress, La Quinta, CA. Sep 22-27, 2013.



**2010 International Master of Public Health Scholarship**

Awarded by the British Friends of the Hebrew University to study in the International Master of Public Health program at the Hebrew University of Jerusalem.

**Unnamed Travel Award, 2008**

Awarded by the University of British Columbia to attend a Bioinformatics Workshop in Vancouver, Canada.

**Unnamed Travel Award, 2007**

Awarded by the Grand Challenges in Global Health-sponsored research group to attend their annual meeting in Cambridge, UK.

***National-level***

**Delta Omega. Honorary Society in Public Health**

Inducted by the Chapter at the University of South Florida. April 4, 2016.

**Love of Learning Award 2013**

Awarded by the Honor Society of Phi Kappa Phi.

**The Honor Society of Phi Kappa Phi**

Member by election of the Chapter at University of South Florida since Spring 2013.

***University-level***

**Hispanic Heritage Appreciation Month – Top Three Scholarly Work Award**

Presented by the USF College of Nursing – USF Health scholarly Works Showcase, part of the Hispanic Heritage Appreciation Month. October 2019.

**Faculty International Program Development Award**

Awarded by the College of Public Health, University of South Florida to conduct GIS workshops and establish/enhance research partnerships in Nepal and India. 2015-2016.

**COPH International Research and Enrichment Scholarship**

Awarded by the College of Public Health, University of South Florida, to participate in the NIAAA conference on Alcoholism, HIV and Other comorbidities held in Bogota, Colombia on June 5-6, 2014

**COPH International Research Scholarship**

Awarded by the College of Public Health, University of South Florida, to develop and teach a GIS workshop in developing regions.

**Student Honorary Award for Research and Practice - 2013**

Awarded by the College of Public Health, University of South Florida, to partially cover expenses to attend the 6<sup>th</sup> SOVE, La Quinta, CA. Sep 22-27, 2013.

**Student Honorary Award for Research and Practice - 2012**

Awarded by the College of Public Health, University of South Florida, to give the oral presentations 'HIV prevalence in the Asia Pacific Region: An Ecological Approach to Inequalities' at the Population Association of America Annual Meeting on May 3-5, 2012.





**'Vaccinology in the Tropics' Conference Travel Award**

Awarded by the College of Public Health, University of South Florida, to attend the conference 'Vaccinology in the Tropics', held in Panama City, Panama on March 15-17, 2012.

**Unnamed Partial Tuition Waiver/Scholarship**

Awarded by the College of Public Health, University of South Florida, to study in the Global Communicable Diseases PhD program at the Department of Global Health.

**Presidential Scholarship, 2006**

Awarded by the Universidad San Francisco de Quito to study in the Master of Microbiology program at the Institute of Microbiology.

**School of Medicine, 2004**

Tenth best graduate (out of 324) from the School of Medicine, Faculty of Medical Sciences, Universidad Central del Ecuador. Quito, Ecuador.



## TEACHING AND MENTORING EXPERIENCE

Course	Level	Role	Semester	Number of Students
			Fall 2021	29
			Fall 2020	17
			Fall 2019	19
PHC 6764 - Global Health Principles & Contemporary Issues	Master	Instructor	Fall 2018	20
			Fall 2017	21
			Fall 2016	29
PHC 7935 - Tropical Diseases	Doctoral	Instructor	Fall 2018	1
			Fall 2020	29
PHC 6516 - Tropical Diseases	Master	Instructor	Fall 2019	26
			Fall 2018	23
PHC 7908 – Spec. Study – M. Learning	Doctoral	Instructor	Summer 2020	1
PHC 7908 – Spec. Study – Public Health GIS	Doctoral	Instructor	Fall 2019	2
			Fall 2017	1
			AY 2019/2020	72
		Faculty	AY 2018/2019	79
Public Health Scholarly Concentration – Morsani College of Medicine (USF)	Doctoral (Medicine)	Leader	AY 2017/2018	66
			AY 2016/2017	47
		Co-instructor	AY 2014/2015	~12
			Spring 2021	11
			Spring 2020	12
			Spring 2019	16
PHC 6442 - Global Health Applications in the Field		Co-Instructor	Spring 2018	17
	Graduate		Spring 2017	12
		Instructor	Spring 2016	19
			Spring 2022	5
			Spring 2021	5
			Spring 2020	7
PHC 6037 – Public Health Virology	Graduate	Instructor	Spring 2019	9
			Spring 2018	5



Course	Level	Role	Semester	Number of Students
			Spring 2017	11
			Spring 2016	10
PHC 6934 – Introduction to Global Health Diplomacy	Graduate	Instructor	Summer 2020	2
PHC 6934 – Data-driven Decision-making in Global Health	Graduate	Instructor	Summer 2019	1
			Summer 2018	1
PHC 6934 – Introduction to Analytical Methods in Global Health	Graduate	Instructor	Summer 2017	1
2016		Co-instructor	Summer 2015	2
PHC 5933 – Intro to Public Health GIS	Graduate	Instructor	Fall 2017	18
			Fall 2016	6
PHC 4140 – Intro to Public Health GIS	Undergraduate	Instructor	Fall 2017	18
HSC 4631 – Critical Issues in Public Health	Undergraduate	Instructor	Summer 2020	39
HSC 4031 – Emerging Infectious Diseases	Undergraduate	Supervisor	Summer 2020	39
			Summer 2015	94
HSC4624 - Foundations of Global Health (on line)	Undergraduate	Co-Instructor / Teaching Assistant (TA)	Fall 2014	100
			Summer 2014	65
			Spring 2014	102
			Fall 2013	95
		Instructor	Summer 2013	40
PHC 4101 – Introduction to Public Health	Undergraduate	Instructor	Spring 2014	100
			Spring 2013	41
PHC 4101 – Introduction to Public Health (on line)	Undergraduate	Co-Instructor / TA	Spring 2013	77
PHC 4720 – Foundation PH Writing	Undergraduate	Instructor	Fall 2014	29

AY = Academic Year; TA = Teaching Assistant; USF = University of South Florida



## Guest Lectures

Course Title	Level	Course Primary Instructor	Year	# of Lectures
MMCR 7005 Virología Animal (Universidad San Francisco de Quito, Ecuador)	Graduate	Patricio Rojas	Fall 2021	2
MMCR 7005 Virología Animal (Universidad San Francisco de Quito, Ecuador)	Graduate	Patricio Rojas	Fall 2020	2
Sex, Health and Decision Making	Undergraduate	James Van Elswyk	Spring 2019	2
Sex, Health and Decision Making	Undergraduate	Ellen Daley	Fall 2018	1
Immunology	Graduate	Ricardo Izurieta	Fall 2018	1
Immunology	Graduate	Ricardo Izurieta	Spring 2018	1
Public Health GIS	UG/G	Benjamin Jacob	Spring 2018	1
Sex, Health and Decision Making	Undergraduate	Ellen Daley	Spring 2018	1
Vaccines	Graduate	Ricardo Izurieta	Fall 2017	1
Global Health Program Development and Administration	Graduate	Ismael Hoare	Fall 2017	Presentation Evaluator
Drug Discovery	Graduate	Rays Jiang	Fall 2017	1
Cultural Competence Panel	Graduate	Martha Coulter	2017	1
Public Health Immunology	Graduate	Ricardo Izurieta	Spring 2017	1
Intro to Health Disparities	Undergraduate	Aldenise Ewing	Fall 2017	1
Child Health and Development	Graduate	Martha Coulter	Spring 2017	1
Vaccines	Graduate	Ricardo Izurieta	Fall 2016	1
Introduction to Public Health GIS	UG/G	Benjamin Jacob	2016	2
Public Health Immunology	Graduate	Ricardo Izurieta	2016	2
Scholarly Concentration Public Health (MCOM)	Professional	Rahul Mhaskar	2016	1
Cultural Competence Panel	Graduate	Martha Coulter	2016	1



**Professional Presentations**

*(For additional presentations please refer to the 'oral and poster presentations in Scientific/Academic Conferences' section)*

Title	Estimated attendance	College / University OR Venue	Location	Date
Global Health. Health Sciences Doctoral Program.	20	Centro de Investigaciones y Estudios de la Salud - UNAN	Managua, Nicaragua	March, 2017
Convocation Lecture: Global Health. Global Health Master's Program Convocation.	45	Centro de Investigaciones y Estudios de la Salud - UNAN	Managua, Nicaragua	March, 2017
Introduction to GIS.	5	Intro to Public Health GIS Workshop	Pune, India	May, 2016
GIS Applied to Public Health.	5			
Understanding the GIS lingo.	5			
Land Use Land Cover Analysis for health issues.	5			
Interpolation algorithms in GIS.	5	Intro to Public Health GIS Workshops (4 venues)	Kathmandu, Nepal	May, 2016
Introduction to GIS.	140			
GIS Applied to Public Health.	140			
Understanding the GIS lingo.	140			
Land Use Land Cover Analysis for health issues.	140			
Interpolation algorithms in GIS.	140	II GIS Applied to Health Workshop	Quito, Ecuador	March, 2016
Introduction to GIS.	10			
GIS Applied to Public Health.	10			
Understanding the GIS lingo.	10			
Land Use Land Cover Analysis for health issues.	10			
Interpolation algorithms in GIS.	10			
Georeferencing for Infectious Diseases.	10			
Trans-platform communication in GIS applications.	10			



**Training on Applied Methods (organized and presented).** In addition to GIS workshops listed earlier.

Title	Role	Venue & Location	Date	Estimated attendance
GIS & Remote Sensing Applied to Health	Laboratory Instructor	I GIS Applied to Health Workshop	October, 2013	40
SAS Laboratory: The Generalized Linear Model	Instructor & Facilitator	SAS Workshop. COPH, USF. Tampa, FL	Fall 2014	15
Pulsed Field Gel Electrophoresis	Instructor & Facilitator	I Course on Molecular Epidemiology. Quito, Ecuador	July, 2006	25

#### Department/College Seminars organized

Title	Level	College	University	Duration
7 at 5 Lecture Series (COPH Anniversary) – Global Health Diplomacy. Migration & Health.	Graduate	Public Health	USF	February 25, 2020
Global Health Diplomacy – Seminar II	Graduate	Public Health	USF	October 24, 2019
Global Health Diplomacy – Seminar I	Graduate	Public Health	USF	September 19, 2019
Global Health Seminar	Graduate	Public Health	USF	Spring 2016
Global Health Seminar	Graduate	Public Health	USF	Fall & Spring 2017
Global Health Seminar	Graduate	Public Health	USF	Spring 2018

#### Academic advising

Academic Year	Role	Master-level students	Doctoral students
2019/2020*	Advisor	0	2
2018/2019*	Mentor	26	1
	Advisor	0	3
2017/2018	Mentor	32	1
	Advisor	9	4
2016/2017	Mentor	16	1
	Advisor	17	2

\* Changes in the college structure meant that non-faculty advisors were appointed to master-level students. After those changes, faculty are assigned only mentoring roles for master-level students.





**Teaching Assistant positions and other teaching positions (previous to Fall 2015).**

2014	Teaching assistant for the course Global Issues in Environmental Health <b>(Graduate level)</b> . Fall 2014. Department of Global Health and Department of Environmental Health, College of Public Health, University of South Florida.
2013	Teaching Assistant for the course GIS Public Health <b>(advanced, graduate level)</b> . Summer, 2013. Department of Global Health. College of Public Health. University of South Florida.
2013	Teaching Assistant (Graduate Assistantship) for the course Infection Control Program Design <b>(Graduate level)</b> . Spring 2013. College of Public Health, University of South Florida.
2012 – 2013	Teaching Assistant (Graduate Assistantship) for the course Public Health Topics in Global Sustainability <b>(Graduate level)</b> . Fall 2012 and Fall 2013 (ad honorem). University of South Florida.
2009 – 2011	Thesis Mentor. <b>Dermatology Postgraduate Residency Program</b> . Universidad Central del Ecuador. Quito, Ecuador.
2009 – 2011	Instructor for the course of Research Methods <b>(Graduate Level)</b> . Dermatology Postgraduate Residency Program. Universidad Central del Ecuador. Quito, Ecuador.
2009 – 2010	Instructor for <b>undergraduate</b> courses (Schools of Medicine, Odontology, Nursing and Physiotherapy). Universidad de las Americas. Quito, Ecuador.
2008	Co-organizer and Lecturer of the Helminthology course <b>(Graduate Level)</b> . Master of Microbiology Program. Pontificia Universidad Catolica del Ecuador. Jan-May, 2008.

**Mentoring*****Awards/Achievements won by my advisees/mentees***

1. Saint-Cyr N Received the Best Original Research Presentaiton Award for the abstract: Reina Ortiz M,+ Gertz A, Saint-Cyr N,\* Vasquez M, Wint K, Francois MJ, Chen H, Martinez Tyson D, Marhefka S, Thirumurthy H. A systematic review of behavioral economic-based interventions to improve HIV prevention, retention in care, and viral suppression for people at risk for or living with HIV/AIDS. 2022 Academic International Medicine Annual Congress and Scientific Forum, American College of Academic International Medicine. Virtually held, Jun 9-12, 2022.
2. Chacreton D. USF Scholarship.
3. Chacreton D. Student Honorary Award for Research and Practice.
4. Saturday T. USF COPH Scholarship.



***Major Professor of Doctoral Level Dissertation/Culminating Projects***

5. Chacreton D. Evaluating the impact of social distancing on COVID-19 spread. Expected graduation: Summer 2021.
6. Irue M. Evaluating Barriers and Facilitators for a Diabetes Self-Management Program in a Community in Ghana. DrPH. Expected graduation: Spring 2021.
7. Rogers K. Developing a Train-the-Trainer Course for Port Health Service Officers at Points of Entry: Course Curriculum, Training Methodologies and Evaluation. DrPH. Graduation: Fall 2018.

***Committee Member of Doctoral Level Dissertations/Culminating Projects***

1. Bell J. Relationship between marketing strategies and the Opioid Epidemic in Florida. Committee Member. PhD Degree. Expected culmination, Fall 2021.
2. Kernbach M. Effects of dim light on Avian Host competence to West Nile Virus – immunological and virological profiles. Committee Member. PhD Degree. Graduation: Spring 2021.
3. Roberts S. Barriers to accessing HIV/AIDS Services among individuals Living within Rural Regions of New York. Committee Member. DrPH Degree. Expected culmination, Fall 2021.
4. Mehra S. “Estimating The Impact of a Select Criteria Pollutant (PM2.5) on Childhood Asthma in Florida”. Committee Member. PhD Degree. Graduation: Spring 2017.

***Chair/Major Professor of Master's Theses***

1. Boykin J. “Validation of Chimeric Viruses in Plaque Reduction Neutralization Tests for Arboviral Disease Diagnostics”. Co-Major Professor. MPH Degree. Fall 2017.

***Chair Honor's College Thesis (Undergraduate)***

1. Hoang C. “Association between sociodemographic characteristics and COVID-19 testing rates in Florida: an Ecological Study”. Thesis Chair. Summer 2021. Expected Graduation: Spring 2022.

***Committee Member Honor's College Thesis (Undergraduate)***

1. Skoutelis N. “Global COVID-19 Vaccine Inequality: The challenges in securing equitable vaccine distribution”. Committee Member. Fall 2021. Expected Graduation: Spring 2022.

***Directed Research – Doctoral Level***

1. Namata, I. “Diabetes Self-Management in Accra, Ghana”. Fall 2019 & Spring 2020.
2. Peek, J. “Use of GIS methods to understand geographic determinants of Human Trafficking-related reports”. Fall 2019.
3. Rogers K. “Port of Entry (POE) Public Health Capacity Building in Resource-Limited Countries: Identifying Existing Resources, Gaps, and Solutions to Aid Resource-Limited Countries in Strengthening Public Health at Designated POE”. Spring 2017.



***Master's Level Special Projects & Integrated Learning Experiences (ILEs)\****

*\* ILEs replaced Special Projects in 2018*

1. Mansour, M. Health Living Program: A Policy Analysis. Summer 2020.
2. Neal, J. Evaluating TORCH-related Knowledge, Attitudes, and Practice among service providers in Tampa Bay. Fall 2019.
3. Mandes-Basili MA. Prevalence of Intimate Partner Violence among College Students. Summer 2019.
4. Lara D. Evaluating Impact of Natural Disasters in Latin America: Time Series Analysis. Spring 2019.
5. Parikh J. Impact of vaccination policies on pertussis incidence. Fall 2018.
6. Gonzalez-Bardales A. Determinants of health outcomes in prion disease. Fall 2018.
7. Pullia A. Physical Activity Among South Asian Women in Western Australia: An Exploratory Study. Summer 2018.
8. Kratzer J. "Air traffic and antibiotic resistance". Summer 2018.
9. Redmond B. "Civil Conflict within the DRC: The Influence of Urban Agriculture". Spring 2018.
10. Butler G. "Zika: A Look Into Microcephaly and Florida's System of Care". Fall 2017.
11. Balkaran T. "Socioeconomic Variables and Zika Infection in Ecuador". Summer 2017.

***Field Experiences, Applied Practice Experiences (APEs)\* & other Field Research Mentoring***

*\* APEs, which may include Field Experiences, replaced them as a course in some programs in 2018.*

1. Rolle, L. COVID-19 responses in Hendry County, FL. Summer 2020.
2. Mandes-Basili, MA. Developing Adolescent Health Programs in a Hurricane-affected Caribbean Island. Fall 2019.
3. Saturday T. (MPH Student). Health Needs Assessment among Rohingya Refugee Populations in Bangladesh. Fall 2019.
4. Santiago W. (MPH Student). Evaluating Maternal and Child Health Programs in Quito, Ecuador. Summer 2019.
5. Lara D. (MPH Student). Evaluating a Recently-implemented Women's Health Program in Puerto Rico. Summer 2019.
6. Garcia J. (MPH Student). Community Health Needs Assessment in Women's Health-related Issues in Panama. Summer 2019.



7. Rickloff M. (MPH Student). Health Needs Assessment in an Insular Community in Nicaragua. Summer 2019.
8. Noor A. (MPH Student). Evaluating Impact of the Diabetes Contraception and Pre-pregnancy Program (DCAPP) among Healthcare Professionals and Patients in a Private Fertility Clinic in Australia. Summer 2019.
9. Castillo S. (MPH Student, USF). Community-engaged activities in Peru. Fall 2018.
10. Sanabria C. (MPH Student, USF). HIV prevention in Ecuador. Fall 2018.
11. Gonzalez-Bardales A. (MPH Student, USF). Florida Department of Health Bureau. Fall 2018.
12. Jones J. (MPH Student, USF). Improving health literacy. Fall 2018.
13. Perez C. (MPH Student, USF). Data analysis and quality assurance in a youth-serving clinic. Fall 2018.
14. Parikh J. (MPH Student, USF). Performance of microfluidic chamber to diagnose *Ascaris* ova. Fall 2018.
15. Bachan R. (MPH Student, USF). Community-based Public Health in Belize. Fall 2018.
16. Maguire J. (MPH Student, USF). HIV education in Zambia. Fall 2018.
17. Millan E. (MPH Student, USF). Alcoholism and HIV in Ecuador. Summer 2018.
18. Chharath K. (MPH Student, USF). Health and nutrition for reproductive age women and children under 5 in Cambodia. Summer 2018.
19. Muncy J. (MPH Student, USF). Madariaga virus outbreaks in Eastern Panama. Summer 2018.
20. Parra C. (MPH Student, USF). Florida Department of Health – Miami. Summer 2018.
21. Pullia A. (MPH Student, USF). Physical activity among South Asian women in Perth, Australia. Summer 2018.
22. Precious DW (MPH Student, USF). Parasitic disease diagnosis. Fall 2017.
23. DeLacure D. (MPH Student, USF). Detection level of Kato-Katz technique for geohelminths. Fall, 2017.
24. Butler G. (MPHC Student, USF). Zika perceptions in South Florida. Summer, 2017.
25. Campos A. (MPH Student, USF). Behavioral nudges of HIV testing in Esmeraldas, Ecuador. Summer 2017.
26. Grantt J. (MPH Student, USF). Innovative Geohelminth Diagnostic Techniques. Tampa, USA. Spring 2017.



27. Samot-Bidot D. (MPH Student, Ponce Health Sciences University). HIV risk determinants among at-risk population of Ecuador. Fall 2016.
28. Bejarano S. (MPH Student, USF). The syndemic nature of HIV/AIDS among indigenous communities in Latin America. Otavalo, Ecuador. Fall 2015.
29. Skylar Ch. (MPH Student, USF), Jennie M. (MS Student, USF), Jennafer C. (MPH Student, USF), Anh Thy N. (Peace Corps MPH Student, USF), Joy M. (MPH Student, USF), Gabrielle D. (MPH Student, USF), Bryan T., MPH, Estefania G. (MD Student, Universidad de Panama), Carlos R. (MD Student, Universidad de Panama). International Health Student Collaborative, Spring, 2014. Chica, West Panama, Panama.

***Peace Corp Programs (includes Coverdell Fellows)***

1. Montoya M. (MPH Student, USF – Coverdell Fellow). Refugee health in Tampa Bay. Fall 2018.
2. Castillo S. (MPH Student, USF). Community-engaged activities in Peru. Fall 2018.
3. Sanabria C. (MPH Student, USF). HIV prevention in Ecuador. Fall 2018.

***Teaching/Research/Graduate/Student Assistants and volunteers supervised***

1. Alida G (DrPH Student), Research Assistant for the ADeLANTE Award. Spring 2022.
2. Neielle S (MPH Student), Research Assistant for the ADeLANTE Award. Spring 2022.
3. Daniel C (PhD Student). Graduate Assistant for post-hurricane arboviral transmission research project Fall 2018, Spring 2019, Summer 2019, Fall 2019, Spring 2020.
4. Bradley S (MPH Student). Student Assistant. Post-hurricane arboviral transmission research project. Spring and Summer 2019.
5. Carpenter S (MPH Student). Student Assistant. Post-hurricane arboviral transmission research project. Spring and Summer 2019.
6. Kakkad A (MPH Student). Student Assistant. Post-hurricane arboviral transmission research project. Spring and Summer 2019.
7. Desiree L (MPH Student). Graduate assistant for post-hurricane arboviral transmission research project. Fall 2018 & Spring 2019.
8. Maria BM (MPH Student). Graduate assistant for conducting lit review on community-engaged research. Fall 2018.



9. Blake M (MPH student). Graduate assistant for post-hurricane arboviral transmission research project. Summer 2018.
10. (MPH Student). Graduate assistant for conducting lit review on community-engaged research. Summer 2018.
11. Guilherme G (Post Doc). Volunteered in microfluidic chamber research. Spring 2017.
12. Samuel BM (PhD Student). Teaching assistant for *PHC 6442 Global Health Applications in the Field* class. Fall 2016.
13. Bernhard K (MPH Student). Teaching assistant for *PHC 6037 Public Health Virology* class. Spring 2016.

***Faculty Mentor for Student Organization's field trip***

1. International Health Student Collaborative (IHSC) – Mexico City Service Trip – Spring 2020. IHSC is an interprofessional (medicine, nursing, pharmacy, public health, physical therapy) student organization. A total of 18 students participated in the Spring 2020 Mexico City Service Trip.

***Dermatology Postgraduate Residency Program – Universidad Central del Ecuador***

1. Victor H. Pinos-Leon. "Evaluating the association between psoriasis and cardiovascular risk factors in the Ecuadorian population". Completed, June, 2010.
2. Rosa J. Mateus. "Estimating the prevalence of dermatopathology among elderly people living in assisted living facilities in Quito, Ecuador. Completed, September, 2010.
3. Isabel Teran. "Dermatologic findings in children suffering from trisomy 21 in Quito, Ecuador". Completed, October, 2010.

***Director, Global Health Writing Group***

Provide writing mentorship to graduate and professional students from the College of Public Health and the Morsani College of Medicine, University of South Florida. A total of 5 students currently participate or have ever participated of this Writing Group (Bernhard K, Jeegan P, Nicole L, Precious D, Jaladhikumar P, Carlos P, Mhar P).

***Faculty Guest, Eta Sigma Gamma Faculty-Student Luncheon***

*"The Luncheon is a semi-structured networking experience, and its mission is to foster social capital and build stronger relationships."* March 5, 2019.



## CONTINUING EDUCATION AND TRAININGS

### Professional Development

1. Center for Collaborative Online International Learning (COIL) Foundations Workshop. The State University of New York [online]. July 9 - 29, 2020. As part of the Virtual Global Exchange at USF.
2. Green & Gold Teaching Champion Program. Certificate awarded for successfully completing the Fall 2019 Green & Gold Teaching Champion Program. Academy for Teaching and Learning Excellence. University of South Florida.
3. Promotion & Tenure Workshop. College of Public Health, University of South Florida. May 7, 2020.
4. Peer Observation Program Fall 2019. Academy for Teaching and Learning Excellence. University of South Florida. Tampa, Fl. Fall 2019.
5. Course Design Institute. Academy for Teaching and Learning Excellence. University of South Florida. Tampa, Fl. August 5-9, 2019.
6. NIH Regional Seminar on Program Funding and Grants Administration. National Institutes of Health. Baltimore, MD. May 15-17, 2019.
7. 2018 Florida Consortium Learning Assistant Workshop. Florida International University. Miami, Fl. November 17-19, 2018.
8. Academy for Teaching and Learning Excellence. First Friday - October. University of South Florida. Tampa, Fl – USA. Oct 4, 2018.
9. Academy for Teaching and Learning Excellence. First Friday - September. University of South Florida. Tampa, Fl – USA. Sep 6, 2018.
10. Academy for Teaching and Learning Excellence. Summer Teaching Symposium 2018: “Motivating and Inspiring students”. University of South Florida. Tampa, Fl – USA. May 9-10, 2018.
11. JMP Workshop. University of South Florida. 2018.
12. Promotion & Tenure Workshop. College of Public Health, University of South Florida. April 7, 2017.
13. Productive Conflict 2. MTM Associates. Location: College of Public Health, University of South Florida. April 14, 2017.
14. Productive Conflict 1. MTM Associates. Location: College of Public Health, University of South Florida. March 10, 2017.
15. DiSC Communication Style (Working with your Chair). MTM Associates. Location: College of Public Health, University of South Florida. December 12, 2016.



16. DiSC Communication Style (Motivating Students & Colleagues). MTM Associates. Location: College of Public Health, University of South Florida. November 4, 2016.
17. Your DiSC Communication Style. MTM Associates. Location: College of Public Health, University of South Florida. October 7, 2016.
18. Annual Promotion and Tenure Workshop. College of Public Health, University of South Florida. April 8, 2016.
19. College Budgeting Processes. College of Public Health, University of South Florida. March 4, 2016.
20. Course Design: Time-saving best practices. Academy for Teaching and Learning Excellence (ATLE). Spring 2016.
21. Exploring interconnections between the environment, health and wellbeing. Dr. Micael Depledge. College of Public Health. Dec 2, 2015.

#### **Courses and Conferences**

1. 70<sup>th</sup> Annual Meeting of the American Society of Tropical Medicine & Hygiene. [Virtual Meeting due to COVID-19]. November 17 – 21, 2021.
2. 25<sup>th</sup> CFAR (Center for AIDS Research) Annual Meeting. Philadelphia, PA [attended virtually due to COVID-19]. November 2 – 5, 2021.
3. Fast-track Cities 2021. International Association of Providers of AIDS Care. Lisbon, Portugal [attended virtually due to COVID-19]. October 20-22, 2021.
4. 69<sup>th</sup> Annual Meeting of the American Society of Tropical Medicine & Hygiene. [Virtual Meeting due to COVID-19]. November 15 – 19, 2020.
5. 148<sup>th</sup> Annual American Public Health Association Meeting. [Virtual Meeting due to COVID-19]. October 19 – 28, 2020.
6. AIDS 2020 (Virtual). July 6-10, 2020.
7. UF-USF Microbiome Workshop. Gainesville, FL. December 5, 2019.
8. 68<sup>th</sup> Annual Meeting of the American Society of Tropical Medicine & Hygiene. National Harbor, MD. Nov 20 – 24, 2019.
9. 147<sup>th</sup> Annual American Public Health Association Meeting. Philadelphia, PA. Nov 2 – 6, 2019.
10. 67<sup>th</sup> Annual Meeting of the American Society of Tropical Medicine & Hygiene. New Orleans, LO. Oct 28 – Nov 1, 2018.
11. 7<sup>th</sup> Annual Conference of the American Society of Health Economists. Atlanta, GA. June 10 – 13, 2018.





12. Society for Adolescent Health and Medicine 2018 Annual Meeting. Seattle, WA. March 14 – 17, 2018.
13. 66<sup>th</sup> Annual Meeting of the American Society of Tropical Medicine & Hygiene. Baltimore, MD. Nov 5 – 7, 2017.
14. 2<sup>nd</sup> Annual Academic International Medicine Congress. Clearwater, FL. July 28 – 30, 2017.
15. 65<sup>th</sup> Annual Meeting of the American Society of Tropical Medicine & Hygiene. Atlanta, GA. Nov 13 – 17, 2016.
16. 144<sup>th</sup> Annual American Public Health Association Meeting. Denver, CO. Oct 29 – Nov 2, 2016.
17. First National Conference on Adolescent Health and Development in Nepal. Kathmandu – Nepal, May 2 – 3, 2016.
18. Sixth Annual American Society of Tropical Medicine & Hygiene Conference in Peru. Lima – Peru, March 21 – 23, 2016.
19. Third International Conference Vaccinology in the Tropics. Panama City – Panama, January 20 – 22, 2016.
20. NIAA Conference on Alcoholism, HIV and Other Comorbidities. Bogota – Colombia, June 5 – 6, 2014.
21. Annual Population Association of America Meeting 2012. San Francisco, CA May 2012.
22. Vaccinology in the Tropics. Gorgas Memorial Institute and University of South Florida. Panama City, Panama. March 15 – 17, 2012.
23. Thirteenth Annual Lawton Chiles International Lecture & Symposium on Maternal and Child health in the Americas. College of Public Health, University of South Florida. Tampa, FL USA. February 14, 2012.
24. Good Laboratory Practice Workshop. Guayaquil, Ecuador. October 14, 15, 16, 23 and 24, 2011.
25. Good Clinical Practice Course. F. Hoffmann-La Roche. Guanajuato, México. June 20th, 2009.
26. XIX Latin-American Congress on Microbiology. Asociación Latinoamericana de Microbiología and Sociedad Ecuatoriana de Microbiología. Quito, Ecuador. October, 2008.
27. IV SCAALA Seminar. Instituto de Saúde Coletiva, Universidade Federal da Bahia. Salvador, Brazil. June, 2008.
28. First Immunoepidemiology Course. Instituto de Saúde Coletiva, Universidade Federal da Bahia. Salvador, Brazil. June, 2008.
29. 3<sup>rd</sup> Annual Meeting for the Grand Challenges in Global Health project “Novel Therapeutics that boost Innate Immunity to treat Infectious Diseases”. Asnieres-Sur Oise. Paris, France. January 8 – 10, 2008.



30. CME activity: "A 62-Year-Old Man With a History of Hypertension". The Discovery Institute of Medical Education. Chicago, IL. United States of America (on line). 2007.
31. First National Course on Molecular Epidemiology. Institute of Microbiology, Universidad San Francisco de Quito. Quito, Ecuador. 2006.
32. First National Course on Primary Health. Asociación Nacional de Médicos Rurales (ANAMER) – Filial Pichincha. Quito, Ecuador. 2004.
33. Pain Management Course. Facultad de Ciencias Médicas, Universidad Central del Ecuador. Quito, Ecuador. 2004.
34. Informatics Course. Centro de Informática Biomédica, Facultad de Ciencias Médicas, Universidad Central del Ecuador. Quito, Ecuador. 2000.

#### **Advanced Workshops and Trainings**

1. Bioinformatics Workshop (microarray data analysis). Centre for Microbial Diseases and Immunity Research, University of British Columbia at Vancouver. Vancouver, Canada. April 2-3, 2008.
2. Microchip array analysis training. Wellcome Trust Sanger Institute, Wellcome Trust Genome Campus, Hinxton. Cambridgeshire, United Kingdom. October 2007 to March 2008.
3. Molecular biological and immunological methods training. Centre of Infectious Diseases, St. George's University of London. London, United Kingdom. October 2007 to March 2008.

#### **SERVICE**

##### **University Service**

2021	Member of Search Committee for one faculty position within the College of Public Health.
2021	Reviewer. USF CPH Scholarships.
2020	I have contributed to the development of a Knowledge, Attitudes, [Behaviors], and Practices survey to evaluate readiness for COVID-19 vaccination among healthcare workers in Tampa General Hospital. CPH & Morsani College of Medicine, USF.
2019 – present	Faculty Advisor to the International Health Service Collaborative (multidisciplinary student organization), USF Health, USF.
2018 – present	Faculty Advisor to the Global Health Student Association, CPH, USF.
2017 – present	Faculty Advisor to the Nepalese Student Association (NeSA) at USF.



2020	Reviewer. USF CPH Scholarships.
2018 – 2020	Faculty Representative to the CPH Research Committee.
2019	Reviewer. USF CPH Scholarships.
2018 – 2019	Member of Search Committee for two different positions (one faculty, one staff) within the College of Public Health
2017 – 2019	Member of the CPH Violence Prevention Advisory Committee.
2016 – 2018	Member of the Department of Global Health's APT Committee until the department was transformed into another structure within the college.
2016 – 2018	Member of the Doctor of Public Health Advisory Committee, CPH.
2016 – 2017	Member of the Doctor of Public Health Qualifying Exam sub-committee.
2014 – 2015	Member of the USF Health Student International Ambassador Program.
2014 – 2015	Graduate Student Representative to the Policy and Fellowship Committee, University of South Florida Tampa Graduate Council, a body of the Faculty Senate, University of South Florida
2014 – 2015	Graduate Student Representative to the University of South Florida Tampa Graduate Council, a body of the Faculty Senate, University of South Florida.
2014 – 2015	College of Public Health Chair for the Student Chapter of the Personalized Medicine Coalition at the University of South Florida.
2014 – 2015	Student Representative and Member on the Educational and Technology Assessment (ETA) Advisory Committee, College of Public Health, University of South Florida
2003 – 2004	Student Representative for the School of Medicine Board (Student Government Representative, an honor-based and democratically elected appointment)

**Professional Service**

2022 - present	Member. City of Tampa Fast-Track Task Force – in development, not yet established.
2021 – 2022	Member of the Digital Education Committee. American Society of Tropical Medicine & Hygiene.
2021 – 2022	Past President. American Society of Tropical Medicine and Hygiene (ASTMH) Committee on Global Health.



2020 – present	Appointed member of the Scientific Program Committee. American Society of Tropical Medicine & Hygiene.
2020 – present	Chair. Strategic Planning Activities Sub-Committee. American Society of Tropical Medicine & Hygiene Committee on Global Health (ACGH).
2020 – 2021	President. American Society of Tropical Medicine and Hygiene (ASTMH) Committee on Global Health.
2020	Program Planning Committee – extension (Abstract Reviewer). American Public Health Association. Injury Control and Emergency Health Services & HIV/AIDS programs.
2019 – 2020	Selected. Item Writer. CPH examination. <b>National Board of Public Health Examiners.</b>
2019 – present	Member. Association of Schools & Programs of Public Health (ASPPH) Global Engagement & Partnerships Advisory Committee.
2018 – 2020	Member. Publications Committee. American College of Academic International Medicine.
2018	Member. Society for Adolescent Health Medicine.
2019 – 2020	President-Elect. American Society of Tropical Medicine and Hygiene (ASTMH) Committee on Global Health.
2017 – 2019	Secretary-Treasurer. American Committee on Global Health – American Society of Tropical Medicine and Hygiene.
2016 – present	Member of the American Committee on Global Health – American Society of Tropical Medicine and Hygiene
2016 – present	Member of the Global Water Pathogens Group, a UNESCO-funded initiative.
2016 – 2018	Member of the International Health Section – American Public Health Association Member of the HIV/AIDS Section – American Public Health Association
2005	Treasurer for the Asociación Nacional de Médicos Rurales – Filial Esmeraldas (National Association of Rural Medical Doctors, Esmeraldas Chapter)

#### Journal and other Peer-Review service

2022	Reviewer. Frontiers in Public Health.
2021 - 2022	Reviewer. British Medical Journal Open.



2021	Reviewer. Partnerships for Enhanced Engagement in Research (PEER) Program. National Academies of Sciences, Engineering, and Medicine.
2021	Selected for the Early Career Reviewer (ECR) Program. NIH Center for Scientific Review.
2021	Reviewer. USF COPH Internal Research award.
2021	Reviewer. This is Public Health (TIPH) Global Grant Program. Global Network for Academic Public Health. Service provided via the Association of Schools and Programs of Public Health (ASPPH).
2020	Reviewer. The American Journal of Tropical Medicine & Hygiene. American Society of Tropical Medicine & Hygiene.
2020	Reviewer. PLoS ONE.
2019; 2022	Reviewer. <i>Trichuris trichiura</i> Fact Sheet. <b>World Health Organization.</b>
2019; 2022	Reviewer. USF COPH Internal Research award.
2019 – present	Peer Reviewer & Member of the Editorial Board for the Christian Journal for Global Health. Published by Health for All Nations. (In process).
2018 - 2020	Peer Reviewer & Member of the Editorial Board for the International Journal of Academic Medicine. Wolters Kluwer-Medknow. American College of Academic International Medicine. USA.
2018 -	Peer Reviewer for the American Journal of Men's Health. SAGE Publications. USA.
2013 -	Peer Reviewer for the International Journal of Dermatology. International Society of Dermatology. Wiley-Blackwell. Oxford, UK.
2012 -	Member, Editorial Council of Revista Médica Vozandes. Hospital Vozandes Quito. Quito, Ecuador.
2013	Member, Editorial Committee of Revista de la Facultad de Ciencias Médicas Quito (Journal of the Quito Medical Sciences Faculty). Quito, Ecuador.

#### Conference Reviewer

2019 – 2021.	Scientific Judge. USF Health Research Day. Tampa, Fl. February 22 <sup>nd</sup> , 2019; February 2020; and February 2021 [2021 meeting is virtual, judging has been replaced for mentorship, to be completed by February 26 <sup>th</sup> , 2021].
2018	Discussant for the 7 <sup>th</sup> Conference of the American Society of Health Economists. <i>Economics and Public Health</i> . Atlanta, GA June 10 <sup>th</sup> -13 <sup>th</sup> , 2018.



- 2017 Abstract Submission Reviewer for the American Public Health Association Annual Meeting – International Health Section (Community-based & Global HIV/AIDS sub-sections).
- 2012 Research proposal reviewer for the First Encounter of Researchers of Tropical Medicine in Ecuador. February, 2012.

### Community Service

- **Abrazo a la Distancia:** a task force formed by the Hispanic Outreach Center, Pinellas County Health and Human Services, Juvenile Welfare Board of Pinellas, Moffitt, Estrategia Group and Empath Health. Invited Speaker for the Webinar titled “Conversando con expertos sobre la Vacuna - Covid-19,” held on October 14<sup>th</sup>, 2021 at noon. Recording available here: <https://vimeo.com/632244389>
- **South Florida Baptist Hospital.** Volunteer for the 2013 Paediatric Health Fair in Plant city.
- **Bridge Clinic USF.** Volunteer interpreter for clinical services on Fall, 2012.
- **OLLY USF.** Volunteer guest lecturer of the world cultures course on Spring, 2012.
- **CHIQUITITOS.** Organizer and Volunteer as a medical doctor in an outreach activity in rural communities of Ecuadorian Coast in 2008.
- **Hospital Voz Andes Oriente.** Volunteer as a medical doctor in a medical campaign in rural communities of Ecuadorian Amazonia in 2004.

### Community Engagement (Educational talks and press articles)

#### Talks

1. **Reina Ortiz M, Sharma V.** HIV/AIDS, why is it everybody’s concern? A brief description of HIV/AIDS biology and epidemiology at the global, national (Ecuador) and provincial (Esmeraldas) level. Conference given at the Pontificia Universidad Catolica de Esmeraldas and Universidad Tecnica Luis Vargas Torres. Esmeraldas Nov 24-25, 2013.
2. **Reina Ortiz M, Sharma V.** HIV/AIDS. A brief description of HIV/AIDS biology and epidemiology at the global, national (Ecuador) and provincial (Esmeraldas) level. Conference given at the Colegio Montalvo. Montalvo - Esmeraldas Nov 7, 2013.
3. **Reina Ortiz M.** Ecuador. Osher Lifelong Learning Institute – Exploring World Cultures with USF International Students. February, 2012.



***Media and Press coverage***

1. Telemundo 49. Vacunas disponibles contra la viruela del mono en la bahía de Tampa. Julio 21, 2022. Telemundo 49. Available at: <https://www.telemundo49.com/noticias/vacunas-disponibles-contra-viruela-del-mono-en-la-bahia-de-tampa/2134173/>
2. Telemundo 49. Alerta por ostras contaminadas en la Bahía de Tampa. Julio 7, 2022. Telemundo 49. Available at: <https://www.telemundo49.com/noticias/local/alerta-por-ostras-contaminadas-en-la-bahia-de-tampa/2131254/>
3. Telemundo 49. Alza en casos de Covid-19 en la bahía de Tampa. June 14, 2022. Telemundo 49. Available at: <https://www.telemundo49.com/noticias/alza-en-casos-de-covid-19-en-la-bahia-de-tampa/2126603/>
4. Telemundo 49. Preocupación por el aumento de COVID-19 en la Bahía de Tampa. Telemundo 49. June 1, 2022. Available at: <https://www.telemundo49.com/noticias/local/preocupacion-por-aumento-de-covid-19-en-la-bahia-de-tampa/2124169/>
5. Kislinger V. ¿Estamos cerca de la cura del VIH? Científicos anuncian la cura de una paciente en Nueva York. Feb 15, 2022. WFLA – Tampa Hoy. Available at: <https://www.wfla.com/tampa-hoy/tu-salud-importa/estamos-cerca-de-la-cura-del-vih-cientificos-anuncian-la-cura-de-una-paciente-en-nueva-york/>
6. Kislinger V. ¿Es este el fin de la pandemia? Casos de Covid-19 bajaron drásticamente en los Estados Unidos. Feb 10, 2022. WFLA – Tampa Hoy. Available at: <https://www.wfla.com/tampa-hoy/tu-salud-importa/mujeres-hispanas-tienen-mayor-riesgo-de-sufrir-de-cancer-cervical/>
7. Kislinger V. Mujeres hispanas tienen mayor riesgo de sufrir de cáncer de cuello uterino. Jan 31, 2022. WFLA – Tampa Hoy. Available at: <https://www.wfla.com/tampa-hoy/tu-salud-importa/mujeres-hispanas-tienen-mayor-riesgo-de-sufrir-de-cancer-cervical/>
8. Chavez JC. USF initiative working to dispel vaccine myths for Spanish speakers. Tampa Bay Times. Date Published: December 17, 2021. Available at: <https://www.tampabay.com/news/2021/12/17/usf-initiative-working-to-dispel-vaccine-myths-for-spanish-speakers/>
9. Campisano D. HIV, Latinos and their pursuit of care. USF College of Public Health News. Date Published: October 25, 2021. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/hiv-latinos-and-their-pursuit-of-care/>



10. Telemundo 49 – Tampa Bay. Aclarando dudas sobre la vacuna de Johnson & Johnson. Interview [video; Spanish language]. April 13, 2021. Available at: <https://www.telemundo49.com/coronavirus-local/aclarando-dudas-sobre-la-vacuna-de-johnson-johnson/2052302/>
11. Campisano D. Dean Donna Petersen teams with USF Ombuds Office to organize USF Respectful Responders program. USF College of Public Health News. Date Published: April 9, 2021. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/dean-donna-petersen-teams-with-usf-ombuds-office-to-organize-usf-respectful-responders-program/>
12. Lovett S, Gerena T, Campisano D. Global Health Begins at Home: MCHSO Hosts Virtual Symposium. USF College of Public Health News. Date Published: April 9, 2021. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/global-health-begins-at-home-mchso-hosts-virtual-symposium/>
13. Shalabi L. USF Public Health Experts To Host COVID-19 Vaccination Discussion For Spanish-Speaking Community. WUSF Public Media. Published: Mar 15, 2021. Available at: <https://wusfnews.wusf.usf.edu/health-news-florida/2021-03-15/usf-public-health-experts-to-host-covid-19-vaccination-discussion-for-spanish-speaking-community>
14. Iraheta A. USF to Hold Virtual Spanish Calls on COVID Vaccine, Prevention. Bay News 9. Published: Mar 11, 2021. Available at: <https://www.baynews9.com/fl/tampa/coronavirus/2021/03/11/usf-to-hold-virtual-spanish-calls-on-covid-vaccine--prevention#>
15. Kumar D. USF to host Spanish-language virtual sessions on COVID-19, vaccines. Tampa Bay Times. Date Published: March 10, 2021. Available at: <https://www.tampabay.com/news/health/2021/03/10/usf-to-host-spanish-language-virtual-sessions-on-covid-19-vaccines/>
16. Campisano D. Presenter, speaker, chair: Dr. Miguel Reina Ortiz takes on variety of roles at ASTMH meeting. USF College of Public Health News. Date Published: January 11, 2021. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/presenter-speaker-chair-dr-miguel-reina-ortiz-takes-on-variety-of-roles-at-astmh-meeting/>
17. Mayor A. Leave the potential for COVID-19 contamination at the front door. USF College of Public Health News. Date Published: July 24, 2020. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/leaving-the-potential-for-covid-19-contamination-at-the-front-door/>
18. Gregory J. COVID-19 suggestions for Orlando theme parks leave gaps in guest, employee safety. Orlando Rising. Date Published: May 3, 2020. Available at: <https://orlando-rising.com/covid-19-suggestions-for-orlando-theme-parks-leave-gaps-in-guest-employee-safety/>





19. Brown C. COPH professor presents on HIV epidemic in Ecuador. USF College of Public Health News. Date Published: April 24, 2020. Available at:  
<https://hscweb3.hsc.usf.edu/health/publichealth/news/coph-professor-presents-on-hiv-epidemic-in-ecuador/>
20. Polanco Stereo. Entrevistas #AIDescubierto. Recording Available [here](#) (1.8K views as of December 5, 2021).
21. Brown C. COPH professor works to solve HIV epidemic in Ecuador. USF College of Public Health News. Date Published: Feb 21, 2019. Available at:  
<https://hscweb3.hsc.usf.edu/health/publichealth/news/coph-professor-works-to-solve-hiv-epidemic-in-ecuador/>
22. Association of Schools & Programs of Public Health (ASPPH). "South Florida: Public health research seeks to understand how natural disasters impact spread of Zika". ASPPH Connect – Member Research and Reports. Date Published: Jan 25, 2018. Available at: <https://www.aspph.org/south-florida-public-health-research-seeks-to-understand-how-natural-disasters-impact-spread-of-zika/>
23. USF College of Public Health. "Public health research seeks to understand how natural disasters impact spread of Zika". USF College of Public Health News. Date Published: 9 Jan, 2018. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/public-health-research-seeks-understand-natural-disasters-impact-spread-zika/>
24. Aaron Hilf. "Public health research seeks to understand how natural disasters impact spread of Zika". USF Health News. Date Published: Dec 22, 2017. Available at: <https://hscweb3.hsc.usf.edu/blog/2017/12/22/understanding-natural-disasters-impact-disease/>
25. "Alistan estudio sobre VIH-SIDA". Diario La Hora Esmeraldas. Date Published: Jan 22, 2017.
26. Kathmandu University. "Speech by Dr. Reina-Ortiz on GIS and Public Health". Kathmandu University News. Date Published: Jun 5, 2016.  
<http://www.ku.edu.np/news/index.php?op=ViewArticle&articleId=1524&blogId=1> (Last accessed, February 24<sup>th</sup>, 2019).
27. Cristina Coello. "Sistema Geolocalizador beneficia la toma de decisiones en salud". Redacción Médica. Date Published: Mar 16, 2016. Available at:  
<https://www.redaccionmedica.ec/secciones/gestion/sistema-geolocalizador-beneficia-la-toma-de-decisiones-en-salud-87380>



28. Anna Mayor. "COPH researchers investigate HIV/AIDS among indigenous Latin American populations". Date Published: Feb 4, 2016. College of Public Health News. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/coph-researchers-investigate-hivaids-among-indigenous-latin-american-populations/>
29. **Reina Ortiz M**, Martinez-Tyson D, Izurieta R, Chee V, Bejarano S. Interview in local Kichwa-speaking radio in the context of the research "The syndemic nature of HIV/AIDS among indigenous communities in Latin America". Ilumán, Otavalo, Imbabura, Ecuador. November 12, 2015.
30. MGQ. "A romper mitos del chikungunya". Diario La Hora Esmeraldas. Date Published: May 3, 2015.
31. Interview in local radio in Esmeraldas (Radio Candela, Raices program) to talk about public health concerns and vector-borne disease transmission in Esmeraldas, Ecuador. March 12, 2014.
32. "Conferencistas advierten sobre enfermedades tropicales y VIH". Diario La Hora Esmeraldas. Date Published: Nov 26, 2013
33. FHI. "Conociendo más sobre el VIH-SIDA". Date Published: Nov 25, 2013. Diario La Hora Esmeraldas.
34. USF COPH. "Drs. Miguel Reina Ortiz and Ricardo Izurieta report on HIV/AIDS epidemic in Asia Pacific". College of Public Health News. Date Published: Feb 18, 2013. Available at: <https://hscweb3.hsc.usf.edu/health/publichealth/news/drs-miguel-reina-phd-student-in-gh-and-ricardo-izurieta-publish-article-on-hivaids-epidemic-in-asia-pacific/>

## HONOR SOCIETIES AND PROFESSIONAL MEMBERSHIPS

### *Active*

2019 – Present	Member, Injury Control and Emergency Health Services section, American Public Health Association
2019 – 2020	Member, Latino Caucus, American Public Health Association
2017 – Present	Member, Florida Public Health Association
2016 – Present	Member, Delta Omega, Honor Society in Public Health
2015 – Present	Member, HIV section, American Public Health Association. Membership between 2015-2017 & 2019 – present.
2015 – Present	Member, American Public Health Association. Membership between 2015-2017 & 2019 – present.



2013 – Present	Member, The Honor Society of Phi Kappa Phi
2013 – Present	Member, American Society of Tropical Medicine and Hygiene. Non-continuous.
<b>Inactive</b>	
2018 – 2019	Society for Adolescent Health and Medicine
2017 – 2019	Member, American College of Academic International Medicine
2012	Member, National Committee of Research on Tropical and Infectious Diseases (Ecuador)
2012 – 2015	Member, Population Association of
America 2008 – 2012	Member, Ecuadorian Microbiology
Society 2007 – 2008	Member, Medical College of Esmeraldas
2004 – 2005	Member of the Asociación Nacional de Médicos Rurales – Filial Esmeraldas (National Association of Rural Medical Doctors, Esmeraldas Chapter)

## LANGUAGES

**Spanish.** Natal Tongue

**English.** Proficient

**Portuguese:** Spoken, written and read: Upper-

intermediate. **French.** Spoken and read: Upper-

intermediate; Written: Fair. **Nepali, Greek, Hebrew,**

**Japanese:** Basic.

## REFERENCES

Available upon request.



**J. MAC McCULLOUGH, PhD, MPH****EDUCATION**

- PhD** Health Policy & Management, University of California Los Angeles (UCLA), 2013  
Concentration: Organizational Behavior
- MPH** University of Minnesota, School of Public Health, 2010  
Concentration: Health Policy
- BS** Foreign Service, Georgetown University, 2006  
Concentration: International Health

**PROFESSIONAL EXPERIENCE**Boise State University

- 2022 - *current* Associate Professor, School of Public and Population Health  
Director, Public Health Agency Partnerships

Arizona State University

- 2020 - 2022 Associate Professor, College of Health Solutions  
Senior Global Futures Scientist, Julie Ann Wrigley Global Futures Laboratory  
Honors Faculty, Barrett Honors College
- 2014 - 2020 Assistant Professor, College of Health Solutions  
Program Coordinator, Science of Health Care Delivery (2019-20)  
Deputy Director, National Safety Net Advancement Center (2015-20)

Maricopa County Department of Public Health

- 2014 - 2022 Public Health Economist

Additional Positions & Previous Experiences

- 2010 - 2014 Research Analyst and Graduate Student Researcher  
Department of Health Policy & Management  
UCLA Fielding School of Public Health
- 2009 - 2010 Co-Chair of the Board  
Phillips Neighborhood Clinic, Minneapolis MN
- 2008 - 2010 Research Assistant  
Division of Health Policy & Management  
University of Minnesota School of Public Health
- 2006 - 2008 Program Associate  
National Academy of Sciences, Washington DC
- 2004 - 2006 Program Assistant  
U.S. Department of State, Washington DC

**PEER-REVIEWED PUBLICATIONS**

- McCullough JM**, Robins M. The Opportunity Cost of COVID for Public Health Practice: COVID-19 Pandemic Work and Lost Foundational Areas of Public Health Work. *Journal of Public Health Management & Practice*. 2022;Accepted.
- Leider JP, **McCullough JM**, Singh SR, Sieger A, Gendelman M, Fisher JS, Kuehnert P, Castrucci BC. Staffing and Sustaining the Public Health Workforce. *Journal of Public Health Management & Practice*. 2022;Accepted.
- Bishai DM, Resnick B, Lamba S, Cardona C, Leider JP, **McCullough JM**, Gemmill A. Being Accountable for Getting Public Health Reform Right this Time. *American Journal of Public Health*. 2022; ePub ahead of print  
<https://doi.org/10.2105/AJPH.2022.306975>.
- Olson M, Pena A, Putz ME, Ayers S, Knowler WC, **McCullough JM**, Shaibi GQ. Cost-Effectiveness of a Diabetes Prevention Program among Latino Youth with Prediabetes. *Diabetes*. 2022;71(Suppl1):987

5. Singh S, **McCullough JM**. Exploring the Relationship between Local Governmental Spending on the Social Determinants of Health and Healthcare Costs of Privately-Insured Adults. *Population Health Management*. 2022;25(2):192-198.
6. Lamba S, Wolfson C, Cardona C, Alfonso YN, Gemmill A, Resnick B, Leider JP, **McCullough JM**, Bishai D. Local government health spending was not correlated with COVID-19 control in US counties. *Social Science & Medicine – Population Health*. 2022; 17:101027.
7. Yeager VA, Balio CP, **McCullough JM**, Leider JP, Orr J, Singh SR, Bekemeier B, Resnick B. Funding Public Health Achievements and Challenges in Public Health Financing Since the Institute of Medicine’s 2012 Report. *Journal of Public Health Management & Practice*. 2022;28(1):244-255.
8. Orr JM, Leider JP, Singh S, Balio C, Yeager VA, Bekemeier B, **McCullough JM**, Resnick B. Regarding Health: A Healthier Future: Impact of the 2012 Institute of Medicine Finance Report. *Journal of Public Health Management & Practice*. 2022;28(1):316-323.
9. Jehn M, Pandit U, Susanna S, Tompkins C, Kaleta E, Schnall AH, White J, Dale AP, Ross HM, **McCullough JM**, Pepin S, Kenny K, Sanborn H, Heywood N, Lant T, Sunenshine R. Accuracy of Case-Based Seroprevalence of SARS-CoV-2 Antibodies in Maricopa County, Arizona. *American Journal of Public Health*. 2022;112(1):38-42.
10. Jehn M\*, **McCullough JM\***, Dale AP, Gue M, Eller B, Cullen T, Scott SE. Association Between K–12 School Policies and School-Associated COVID-19 Outbreaks—Maricopa and Pima Counties, AZ, July–August 2021. *Morbidity and Mortality Weekly Report*. 2021;70:1372-1373. (\* Co-first authors)
11. Cardona C, Anand NS, Alfonso N, Leider JP, **McCullough JM**, Resnick B, Bishai D. County Health Outcomes Linked to County Spending on Social Services, Building Infrastructure, and Law and Order. *Social Science & Medicine – Population Health*. 2021;16:100930.
12. Alfonso YN, Leider JP, Resnick B, **McCullough JM**, Bishai D. US Public Health Neglected: Flat or Declining Spending in Left States Ill-Equipped To Respond To COVID-19. *Health Affairs*. 2021;40(4):664-671.
13. Speer M, **McCullough JM**, Fielding JE, Faustino E, Teutsch SM. Excess Medical Care Spending: Categorization, Impact and Opportunity Costs. *American Journal of Public Health*. 2020;110(12):1743-1748.
14. **McCullough JM**, Speer M, Magnan S, Fielding JE, Kindig D, Teutsch SM. Reduction in US Health Care Spending Required to Meet the Institute of Medicine’s 2030 Target. *American Journal of Public Health*. 2020;110(12):1735-1740.
15. Leider JP, Meit M, **McCullough JM**, Resnick B, Dekker D, Alfonso NA, Bishai D. The State of Rural Health: Enduring Needs in a New Decade. *American Journal of Public Health*. 2020;110(9):1283-1290.
16. **McCullough JM**, Leider JP, Phillips MA. Integration of Health and Social Services at the Systems-Level: A Model for Addressing Funding and Jurisdictional Silos. *American Journal of Public Health*. 2020;110(S2):197-203.
17. Leider JP, Bishai D, Resnick B, **McCullough JM**, Alfonso YN. Inaccuracy of Official Estimates of Public Health Spending in the United States, 2000-2018. *American Journal of Public Health*. 2020;110(S2):194-196.
18. **McCullough JM**, Leider JP, Resnick B, Bishai D. Aligning US Spending Priorities Using the Health Impact Pyramid. *American Journal of Public Health*. 2020;110(S2):181-185.
19. **McCullough JM**, Curwick K. Local Health and Social Services Spending to Reduce Preventable Hospitalizations. *Health Management*. 2020;23(6):453-458.
20. Sangha P, **McCullough JM**. Trends in School-Level Vaccination Coverage from 2015 to 2018: Increases in Coverage Rates and Declines in Herd Immunity in Arizona. *Vaccine*. 2020;38(25):4071-4078.
21. **McCullough JM**, Sunenshine R, Rusinak R, Mead P, England B. Association of Presence of a School Nurse with 6th grade Immunization Rates in Low-income Arizona Schools in 2014-15. *Journal of School Nursing*. 2020;36(5):360-368. (\* Article received “Editor’s Choice” featured recognition from journal’s editor-in-chief)
22. **McCullough JM**, Eisen-Cohen E, Lott B. Measuring Collaboration Across Public Health Services: A New Measure of the Relational Coordination Measure to Public Health. *Health Care Management Review*. 2020;45(1):60-72.
23. **McCullough JM**. Government Health and Social Services Spending Show Evidence of Single-Sector Rather Than Multi-Sector Pursuit of Population Health. *Inquiry*. 2019;56:1-12.
24. **McCullough JM**. Declines in Spending Despite Positive Returns on Investment: Understanding Public Health’s Budget Problem. *Frontiers in Public Health*. 2019;7:159.
25. **McCullough JM**, Leider JP. Using Public Expenditure Data to Predict Health Outcomes in National Rankings: Progress, Pitfalls, and Potential Policy Impacts. *Journal of Public Health Management & Practice*. 2019;25(4):308-315.
26. **McCullough JM**, Narain K, Rhoads N, Fielding JE, Teutsch SM, Zimmerman FJ. Quantifying the value of public health departments’ quantitative and economic modeling capacity. *Journal of Public Health Management & Practice*. 2019;25(4):18-26.
27. **McCullough JM**, Speer MJ, Teutsch SM, Fielding JE. Non-Clinical Prevention Opportunities and Waste in the US Healthcare System. *American Journal of Preventive Medicine*. 2019;56(6):904-907.
28. **McCullough JM**, Coult N, Genau M, Raikhelkar A, Love K, Riley WJ. Safety Net Representation in Federal Health and Care Delivery Reform Initiatives. *American Journal of Accountable Care*. 2019;7(1):16-22.

29. **McCullough JM**. The Financial and Business Analysis Capacities of the State and Local Public Health Workforce. *Journal of Public Health Management and Practice*. 2019;25(2):S145-S156.
30. **McCullough JM**, Leider JP. Health and social service spending and health outcomes in Texas, 2010-2016. *Substance Use and Misuse Journal*. 2019;112(2):91-97.
31. **McCullough JM**, Singh SR, Leider JP. The Importance of Hospital Services and Governmental Public Health and Social Services Spending for Improving Community Health Outcomes. *Journal of Public Health Management and Practice*. 2019;25(4):348-356.
32. **McCullough JM**, Fowle N, Sylvester TL, Kretschmer M, Ayala A, Popescu S, England B. Cost Analysis of Concurrent Public Health Response Events: Financial Impact of Measles Outbreak, Super Bowl Surveillance, and Ebola Surveillance in Maricopa County. *Journal of Public Health Management and Practice*. 2019; 25(4):357-365.
33. Leider JP, Alfonso N, Resnick B, Brady E, **McCullough JM**, Bishai D. Assessing the value of 40 years of local public expenditures on health. *Health Affairs*. 2018;37(4):560-569.
34. Mohamed A, Alhanti B, **McCullough JM**, Goodin K, Rolling K, Glickman L. Temporal association of implementation of Arizona Health Care Cost Containment System Reform with changes in dental-related emergency department visits in Maricopa County from 2006-2012. *Journal of Public Health Dentistry*. 2018;78(1):49-55.
35. **McCullough JM**, Leider JP. Associations Between County Wealth, Health and Social Services Spending, and Health Outcomes. *American Journal of Preventive Medicine*. 2017;53(5): 592-598.
36. **McCullough JM**. Local Health and Social Services Expenditures: An Empirical Typology of Local Government Spending. *Preventive Medicine*. 2017;107:66-72.
37. Dahlen HM, **McCullough JM**, Fertig AR, Dowd BE, Riley WJ. Texas Medicaid Payment Reform: Fewer High-Risk Deliveries and Increased Gestational Age. *Health Affairs*. 2017;36(3): 460-467.
38. **McCullough JM**, Leider JP. Government Spending In Health And Nonhealth Sectors Associated With Hospital Inpatient County Health Rankings. *Health Affairs*. 2016;35(11): 2037-2043.
39. Riley WJ, Meredith L, Price R, Miller KM, Begun J, **McCullough JM**, Davis S. Decreasing Malpractice Claims to Reduce Preventable Perinatal Harm. *Health Services Research*. 2016;51(S3):2453-2471.
40. Riley WJ, Begun J, Meredith L, Miller K, Connolly K, Price R, Muri J, **McCullough JM**, Davis S. Integrated Approach to Reduce Perinatal Adverse Events: Standardized Processes, Teamwork Training and Performance Feedback. *Health Services Research*. 2016;51(S3):2431-2452.
41. **McCullough JM**, Goodin K. Clinical Data Storage by Local Health Departments: A National Survey of Backup and Storage Systems. *Journal of Public Health Management & Practice*. 2016;22(6): S18-S26.
42. Shah GH, Vest JR, Lovelace KA, **McCullough JM**. Local Health Departments' Partners in Electronic Data Exchange. *Journal of Public Health Management & Practice*. 2016;22(6): S44-S50.
43. Dahlen HM, **McCullough JM**, Fertig AR, Dowd B, Riley W. The Effect of Hard-Stop Medicaid Payment Reform on Early Elective Deliveries. *Journal of Patient-Centered Research and Reviews*. 2016;3(3):209.
44. **McCullough JM**, Eisen-Cohen E, Salas SB. Partnership Capacity for Community Health Improvement Implementation: Findings from a Social Network Analysis. *BMC Public Health*. 2016;16:566.
45. **McCullough JM**. Timing of Clinical Billing Reimbursement for a Local Health Department. *Public Health Reports*. 2016;131(2):283-289.
46. **McCullough JM**, Riley WJ. Evolution of the Nation's Blood Supply System. *Transfusion*. 2015;55:1461.
47. **McCullough JM**. National Trends in Clinical Billing by Local Health Departments. *Frontiers in Public Health & Systems Research*. 2016;5(2):12-18.
48. **McCullough JM**, Kaplan B. A Random Walk through Large Data: Caveats Regarding the Potential for False Inference. *Transplantation*. 2016;100(1):18-22.
49. **McCullough JM**, Leider JP, Riley WJ. Local Fiscal Allocation for Local Public Health Departments. *American Journal of Preventive Medicine*. 2015;49(6):921-929.
50. **McCullough JM**. Successful Academic-Public Health Practice Collaboration: What Works from the Public Health Workforce's Perspective. *Journal of Public Health Management and Practice*. 2015;21(6):S121-S129.
51. **McCullough JM**, Zimmerman FJ, Bell DS, Rodriguez HP. Local Public Health Department Adoption and Use of Electronic Health Records. *Journal of Public Health Management and Practice*. 2015;21(1): 20-28.
52. **McCullough JM**, Zimmerman FJ, Rodriguez HP. Impact of clinical decision support on receipt of antibiotic therapy for acute bronchitis and upper respiratory tract infection. *Journal of the American Medical Informatics Association*. 2014;21:1091- 1097.
53. **McCullough JM**, Goodin, K. Patterns and Correlates of Public Health Informatics Capacity Among Local Health Departments: An Empirical Typology. *Online Journal of Public Health Informatics*. 2014;6(3)e199.
54. **McCullough JM**, Bell D, Zimmerman FJ, Rodriguez HP. Electronic Health Information Exchange in Urban Settings: Examining two initiatives in small physician practices & community health centers. *BMC Health Services Research*. 2014;14:415-424.

55. Rodriguez HP, **McCullough JM**, Hsuan C. Local Health Department Collaborative Capacity for Partnering to Improve Population Health. *Frontiers in Public Health Services & Systems Research*. 2014;3(4):1-7.
56. **McCullough JM**, Zimmerman F, Fielding J, Teutsch S. A Health Dividend for America: The Opportunity Cost of Excess Medical Expenditures. *American Journal of Preventive Medicine*. 2012;43(6):650-654.
57. Riley WJ, Briggs J, **McCullough JM**. Estimating The Financial Resources Needed for Local Public Health in Minnesota: A Multi-Method Approach. *Journal of Public Health Management and Practice*. 2011;17(5), 413-420.
58. Ayyoubi MT, Konstenius T, **McCullough JM**, et al. Status of Blood Banking and the Blood Supply in Afghanistan. *Transfusion*. 2010;50(3):566-574.
59. Riley W, Miller K, Davis S, **McCullough JM**. A Model for Developing High Reliability Teams. *Journal of Nursing Management*. 2010;18(5):556-563.
60. Pfeuffer J, **McCullough JM**, Van de Moortele, K, et al. Spatial dependence of the nonlinear BOLD response to short stimulus duration. *Neuroimage*. 2003;8(4):990-1000.

#### EDITORIALS, WHITE PAPERS, & POLICY BRIEFS:

- McCullough JM**, Leider JP, Resnick B, Bishai D. “Following the Great Recession, Governments Spent More On Law & Order And Less On Health & Social Services.” *JPHMP Direct*. <https://jphmpdirect.com/2020/09/21/following-the-great-recession-governments-spent-more-on-law-and-order-and-less-on-health-and-social-services/>
- Leider JP, Yeager VA, Orr J, Balio CP, Bekemeier B, **McCullough JM**, Resnick B, Simone S. *Characterizing the Impact of the 2012 Institute of Medicine Report on Public Health Finance*. Washington, DC: Public Health National Center for Innovations. October 2019.
- McCullough JM**. “2019 Budget: What Mexico’s President-Elect Andrés Manuel López Obrador should do for public health.” *Alto Nivel*. November 8, 2018. <https://www.altonivel.com.mx/economia/presupuesto-2019-lo-que-deberia-plantear-aml-para-la-salud-publica/>
- McCullough JM**. *The Return on Investment of Public Health System Spending*. Washington, DC: AcademyHealth. June 2018. [https://www.academyhealth.org/sites/default/files/roi\\_public\\_health\\_spending\\_june2018.pdf](https://www.academyhealth.org/sites/default/files/roi_public_health_spending_june2018.pdf)
- McCullough JM**. *Integration for Arizona’s Children and Youth with Special Health Care Needs*. Conference White Paper for the Annual “Opening the Doors Conference: Solutions to Prepare Your Practice for People with Special Needs.” Phoenix, AZ. 2014.
- Pourat N, Martinez A, **McCullough JM**, et al. *Cost of Maternal Hemorrhage in California*. Los Angeles, CA: UCLA Center for Health Policy Research. October 2013.
- Kominski GF, **McCullough JM**, Grace SM, Martinez AE. *Evaluation of the California Healthcare-Associated Infection Prevention Initiative*. Los Angeles, CA: UCLA Center for Health Policy Research, 2011.

#### BOOK CHAPTERS

- Riley W & **McCullough JM**. “Process Analysis for Public Health.” In Moran J & Duffy G. *Quality Function Deployment and Lean-Six Sigma Applications in Public Health*. ASQ Press, Milwaukee, WI. 2010.

#### GRANTS & RESEARCH FUNDING

- |           |  |
|-----------|--|
| 2020-2022 | “Multi-Dimensional COVID-19 Control in US: Systems Alignment in High-Performing Counties”<br>Role: Co-Investigator<br>Funder: Robert Wood Johnson Foundation<br>Total Award: \$250,000   |
| 2019-2021 | “Physicians’ Use, Exchange, and Evaluation of Electronic Health Data”<br>Role: Principal Investigator<br>Funder: Centers for Medicare and Medicaid Services via Arizona Health Care Cost Containment System<br>Total Award: \$253,072        |
| 2019-2021 | “Can Investments in the Social Determinants of Health Bend the Cost Curve?”<br>Role: Co-Principal Investigator<br>Funder: Health Care Cost Institute<br>Total Award: N/A – <i>Competitive data access award – In-kind valuation \$70,000</i> |
| 2017-2022 | “Economic Analyses to Promote Local Public Health Department Efficiency”<br>Role: Principal Investigator<br>Funder: Maricopa County (AZ) Department of Public Health   |

2018-2020 Total Award: \$276,989  
 “Investigating Waste in the U.S. Health Care System”  
 Role: Principal Investigator  
 Funder: Fielding Charitable Trust  
 Total Award: \$123,904

2018-2020 “Advanced Methods to Facilitate Goal Alignment and Attainment Among Multisector Stakeholders”  
 Role: Co-Investigator  
 Funder: Robert Wood Johnson Foundation  
 Total Award: \$1,000,000

2017-2021 “Positioning the Safety Net Advancement Center for Sustainability”  
 Role: Co-Principal Investigator  
 Funder: Robert Wood Johnson Foundation  
 Total Award: \$1,000,000

2017-2019 “Analyzing state and local governmental health, public health, social and community service spending for system alignment to reduce health disparities”  
 Role: Co-Investigator & Site PI  
 Funder: Robert Wood Johnson Foundation  
 Total Award: \$250,000 (Site-PI portion: \$27,002)

2017-2019 “Connecting Local Governmental Finances to Local Health Outcomes in Texas”  
 Role: Principal Investigator  
 Funder: Episcopal Health Foundation  
 Total Award: \$127,585

2017-2018 “Integrating Spending Data into the County Health Rankings: Barriers, Solutions, and Implications for Rankings.”  
 Role: Principal Investigator  
 Funder: County Health Rankings & Roadmaps *via Robert Wood Johnson Foundation*  
 Total Award: \$52,572

2016-2018 “Action Research Center for a Culture of Health: Financing and Service Delivery Integration.”  
 Role: Co-Investigator  
 Funder: Robert Wood Johnson Foundation  
 Total Award: \$997,769

2015-2017 “The National Safety Net Payment and Service Delivery Reform Center”  
 Role: Co-Investigator  
 Funder: Robert Wood Johnson Foundation  
 Total Award: \$1,399,925

2015-2016 “County Health Rankings and Local Governmental Finances: Are Rankings Always Linked to Wealth?”  
 Role: Principal Investigator  
 Funder: County Health Rankings & Roadmaps *via Robert Wood Johnson Foundation*  
 Total Award: \$49,662

2014-2015 “Healthy Babies: Evaluation of State Policies to Limit Elective Induction of Labor”  
 Role: Co-Principal Investigator  
 Funder: Medica Research Institute  
 Total Award: \$74,881

2013-2014 “Health Information Exchange in Small Primary Care Practices: Understanding and Eliminating the Disparity”  
 Role: Co-Investigator  
 Funders: UCLA & University of Minnesota Clinical & Translational Science Institutes  
 Total Award: \$60,000

2013-2014 “Adoption and Use of Health Information Technology in Three Settings.” UCLA Graduate Division Dissertation Year Fellowship.  
 Total Award: \$34,809 (Chair: Hector Rodriguez)

2012-2013 Graduate Research Fellowship, UCLA Fielding School of Public Health.  
 Total Award: \$34,620 (Chair: Hector Rodriguez)



2010-2012	Pre-Doctoral Research Traineeship, Agency for Healthcare Research & Quality. Total Award: \$72,000
2009-2010	“Creating High Reliability Teams for Public Health Practice & Preparedness: Simulations, Exercises, and Effective Education.” Role: Research Assistant Funder: Centers for Disease Control and Prevention, P01 Total Award: \$1,481,000
2008-2010	“Public Health Impact: Building the Evidence Base for Public Health Accreditation and Quality Improvement.” Role: Research Assistant Funder: Robert Wood Johnson Foundation Total Award: \$600,000

### SELECTED AWARDS & RECOGNITION

#### Awards & Honors:

2022 ASU College of Health Solutions Teaching Award. *The College's top teaching award, given annually to the College's top overall teacher*  
2021 ASU Translational Science Award. *Awarded annually for demonstrated excellence in translational research and social and clinical impacts.*

“40 Under 40 in Public Health” Awardee as selected by de Beaumont Foundation

*(one of only three awardees from a university to be named to the inaugural list of top public health practitioners)*

2019 ASU College of Health Solutions Nominee for NIH Office of Disease Prevention Early-Stage Investigator Lecture

*(selected as College's only nominee for prestigious NIH early-career lectureship)*

2018-19 Educator of the Year, ASU Science of Health Care Delivery Masters Program

*(voted by students and awarded to top faculty member in program)*

Finalist, 11<sup>th</sup> Annual RWJF National Award for Outstanding Epidemiology Practice in Addressing Racial and Ethnic Disparities, 2018

Chair, AcademyHealth Public Health Systems Research Advisory Committee, 2017-2019

AcademyHealth Best Abstract Award for Public Health Systems Research, 2016

Faculty Marshal, 2015 Arizona State University Commencement ceremony

Mentor, 2014 & 2015 AcademyHealth Public Health Systems Research Scholar

UCLA Dean's Outstanding Student Award, 2014 *(awarded to top health policy and management graduate at UCLA)*

Finalist, Carolbeth Korn Prize, 2013-2014 *(awarded to top public health graduate at UCLA)*

Barbara Ann Walton Spradley Leadership Award, 2010 *(awarded to graduate for demonstrated excellence in leadership)*

Member, Delta Omega Public Health Honor Society *(inducted in 2010)*

#### Fellowships:

UCLA Dissertation Year Fellowship, 2013-2014

UCLA Graduate Research Fellowship, 2012-2013

AHRQ Pre-Doctoral UCLA-RAND Health Services Research Traineeship, 2010 – 2012

Walter H. Judd International Graduate Fellowship, 2009

### TEACHING ACTIVITIES

#### **Teaching Awards**

2019 Educator of the Year, ASU Science of Health Care Delivery Masters Program

*(voted by students and awarded to top faculty member in program)*

#### **Courses Taught at ASU**

##### Spring 2022

Biostatistics & Data Management (Online) for Behavioral Health. HCD 501. 3 credits

Biostatistics & Data Management (Online) for Health Care Delivery Science. HCD 501. 3 credits

Fall 2021

Biostatistics & Data Management. HCD 501. 3 credits

Biostatistics & Data Management (Online) for Behavioral Health. HCD 501. 3 credits

Spring 2021

Biostatistics & Data Management (Online). HCD 501. 3 credits

Fall 2020

Global Health Care Systems. HCD 303. 3 credits

Biostatistics & Data Management. HCD 501. 3 credits

Spring 2020

Biostatistics & Data Management (Online). HCD 501. 3 credits

Fall 2019

Biostatistics & Data Management. HCD 501. 3 credits

Spring 2019

Biostatistics & Data Management (Online). HCD 501. 3 credits

Fall 2018

Biostatistics & Data Management. HCD 501. 3 credits

Interpreting the Scientific Literature (Online). HCD 400. 3 credits

Spring 2018

Biostatistics & Data Management. HCD 501. 3 credits

Biostatistics & Data Management (Online). HCD 501. 3 credits

Fall 2017

Evaluation of Health Sciences Research. HSC 420. 3 credits

Honors Thesis. HCD 493. 3 credits

Spring 2017

Honors Directed Study. HCD 492. 3 credits

Fall 2016

Health Behavior and Statistical Tools in Health Environments. HCD 501. 4 credits

Biostatistics. HCD 300/PUBH 300. 3 credits

Health Behavior and Statistical Tools in Health Environments (Online). HCD 501. 4 credits

Spring 2016

Introduction to the Science of Health Care Delivery. HCD 100. 3 credits

Honors Thesis. HCD 493. 3 credits

Fall 2015

Health Behavior and Statistical Tools in Health Environments. HCD 501. 4 credits

Honors Directed Study. HCD 492. 3 credits

Introduction to the Science of Health Care Delivery. HCD 100. 3 credits

Spring 2015

Health Behavior and Statistical Tools in Health Environments (Online). HCD 501. 4 credits.

Introduction to the Science of Health Care Delivery. HCD 100. 3 credits

**Students Mentored**

*Note: The MS program in which I teach at ASU does not offer a PhD degree. I have been active in student mentorship through work as lead/co-lead mentor on more than 40 masters-level student capstone projects. I have also sought out multiple undergraduate honors students serve on PhD dissertation committees for two ASU students*

PhD Dissertation Committees:

Adrienne Madhavpeddi, MS, ASU Health Innovation PhD Student  
Shalini Sivanandam, MBBS MS, ASU Biomedical Informatics PhD Student

Barrett Honors Thesis Committees:

2019 Pooja Sangha  
2016-17 Asha Devineni  
2015-16 Thida Hnin

SHCD Masters Capstone Project Mentor – serve as lead mentor for SHCD for projects listed below

2019-20 Andrea Medina & Morgan Nelson  
2018-19 Melina Cox-Ferreras, Laurin Skinner, & Christy Thomas  
2017-18 Gabriela Barraza & Ryan Melikian  
Rachel Brueckner  
Randall Fortuna  
Shelby Murphy & Katherine Rice  
Siavosh Naji-Talakar

**PROFESSIONAL & SERVICE ACTIVITIES**  
*At request of SHCD Capstone director, served in role as co-lead mentor for all masters students' projects. Met with, advised, and*

**Professional Service Activities**

Member (elected), Board of Directors, Arizona Public Health Association, 2020-22  
Member, National Health Care Expenditure Collaborative, National Academy of Medicine Population Health Roundtable, 2019-current

2016-17 *served as research design & statistical consulting mentor for more than 30 students' projects*  
2015-16 Joe Brinkman & Matthew Speer  
Lisette Guerrero & Ashley Jones-Wilkerson  
2014-15 Haleigh Wolfe

Chair, AcademyHealth Public Health Systems Research Interest Group National Advisory Committee, 2017-19  
Member (elected), AcademyHealth Public Health Systems Research Interest Group National Advisory Committee, 2016-17  
Grand Judge, Intel International Science and Engineering Fair, 2016

**Ad Hoc Peer Reviewer**

American Journal of Infection Control  
American Journal of Managed Care  
American Journal of Public Health  
Biomedical Informatics Insights  
BMC Medical Informatics & Decision Making  
BMC Health Services Research  
Evaluation & Program Planning  
Family Medicine & Community Health  
Frontiers in Public Health Services & Systems Research  
Health Affairs  
Health Care Management Review  
Health Services Research  
International Journal of Health Policy & Management  
Journal of Health Care for the Poor and Underserved  
Journal of Public Health Management & Practice  
PLoS ONE  
Preventing Chronic Disease  
Public Health Reports

Quality Management in Health Care  
 The Social Science Journal  
 Social Science & Medicine  
 Social Science & Medicine – Population Health  
 Vaccine

**Department-, College-, and University-Level Service Activities**

Chair, Search Committee for ASU Professor in Health Care Delivery, 2021  
 Chair, Search Committee for ASU Science of Health Care Delivery program director, 2021  
 Chair, Search Committee for ASU-Mayo Clinic Professor in Health Care Delivery, 2020  
 Chair, HCD-HSC-MED-MIHM Student Success Committee, 2020-2022  
 Member, CHS Community Advisory Board Committee, 2020-2021  
 Member (Ad Hoc), CHS Personnel Committee, 2020  
 Member, HCD Graduate Curriculum Committee, 2019-2022  
 Chair, Search Committee for Associate Professor in Health Systems, 2019  
 Member, Search Committee for Lecturer in Health Policy, 2019  
 Member, Search Committee for Associate Professor in Population Health, 2018-19  
 Member, CHS Research Operations Committee, 2018  
 Member, CHS Faculty Affinity Network Committee, 2018  
 Member, CHS Dean's Executive Vision Team, 2017-2020  
 Chair, SHCD Standards Committee, 2016-2018  
 Member (elected), SHCD Policy & Personnel Committee, 2016-2018  
 Member, Search Committee for Assistant Professor in SHCD, 2016-17  
 Mentor, ASU American Indian Student Services Mentor U Program, 2015-17  
 Member, Search Committee for Assistant Professor in SHCD, 2015-16  
 Marshal, College Marshal representing the College of Health Solutions at ASU Fall Convocation  
 Member, SHCD Curriculum Committee, 2014-16  
 Member, SHCD Standards Committee, 2014-16  
 Member, Search Committee for Director of the School for the Science of Health Care Delivery, 2014-15

**PROFESSIONAL PRESENTATIONS**

2022

Public Health and the Wrong Pocket Problem. Invited lecture for Georgia State University DrPH Program. February 17.  
 Arizona Health Care Workforce: Trends in HIE & ACO Adoption. ASU Center for Health Information & Research  
 Annual Community Stakeholder Meeting. Phoenix, AZ. January 24.  
 Mandates: Why Are They a Health Care Issue? ASU Health Talks Colloquium Seminar Series. Phoenix, AZ. January 20.

2021

Quantifying Avoidable COVID-19 Deaths in U.S. Counties in 2020. Presentation at American Public Health Association  
 Annual Meeting. Denver, CO. October 25. Co-author.  
 Staffing Up Public Health: Estimating the Workforce Needed to Provide Public Health Services for American.  
 Presentation at 17<sup>th</sup> Annual Public Health Finance Roundtable. American Public Health Association. Denver, CO.  
 October 24.  
 COVID-19 Update from Last Year, Looking Forward to Next Year. Panel presentation. Arizona Wellbeing Common  
 Conference 2021. Phoenix, AZ. October 8.  
 SARS-CoV-2 Seroprevalence Studies in the United States: Methodological Challenges and the Need for a Coordinated  
 National Strategy. Poster presentation at Society for Epidemiologic Research Annual Meeting. June 22.  
 Keynote presentation. Legal and Public Health Solutions for Pandemic Safety at Live Events. Virtual panel presentation to  
 MemberSuite's Event Farm series. March 16. (*Attendance of 250+*)  
 "A Health Dividend for America." Podium presentation to U.S. Health Care Expenditures: Costs, Lessons, and  
 Opportunities. National Academy of Medicine. Washington, DC. March 15.

Keynote presentation. Public Health and Logistical Approaches to Pandemic Compliance and Safety at Live Events.

Virtual panel presentation to MemberSuite's Event Farm series. February 23. (*Attendance of 500+*)  
2020

Reduction in US Health Care Spending Required to Meet the Institute of Medicine's 2030 Target. Podcast interview with  
*American Journal of Public Health* Editor-in-Chief Alfredo Morabia. November 12.

Trends in Arizona Physician Use of EMR & HIE. Presentation to Arizona Health Care Cost Containment System  
Leadership. November 6.

Association of Presence of a School Nurse with Increased Sixth-Grade Immunization Rates in Low-Income Arizona  
Schools in 2014–2015. Podcast interview with *Journal of School Nursing* Editor-in-Chief Julia Muennich Cowell. October  
15.

Facilitators & Barriers to Investing in Public Health & Social Services. Accepted for poster presentation at AcademyHealth  
Annual Research Meeting Public Health Systems Research Interest Group panel. Boston, MA. June 13. *Conference  
cancelled due to COVID-19*

Achievements, Challenges, and Recommendations in Public Health: Perceptions and Reflections Since the Institute of  
Medicine's 2012 Report on Public Health Financing. Accepted for podium presentation at AcademyHealth Annual  
Research Meeting Public Health Systems Research Interest Group panel. Boston, MA. June 13. (Co-author) *Conference  
cancelled due to COVID-19*

Collaborative Data Design: Using Data Visualizations for Multisector Alignment and Policy Change. Accepted for poster  
presentation at 18<sup>th</sup> Open Forum for Public Health Improvement and Innovation (co-presenter). Kansas City, MO.  
March 26. *Conference cancelled due to COVID-19*

Fresh insight into the largest untapped market in urgent care. Keynote presentation at 12th Annual ConvUrgentCare On-  
Demand Strategy Symposium. Scottsdale, AZ. January 29.  
2019

Pursuing Innovative Workforce Partnerships: Finding Win-Win Solutions Across Public Health and Academia. Keynote  
presentation at Public Health Department-Academic Partnership Summit. Las Vegas, NV. December 3.

System-Level Public Health and Social Service Alignment: ROI of Multi-Sector Upstream Prevention Focus. Presentation  
to Ramsey County (MN) Departments of Public Health and Human Services. St. Paul, MN. November 14.

Advancing Health Through Cross-Sector Collaboration: Impacts of the 'Soft' Side of Policies, Systems, and Environments.  
Invited presentation to Vitalyst Health Foundation. Phoenix, AZ. November 11.

Health Departments as Conveners: Data Sharing for Impact. Podium presentation at All In: Data for Community Health  
National Meeting. Baltimore, MD. October 17. (Co-author)

Meeting the Institute of Medicine's 2030 US Per Capita Health Care Spending Target. Keynote presentation to the  
National Academy of Medicine Roundtable on Population Health Improvement's Health(care) Expenditure  
Collaborative. Webinar presentation on October 10.

Trends in Vaccination Uptake at Arizona Schools & Public Health Implications of Declining Herd Immunity. Presentation  
to Maricopa County Department of Public Health. Phoenix, AZ. August 20.

Estimating the Effect of County Spending on Life Expectancy at Birth in the U.S. Podium presentation at International  
Health Economics Association World Congress. Basel, Switzerland. July 13. (Co-author)

Advancing Health, Reducing Waste: A Crosswalk Analysis and Taxonomy of Excess Health Care Spending. Poster  
presentation at AcademyHealth Annual Research Meeting. Washington, DC. June 3.

Reducing Low Birth Weight Deliveries through Targeted Health and Social Spending. Poster presentation at  
AcademyHealth Annual Research Meeting. Washington, DC. June 2.

State of the Public Health Systems Research Interest Group & Future Directions for PHSR. AcademyHealth Public Health  
Systems Research Interest Group Annual Meeting. Washington, DC. June 1.

Low birth weight deliveries and spending on general social and public health programs. AcademyHealth Public Health  
Systems Research Interest Group Annual Meeting. Washington, DC. June 1. (Co-author)

Featured Discussant for Security and Sustainability Forum Webinar on Smart Sewers for Smart Cities: How Data-Mining Sewage Can Improve Public Health. May 22.

Estimating the Effect of County Spending on Life Expectancy through Structural Equation Modeling. Population Association of America Annual Meeting. Austin, TX. April 10. (Co-author)

Building Academic-Practice Based Partnerships and Advancing the Use of Evidence in the Public Health Practice Realm. Invited presentation to Seattle-King County Public Health Department. Seattle, WA. March 19.

Public Health & Social Services' Contributions to Improved Population Health. Invited presentation to University of Washington School of Nursing Department of Psychosocial and Community Health & School of Public Health Department of Health Services. Seattle, WA. March 18.

2018

Impact of Social Spending on County Health in East Texas. Keynote presentation at Episcopal Health Foundation Community Health Symposium. Nacogdoches, TX. November 30.

Public Health Investments and Pregnancy Outcomes. Podium presentation at 14th Annual American Public Health Association (APHA) Public Health Finance Roundtable. San Diego, CA. November 11.

Community Health Center Challenges and Strategies for Payment and Care Delivery Reform Progress. Panel presenter at California Collective Insight Forum. Oakland, CA. November 6.

Measuring Collaboration in Your Organization. American Evaluation Association Annual Conference. Cleveland, OH. November 2. (Co-author)

Evaluating & Assessing Health Technologies. Guest Lecture for ASU Biomedical Informatics 601 course. Phoenix, AZ. September 26.

Aftermath of Silo-Busting: Measuring Collaboration in Your Organization Using Relational Coordination. Breakout session during National Network for Public Health Institutes' Public Health Improvement Training. Atlanta, GA. June 27. (Co-author)

Measuring System Integration Using Multisector Claims-Based Network Analysis: Differences in Network Structure for Persons with and without Serious Mental Illness. Poster symposium presentation at 35<sup>th</sup> AcademyHealth Annual Research Meeting. Seattle, WA. June 25.

**\*\*\* Featured as most impactful poster by theme review committee \*\*\***

Public Health and Social Services Expenditures Lead to Reductions in Preventable Admission Rates. Podium presentation at 35<sup>th</sup> AcademyHealth Annual Research Meeting. Seattle, WA. June 24.

Local Government Spending and Hospital Health Promotion Activities Are Associated with Better Health Outcomes. Poster presentation at 35<sup>th</sup> AcademyHealth Annual Research Meeting. Seattle, WA. June 25.

Emergency Department Use in Maricopa County Suggests Racial and Ethnic Disparities in Access to Primary Care. Poster presentation at 35<sup>th</sup> AcademyHealth Annual Research Meeting. Seattle, WA. June 24.

Optimizing Governmental Health and Social Spending Interactions. Podium presentation at 17<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. Seattle, WA. June 23.

**\*\*\* Received "Best Of" award for all abstracts submitted to AcademyHealth Interest Meetings \*\*\***

Public Health and Social Services Expenditures Lead to Reductions in Preventable Admission Rates. Poster presentation at 17<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. Seattle, WA. June 23.

Public Health System Integration: A Multisector Claims-Based Analysis of Network Structure for Persons with and without Serious Mental Illness. Poster presentation at 17<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. Seattle, WA. June 23.

Emergency Department Use in Maricopa County Suggests Racial and Ethnic Disparities in Access to Primary Care. Podium presentation at Council of State and Territorial Epidemiologists Annual Conference. West Palm Beach, FL. June 8.

**\*\*\* Finalist for 11<sup>th</sup> Annual RWJF National Award for Outstanding Practice in Addressing Racial and Ethnic Disparities \*\*\***

Synergistic Institutionalism in Public and Private Contributions to Population Health. Podium presentation and discussion at 20<sup>th</sup> Annual Organization Theory in Health Care (OTHC) Association Conference. Johns Hopkins University, Baltimore MD. June 8.

**\*\*\* Featured as one of only 5 abstracts during conference to receive full podium with discussant**

**\*\*\***

Economic and Quantitative Modeling: Methods, Challenges, and Opportunities. UCLA Fielding School of Public Health. Los Angeles, CA. May 9.

Can Government Investment in Health and Social Services Improve Public and Private Sector Contributions to Preventable Admissions Rates? Podium presentation at 75<sup>th</sup> Annual Meeting of the Association for Prevention Teaching and Research. Philadelphia, PA. April 10. (Co-author)

Investing to Promote Health: Impact of Local Government Spending in Texas on Population Health. Seminar presentation at Rice University BioScience Research Collaborative. Houston, TX. March 21.

Patterns and Trends in Preventable Emergency Department Visits in Maricopa County. Presentation to Maricopa County Coordinated Community Health Needs Assessment Working Group. Phoenix, AZ. March 12.

Optimizing Governmental Health and Social Spending Interactions. Discussant. Robert Wood Johnson Foundation Systems for Action National Coordinating Center Research Webinar. January 24.

2017

Local Government Spending and Hospital Health Promotion Activities Associated with Better Health Outcomes. Podium presentation at 13<sup>th</sup> Annual Public Health Finance Roundtable at the American Public Health Association Annual Meeting. Atlanta, GA. November 5.

Payment and Care Delivery Reform for Safety Net Providers. Plenary podium presentation at 17<sup>th</sup> Annual National Rural Health Association Critical Access Hospital Conference. September 27. Kansas City, MO.

Preparing for and Succeeding in Payment and Care Delivery Reform: Guidance for Tribal Health Leaders. Podium presentation at 34<sup>th</sup> Annual National Indian Health Board Tribal Health Conference. Bellevue, WA. September 26.

Making Payment and Care Delivery Reform Work: Lessons Learned in Alabama and Illinois. Webinar presentation with The National Council for Behavioral Health. August 15.

Making Strides in Payment and Delivery Reform. Webinar presentation with the National Association of Community Health Centers. July 21.

Measuring Collaboration Within a Health Department: Impacts of the Maricopa County Department of Public Health Re-Organization. Presentation to Maricopa County Department of Public Health Director and Disease Control Division. Phoenix, AZ. July 19.

Public Health and Social Services Spending versus Population Health Outcomes. Poster presentation at 34<sup>th</sup> AcademyHealth Annual Research Meeting. New Orleans, LA. June 26.

Measuring Collaborative Capacity, Organizational Culture, & Collaboration. Poster presentation at 34<sup>th</sup> AcademyHealth Annual Research Meeting. New Orleans, LA. June 25.

Longitudinal Impact of Public Health and Social Services Spending on Health Outcomes. Measuring Organizational Culture and Internal Collaboration at a Public Health Department. Podium presentation at 16<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. New Orleans, LA. June 24.

Measuring Organizational Culture and Internal Collaboration at a Public Health Department. Podium presentation at 16<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. New Orleans, LA. June 24.

Assessing the value of forty years of local governmental expenditures on health: can we spend more wisely? Poster presentation at 16<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. New Orleans, LA. June 24. (Co-author)

Payment Reform for Safety Net Organizations: Overview of Approaches and Resources for Providers. Presentation at Arizona Alliance for Community Health Centers & Member FQHCs. Phoenix, AZ. June 22.

Collaborative Capacity and Readiness for Population-Focused Health Activities. Poster presentation at 19<sup>th</sup> Annual Organization Theory in Health Care Association Conference. Berkeley, CA. June 15.

Do Local Public Health and Social Services Spending Impact Local Health Outcomes? Podium presentation at Council of State and Territorial Epidemiologists Annual Conference. Boise, ID. June 7.

Impact of Medicaid Policy Change on Incidence of Early Elective Deliveries. Podium presentation at Council of State and Territorial Epidemiologists Annual Conference. Boise, ID. June 6.

Does Public Investment in Public Health & Social Services Lead to Better Health Outcomes? Seminar presentation at ASU School of Nutrition and Health Promotion. Phoenix, AZ. January 12.

Removing Barriers to Learning Statistics: Use of Excel versus SPSS. Presentation at 2<sup>nd</sup> ASU Learning Innovation Showcase, hosted by Knowledge Enterprise Development (OKED) and the Institute for the Science of Teaching and Learning (ISTL). Tempe, AZ. January 11.

2016

Applied Health Economics Analyses to Inform Local Public Health Practice. Presentation at CDC Career Epidemiology Field Officer Annual Conference. Atlanta, GA. November 15.

Impact of Governmental Spending on Local Health Outcomes. Presentation on Findings from article published in *Health Affairs*. Invited briefing. Washington, DC. November 10.

Effect of Medicaid Payment Reform on Early Elective Deliveries. Podium presentation at 144<sup>th</sup> American Public Health Association Annual Meeting. Denver, CO. November 1.

Action Research Center for a Culture of Health: Financing and Service Delivery Integration. Podium presentation at 144<sup>th</sup> American Public Health Association Annual Meeting. Denver, CO. October 31. (Co-author)

Wealth Doesn't Always Cause Health: Associations Between Community Wealth, Community Investments, and Community Health. Poster presentation at 144<sup>th</sup> American Public Health Association Annual Meeting. Denver, CO. October 31.

Payment Reform Challenges & Opportunities for the Safety Net Sector. Panel Moderator at CMS National Payment Reform Summit. Washington, DC. October 25.

The Effect of Hard Stop Medicaid Payment Reform on Early Elective Deliveries. Podium presentation at 33<sup>rd</sup> AcademyHealth Annual Research Meeting. Boston, MA. June 28. (Co-author)

Integrating Delivery and Financing Systems across Sectors to Build a Culture of Health. Podium presentation at 33<sup>rd</sup> AcademyHealth Annual Research Meeting. Boston, MA. June 26. (Co-author)

Wealth Doesn't Always Cause Health: Associations Between Community Wealth, Community Investments, and Community Health. Presentation at 15<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. Minneapolis, MN. June 25.

**\*\*\*Received Best PHSR Abstract Award for receiving highest overall score on all abstracts submitted to meeting\*\*\***

Association of Presence of a School Nurse with Increased 6th Grade Immunization Rates in Low-Income Arizona Schools. Podium presentation at Council of State and Territorial Epidemiologists Annual Conference. Anchorage, AK. June 21.

Advancing Payment Reform in the Health Care Safety Net. Webinar presentation at Network for Regional Healthcare Improvement Organization's Monthly Health Do-ers call. May 23.

Facilitators and Barriers to the Adoption of New Technologies: Evidence from the Health Care Sector. Arizona State University School of Criminology and Criminal Justice Colloquium Series. April 29.

Components of Economic Analysis Planning in Public Health. Association of Maternal & Child Health Programs Birth Outcomes Collaborative. Charleston, SC. March 16-17.

2015

Tools for Economic Analysis by Public Health Professionals. Symposium presentation for North Carolina Department of Health. Raleigh, NC. December 16.



- Academic-practice Partnerships for Conducting Economic Analyses. 143<sup>rd</sup> American Public Health Association Annual Meeting. Chicago, IL. November 2.
- Association of Elimination of AHCCCS Dental Benefits with Changes in Dental-Related Emergency Department Visits in Maricopa County from 2006-2012. Poster presentation at 143<sup>rd</sup> American Public Health Association Annual meeting. Chicago, IL. November 2. (Co-author)
- The Great Recession & Fiscal Allocation for Public Health: How Has Our Slice of the Pie Changed? Presentation at 11<sup>th</sup> Annual Public Health Finance Roundtable, pre-conference session for 143<sup>rd</sup> American Public Health Association Annual Meeting. Chicago, IL. November 1.
- Presenter and moderator for pre-conference Return on Investment Analytic Action Learning Collaborative. Association of Maternal & Child Health Programs CityMatCH Maternal and Child Health Epidemiology Conference. Salt Lake City, UT. September 27.
- Conducting Economic Analyses in Public Health Nursing. Presentation to Arizona Nurses Association Public Health Nursing Roundtable. Phoenix, AZ. September 14.
- Evaluating a Community Health Improvement Plan Partnership Using Social Network Analysis. Presentation at National Association of County and City Health Officials Annual Conference. Kansas City, MO. July 8. (Co-presenter)
- Experiences with Clinical Billing at a Local Health Department: Financial Management Needs & Strategies. Poster presentation at 14<sup>th</sup> Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. Minneapolis, MN. June 16.
- Improving Regional and Organizational Readiness for Adoption and Implementation of Electronic Health Information Exchange in Underserved Settings. Poster presentation at 32<sup>nd</sup> AcademyHealth Annual Research Meeting. Minneapolis, MN. June 15.
- Adoption & Use of Informatics by Public Health Departments. Poster presentation at 32<sup>nd</sup> AcademyHealth Annual Research Meeting. Minneapolis, MN. June 14.
- Patterns and Correlates of Public Health Informatics Capacity among Local Health Departments: An Empirical Typology. Presentation at 8<sup>th</sup> Annual PHSSR Keeneland Conference. Lexington, KY. April 22.
- Accounts Receivable: Timing of Clinical Billing Reimbursement for a Local Health Department. Presentation at 8<sup>th</sup> Annual PHSSR Keeneland Conference. Lexington, KY. April 21.
- Social Network Analysis of a Health Department-led Community Health Improvement Partnership. Poster presentation at 8<sup>th</sup> Annual PHSSR Keeneland Conference. Lexington, KY. April 21.
- Reducing Preventable Perinatal Harm to Decrease Malpractice Claims. Presentation at 8<sup>th</sup> Annual PHSSR Keeneland Conference. Lexington, KY. April 21. (Co-author)
- Capacity for Public Health Informatics Among Public Health Departments. Arizona State University Department of Biomedical Informatics Seminar Series. Scottsdale, AZ. March 19.
- Economic Analysis for Public Health Practitioners. Presentation to Association of Maternal & Child Health Programs Life Course Research Network. National webinar. January 15.
- 2014*
- Tax Levy Financing for Public Health: The Moderating Influence of Long-Term Debt. Presentation at 10<sup>th</sup> Annual Public Health Finance Roundtable, pre-conference session for 142<sup>nd</sup> American Public Health Association Annual Meeting. New Orleans, LA. November 16.
- Communicating the Value of MCH Prevention Efforts to Illustrate a Return on Investment. Facilitator, half-day pre-conference training sponsored by Association of Maternal & Child Health Programs. Phoenix, AZ. September 16.
- The Health Economics Workforce at Local Health Departments. Presentation at 2014 CityMatCH Maternal and Child Health Epidemiology Conference. Phoenix, AZ. September 16.
- Cost Analyses & Cost Effectiveness at Public Health Departments. Presentation to Association of Maternal & Child Health Programs Analytic Action Learning Collaborative. National webinar. August 26.
- A National Measure of Local Health Department Tax Levy Financing. Presentation at 13<sup>th</sup> Annual Public Health Systems

- Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. San Diego, CA. June 11.
- The Sustainability of Local Health Department Partnerships to Improve Population Health. Presentation at 13th Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. San Diego, CA. June 10. (Co-author)
- Differences in Urban and Rural Public Health System Influences on Changes in County-Level STD Rates. Presentation at 13th Annual Public Health Systems Research (PHSR) Interest Group Meeting, AcademyHealth Annual Research Meeting. San Diego, CA. June 10. (Co-author)
- Urban versus Rural Use of Electronic Communications between Patients & Ambulatory Providers. Poster presentation at 31<sup>st</sup> AcademyHealth Annual Research Meeting. San Diego, CA. June 8.
- Alignment of Public Health Department Expenditures & County Health Rankings. Presentation to Maricopa County Department of Public Health Director and Disease Control Division. Phoenix, AZ. April 15.
- Measuring the Spread & Impact of Innovations: Research from Health Care Delivery & Public Health Systems. Invited lecture at Arizona State University College of Health Solutions. Phoenix, AZ. March 31.
- 2013*
- Examining Health Information Exchange Participation in Primary Care Practices: Methodological Challenges and Practical Considerations. Presentation to UCLA Community Engagement and Research Program (CERP). Los Angeles, CA. June 20.
- Local Health Department Adoption and Discontinuation of Electronic Medical Records. Podium presentation at 6<sup>th</sup> Annual PHSSR Keeneland Conference. Lexington KY. April 10.
- Patterns of Health IT Use in Ambulatory Care: Recent Trends and Implications. Presentation to UCLA Health Policy & Management Departmental seminar. Los Angeles, CA. January 31.
- 2011*
- Evaluating Local Health Department Spending in Minnesota: Connecting Spending, Processes, and Population Health Metrics. Presentation at 28<sup>th</sup> AcademyHealth Annual Research Meeting. Seattle, WA. June 12.
- Local Health Department Spending in Minnesota. Presentation at 17<sup>th</sup> Annual AHRQ National Research Services Award Conference. Seattle, WA. June 11.
- 2010*
- Best Practices in Laboratory Safety & Hygiene. Presentation to Afghanistan National Blood Bank Managers. Kabul, Afghanistan. July 18.
- Local Health Department Spending in Minnesota. Master's Project Presentation to University of Minnesota School of Public Health Faculty. Minneapolis, MN. May 13.
- Building the Evidence Base on Quality Improvement in Public Health: Program Overview. RWJF Grantee Annual Meeting. New Orleans, LA. March 3.
- 2009*
- Grant Development & Proposal Writing for Community-Based Organizations. Training Seminar for Local Aid Organizations in Uganda. Arua, West Nile, Uganda. July 15.
- Program Management & Financial Management for Community-Based Organizations. Training Seminar for Local Aid Organizations in Uganda. Arua, West Nile, Uganda. July 16 – 17.

**Megan Lorraine Smith**

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**EDUCATION**

- Cornell University** June 2019  
Graduate Certificate, *Change Leadership*  
Leadership & Development of Diverse Teams
- West Virginia University** August 2015  
Ph.D. *Human Development & Family Studies*  
Emphasis: Adolescent Development, Risk & Protective Factors, School Environment, Teacher Preparation
- California State University, Chico** December 2008  
Graduate California Teaching Credential, Department of Education  
Emphasis: Multiple Subjects Teaching K-8 (CLAD)  
Emphasis: Single Subject Teaching, English & Performing Arts K-8 (CLAD)
- University of California, Santa Cruz** June 2006  
Bachelor of Arts, Psychology  
Emphasis: Diverse Populations; Special/At-Risk populations  
Minor: Education

**PROFESSIONAL EXPERIENCE IN HIGHER EDUCATION**

- Associate Professor** 2021-present  
Department of Public Health & Population Sciences  
Boise State University, Boise, ID
- Assistant Professor** 2018- 2021  
Department of Public Health & Population Sciences  
Boise State University, Boise, ID
- Director for Child & Adolescent Health Initiatives** 2016-2018  
Prevention Research Center  
West Virginia University, Morgantown, WV
- Assistant Professor** 2015-2018  
Department of Social and Behavioral Health, School of Public Health  
West Virginia University, Morgantown, WV
- Graduate Research Assistant** 2013-2015  
Program Evaluation and Research Center  
West Virginia University, Morgantown, WV

<b>Graduate Teaching/Research Assistant</b> Benedum Collaborative Teacher Preparation Program West Virginia University, Morgantown, WV	2012-2015
<b>Adjunct Course Instructor</b> College of Education and Human Services West Virginia University, Morgantown, WV	2012-2015
<b>Upward Bound Instructor</b> Feather River Community College, Quincy, CA	2010-2012
<b>Chancellor's Undergraduate Intern</b> University of California, Santa Cruz, CA	2004-2006
<b>Program Coordinator, International Programs</b> College Nine University of California, Santa Cruz, CA	2003-2004

#### UNIVERSITY COURSES TAUGHT, CONTRIBUTED TO, AND/OR DEVELOPED

1. MHS 522 Organization in Systems Change (Fall 2021-)
2. MHS 510 Enhancing Community Engagement and Advocacy (Fall 2020-)
3. MHS 506 Applied Statistics in Public Health, BSU (Spring 2020, Fall 2020)
4. MHS 597 Adolescent & Emerging Adulthood Health, BSU (Spring 2020, 2021, 2022)
5. HLTH 497 Special Topics in Adolescent Health, BSU (Spring 2020)
6. HLTH 382 Research Methods for Health Sciences, BSU (Fall 2019, Spring 2020, 2021)
7. PUBH 470 Collaborating for Change, BSU (Summer 2019, Fall 2019, Summer 2020, Spring 2021)
8. PUBH 310 Evidence-Based Public Health, BSU (Fall 2018, Spring 2019)
9. PUBH 616 Introduction to Public Health Interventions, WVU (Fall 2018)
10. PUBH 693 Adolescent Health Promotion, WVU (Spring 2017)
11. PUBH 454 Research Methods for Public Health, WVU (Fall 2017-Spring 2018)
12. SHED 602 Emerging Research in Secondary School Health, WVU (Online) (Fall 2016-Fall 2019)
13. SHED 640 Program Evaluation & Assessment in School Health (Online), WVU (Spring 2016- Fall 2018)
14. CHPR 400 Health Student Teaching Seminar, WVU (Fall 2015-SP 2017)
15. CHPR 301 Health for Elementary Teachers, WVU (Fall 2015- SP 2017)
16. EDP 613 Statistics 1 (Online), WVU (Spring 2015, Summer 2015, 2014)
17. CDFS 412 Adolescent Development, WVU (Fall 2014)
18. EDP 614 Statistics 2 (Online), WVU (Fall 2014)
19. CDFS 212 Early Childhood Development (Online), WVU (Summer 2013)
20. EDUC 600 Teacher as Researcher- Inquiry as Stance, WVU (Fall 2012-Fall 2014)
21. EDUC 411 Teacher as Researcher- Inquiry as Stance, WVU (2012-2014)
22. EDUC 410 Teacher as Researcher- Inquiry as Stance, WVU (2012-2014)
23. EDUC 312 Teacher as Researcher- Inquiry as Stance, WVU (2012-2014)
24. EDUC 310 Teacher as Researcher- Inquiry as Stance, WVU (2012-2014)
25. International Conflict Resolution & Diplomacy, UCSC (2004-2006)
26. International & Global perspectives, UCSC (2003-2005)

#### PROFESSIONAL EXPERIENCE IN K-12 EDUCATION

<b>Teacher Educator &amp; Placement Coordinator</b> West Virginia University, Morgantown, West Virginia	<b>2012-2018</b>
<b>Teacher, 7<sup>th</sup>-12<sup>th</sup> Grade Science, Math and Drama</b> Quincy Junior Senior High School, Quincy, CA	<b>2010-2012</b>
<b>Director/Drama Coach 7<sup>th</sup>-12<sup>th</sup> Grade</b> Quincy Junior Senior High School, Quincy, CA	<b>2010-2012</b>
<b>Teacher, English 7, 8 and English Language Development</b> Marsh Junior High School, Chico, CA	<b>2009-2010</b>
<b>Student and Substitute Teacher, English, Psychology, and Drama</b> Pleasant Valley High School, Chico, CA	<b>2008-2009</b>
<b>Classroom Connection Tutor, Title 1 Reading Recovery</b> Live Oak Elementary School, Santa Cruz, CA	<b>2005</b>
<b>Barrios Unidos Field Experience</b> Santa Cruz, CA	<b>2003-2004</b>

#### HONORS AND AWARDS

Highest Scoring Abstract, APHA Women's Caucus, 2021  
 School of Public Health Faculty Teaching Award, Nominated, 2018  
 Health Science Center Teaching Scholar 2016-2018  
 Best Paper of 2017 International Journal of Recreation, 2017  
 College and Department Research Award, CEHS, 2014, 2015  
 Graduate Researcher Award, CEHS Research Forum, 2014  
 Woodrow & Virginia Bonds Endowed Scholarship, 2013-2015  
 Graduate Researcher Award, CEHS Research Forum, 2013  
 Honoree, invited speaker for CSU Chico credential graduation ceremony, 2008  
 Honors in the major; Psychology-UCSC, 2006  
 College Service Award- College Nine, UCSC 2006  
 International and Global Perspectives Leadership Recognition- College Nine, UCSC 2006  
 Language and Culture Distinction- College Nine, UCSC 2006  
 Chancellor's Undergraduate Internship, International Studies- UCSC 2005 [full scholarship]

#### PEER-REVIEWED MANUSCRIPTS ACCEPTED FOR PUBLICATION

*\*denotes co-author was a student*

1. Kristjansson AL, Santilli AM, Mills R, Layman HM, **Smith ML**, Mann MJ, MacKillop J, James JE, Lilly CL, Kogan SM (2022). Risk and Resilience Pathways, Community Adversity, Decision-making, and Alcohol Use Among Appalachian Adolescents: Protocol for the Longitudinal Young Mountaineer Health Study Cohort JMIR Res Protoc 2022;11(8):e40451 doi: [10.2196/40451](https://doi.org/10.2196/40451)

2. Kidd KM, Sequeira GM, Mann MJ, **Smith ML**, Benton BR, Kristjansson AL. The Prevalence of Gender Diverse Youth in a Rural Appalachian Region, 2022. *JAMA Pediatrics. In Press.*
3. Mills, R.\* , Mann, M.J., **Smith, M.L.** et al. (2021). Parental support and monitoring as associated with adolescent alcohol and tobacco use by gender and age. *BMC Public Health* 21, 2000 (2021). <https://doi.org/10.1186/s12889-021-12119-3>
4. Smith, B. T.\* , Brumage, M., Zullig, K., Claydon, E., **Smith, M.L.**, & Kristjansson, A. (2021). Adverse childhood experiences among females in substance use treatment and their children: A pilot study, *Preventive Medicine Reports*, Volume 24. <https://doi.org/10.1016/j.pmedr.2021.101571>.
5. Mann, M. J., **Smith, M. L.**, Kristjansson, A. L., Daily, S., McDowell, S., & Traywick, P. (2021). Our Children Are Not "Behind" Due to the COVID-19 Pandemic, but Our Institutional Response Might Be. *The Journal of school health*, 91(6), 447–450. <https://doi.org/10.1111/josh.13016>
6. **Smith, M.L.**, Mann, M. J., & Kristjansson, A. K. (2020). School Climate, Developmental Support, and Adolescent Identity Formation. *Journal of Behavioral and Social Sciences*, 7, 255-268.
7. Daily, S. M.\* , Mann, M. J., Lilly, C. L., Bias, T. K., **Smith, M. L.**, & Kristjansson, A. L. (2020). School climate as a universal intervention to prevent substance use initiation in early adolescence: a longitudinal study. *Health Education & Behavior*, 47(3), 402-411.
8. Daily, S.M.\* , Mann, M.J., Lilly, C.L., Davidov, D.M, **Smith, M.L.**, Kristjansson, A.L. (2020). Using School Climate to Improve Attendance and Grades: Understanding the Importance of School Satisfaction Among Middle and High School Students. *Journal of School Health*.
9. Daily, S.M.\* , Mann, M. J., Lilly, C.L., Dyer, A.M.\* , **Smith, M. L.**, Kristjansson, A.L. (2020). School Climate as an Intervention to Reduce Academic Failure and Educate the Whole Child: A Longitudinal Study. *Journal of School Health*.
10. Daily, SM.\* , Zullig, K., Kristjansson AL., **Smith, ML.**, Mann, MJ. (2019). Preliminary validation of the School Climate Measure in a sample of early adolescent public-school children. *Assessment for Effective Intervention*, 1-10.
11. Daily, S. M.\* , Kristjansson, A. L., Mann, M. J., Zullig, K. & **Smith, M.L.**, (2019). School Climate and Academic Achievement in Middle and High School Students. *Journal of School Health*, 89(3), 173-180.
12. Kristjansson, A.L., Kogan, S. M., Mann, M.J., **Smith, M.L.**, Juliano, L. Lilly, C., James, J. (2018). Does early exposure to caffeine promote smoking and alcohol use behavior? A prospective analysis of middle school students. *Addiction*, 113, 1706-1713.
13. Mann, M.J., Kristjansson, A.L., **Smith, M.L.**, Daily, S.M\* , Thomas, S.\* , & Murray, S. (2018). From Tactics to Strategy: Creating and sustaining social conditions that demand and deliver effective school health programs. *Journal of School Health*, 88(5), 333-336.
14. Kristjansson, A.L., Mann, M.J., **Smith, M.L.**, & Sigfusdottir, I.D. (2018). Social Profile of Middle School-Aged Adolescents who use Electronic Cigarettes: Implications for Primary Prevention. Accepted for publication in *Prevention Science*, 19, 805-812.

15. **Smith, M.L.**, Strahan, D., Bouton, B., Patterson, B.\* & McGaughey, N. (2018). Developmental aspects at the Middle Level. In S. B. Mertens, M. M. Caskey, P. Bishop, N. Flowers, D. Strahan, D., G. Andrews, & L. Daniel (Eds.), *The Handbook of Resources volume. The Middle Level Education Research SIG Research Agenda and Literature Reviews*.
16. Leppma, M., Long, D., **Smith, M.L.**, & Lassiter, C.\* (2018). Detecting Symptom Exaggeration in College Students Seeking ADHD Treatment: Performance Validity Assessment Using the NV-MSVT and IVA-Plus, *Applied Neuropsychology: Adult*, 25(3), 210-218.
17. Harvey, S., Gil-Arias, A., **Smith, M.L.**, & Smith, L.R. (2017). Middle and Elementary School Students' Changes in Self-Determined Motivation in a Basketball Unit Taught using the Tactical Games Model. *Journal of Human Kinetics*, 59, 39-53.
18. Kristjansson, A.L., Mann, M.J., & **Smith, M.L.** (2017). Prevalence of substance use among middle school-aged e-cigarette users compared with cigarette smokers, non-users and dual users: Implications for primary prevention. *Substance Abuse*.
19. Swan-Dagen, A., Moorewood, A., & **Smith, M.L.** (2017). Teacher Leader Model Standards and the Functions Assumed by Nationally Board Certified Teachers. *The Educational Forum*.
20. Dyer, A.\*, Kristjansson, A. L., Mann, M.J., Allegrante, J., & **Smith, M.L.** (2017). Sport Participation and Academic Achievement in High School Students: A Longitudinal Study. *American Journal of Health Behavior*.
21. Harvey, S., **Smith, M.L.**, Robertson, D.\*, Song, Y.\*, Brown, R., & Smith, L. (2016). Gender and school-level differences in students' moderate and vigorous physical activity levels when taught basketball through the Tactical Games Model. *Journal of Teaching in Physical Education*, 35 (4), 349-357.
22. Mann, M.J., **Smith, M.L.**, Kristjansson, A.L. & Haley, P. (2016). REAL Girls at Chico Junior High: Enhancing Relevance in Clinical Preparation Experiences. In P.B. Howell, J. Carpenter & J. Jones, *Clinical Preparation at the Middle Level: Practices and Possibilities*, Charlotte, NC: IAP.
23. Mann, M.J., Kristjansson, A., **Smith, M. L.**, Sigfusdottir, I. D. (2016). The Influence of Negative Life Events on Problem Behavior and Grades in Early Adolescence: An Examination of Academic Risk in Middle School. *Research in Middle Level Education*, 39 (10), 1-13.
24. **Smith, M. L.**, Strahan, D., Jones, J., Akos, P., Bouton, B., Cook, C., & McGaughey, N. (2016). Developmental aspects. In S. B. Mertens, M. M. Caskey, P. Bishop, N. Flowers, D. Strahan, D., G. Andrews, & L. Daniel (Eds.), *The MLER SIG research agenda* (pp. 1-3). Retrieved from <http://mlersig.net/mler-sig-research-agenda-project/>.
25. Arbogast, D.\* & **Smith, M.L.** (2016). Investigating Differences in Generational Travel Preferences: The Case of the New River Gorge, West Virginia. *Journal of Tourism and Leisure Studies*, 1(4), 19-29. \*\* article won annual journal award
26. **Smith, M. L.**, Mann, M. J., Georgieva, Z., Curtis, R., & Schimmel, C. (September, 2016). What Counts When it Comes to Predicting School Enjoyment and Aspiration in Middle School? *Research in Middle Level Education*, 39(8), 1-13.

27. Song, Y.\* , Harvey, S., & **Smith, M. L.** (2016). Physical Activity and Lesson Context Relationships in Tactical Games Lessons. *Research Quarterly for Exercise and Sport*, 87(S2), A75.
28. **Smith, M. L.** (2016). Global Identity and Ego Identity Formation in Relation to Global Sources of Influence. *The International Journal of Interdisciplinary Global Studies*, 11(2), 15-29.
29. Mann, M.J., **Smith, M.L.**, & Kristjansson, A.L. (2016). Energy drink consumption and substance use risk in middle school students. *Preventative Medicine Reports*, 3, 279-282.
30. Mann, M.J., Kristjansson, AL., Sigfusdottir, ID., **Smith, M.** (2015). The Role of Community, Parent, Peer, and School Factors in Adolescent Bullying Behavior and Victimization: Implications for School-based Intervention. *Journal of School Health*, 85, 477-486.
31. Mann, M.J., **Smith, M.L.**, Kristjansson, A.L. (2015). Improving Academic Self-Efficacy, School Connectedness, and Identity in Struggling Middle School Girls: A Quasi-Experimental Study of the REAL Girls Program. *Health Education & Behavior*, 42(1), 117-126.
32. Curtis, R., **Smith, M. L.**, Mathew, S., Georgieva, Z., Moore, L., Chester, A., & McKendall, S. (2015). Rural student voices to improve educational attainment oriented programs. *Journal of Behavioral and Social Sciences*, 1, 66-73.
33. Mann, M.J., Kristjansson, A.L., Sigfusdottir, I.D., **Smith, M.L.** (2014). The Impact of Negative Life Events on Young Adolescents: Comparing the Relative Vulnerability of Middle Level, High School, and College-Age Students. *Research in Middle Level Education Online*, 38(2), 1-13.
34. Mann, M.J. & **Smith, M.L.** (2013). Promoting Rigor-in-Practice through School Self-Evaluation: A Middle School's Experience with Model Development, Implementation, and Evaluation Using the *Model of Student Empowerment for Alternative Middle Schools*. *Research in Middle Level Education*.

#### Manuscripts Under Review

1. Woodard, T.\* , Smith, M., Mann, M., & Kristjansson, A. (under review). The importance of extracurricular and leisure time for substance prevention in adolescents. Submitted to *Children and Youth Services Review*.
2. Morris, T.O., Mann, M.J. and **Smith, M.L.** (under review). Using storytelling to effectively teach STEM content to non-STEM majors. Submitted to *Teaching in Higher Education*.

#### Manuscripts In-Progress

1. Mujak, I.\* & Smith, M.L. (in progress). Mental Health in Minority Youth: A Literature Review. *Journal of School Health*.
2. **Smith, M.L.**, Hill, A., Bryan, J., & Allan, H.\* (in progress). Factors Predicting Longitudinal Changes in Suicidal Ideation in Adolescent Women.
3. **Smith, M.L.**, Kettler, J., Glodt, A\* . (in progress). Innovative Approaches to Health Equity: Women Running for Office. *Health Promotion Practice*.



4. **Smith, M.L.**, Alghamdi, A.\* , Mann, M.J., & Kristjansson, A.L. (in-progress). Peer Influence on Academic Achievement as Moderated by School Climate Factors. *Journal of School Health*.
5. Mann, M.J., Kristjansson, A.L. & **Smith, M.L.** (in-progress). The Community Engagement Index: Measuring the Impact of Civic Engagement, Service Learning, and Social Health Interventions in School-Age Adolescents. *Health Education and Behavior*.

## PEER-REVIEWED PROFESSIONAL PRESENTATIONS

\*denotes co-author was a student

1. **Smith, M.L.**, Bryant, J., Hill, A., Allan, H, Mann, M. & Kristjansson, A.\* (October 2021) Unpacking suicidal ideation and completion in adolescent girls. American Public Health Association.
2. Ambrose, B.\* **Smith, M.L.**, Lasich, N. & Schafer, E. (October 2021). Relationship Between Maternal Experience of IPV and Breastfeeding Outcomes.
3. Woodward, T., Mann, M.J. & **Smith, M.L** (2021). Comparing the Relative Influence of Family, Peer, School and Leisure Factors on Adolescent Substance Abuse. Poster presentation at the American School Health Association national conference
4. **Smith, M.L.**, Allan, H. & Bryant, J.\* (October 2020) Factors Predicting longitudinal changes in suicidal ideation in adolescent women. American Public Health Association.
5. **Smith, M.L.** & Mann, M. J. (January 2020) Lessons from a statewide effort to increase mental health in schools: SAMSHA's Project AWARE. Health Advocates.
1. **Smith, M.L.** & Mann, M. J. (January 2020) Policy as Prevention: A Grassroots Advocacy Approach to Promoting Health for LGBTQ Youth. Health Advocates.
2. Mann, M.J., Kristjansson, A.L, **Smith, M.L** & Daily, S.\* (2019). Using the Community Engagement and Engaging Differences Scales: Developing Student Capacity to Build Healthy and Diverse Communities. Presented at the American School Health Association national conference.
6. **Smith, M.L.** (November 2019) Innovative Approaches to Health Equity: Women in Office. American Public Health Association.
7. Smith, B.\* & **Smith, M. L.** (May 2019). Negative Life Events and School Connectedness on Positive Identity Formation. International Society for Research on Identity.
8. Johnson, J.\* & **Smith, M. L.** (May 2019). Racial Identity and School Connectedness. International Society for Research on Identity.
9. **Smith, M.L.** (November 2018) Fighting for Health Equity and Women's Rights: Women Running for Office in 2018. American Public Health Association.
10. **Smith, M.L.**, Risser, L.\* , McKenzie, N.\* , & Verna, N\*. (February 2018) Promoting Resilience in Appalachian Youth. American Association of Behavioral and Social Sciences.

11. Jones, D., Jones, D., & **Smith, M.L.** (November 2017). Improving Academic Self-Efficacy, School Connectedness, and Identity in Truant Pittsburgh Students: A Preliminary Study of the All About Me Program. American Public Health Association.
12. Daily, S. M.\*, Kristjansson, A. L., Mann, M. J., Zullig, K. & **Smith, M.L.**, (November 2017). School Climate and Indicators of Emotional Distress. American Public Health Association.
13. **Smith, M. L.**, Mann, M. J., Kristjansson, A. L. (October 2017). School Climate and Mental Health in Middle and High School Students: Evidence from Project AWARE in West Virginia. Conference on Advancing Mental Health.
14. **Smith, M. L.**, Daily, S. M.\*, Thomas, S.\*, Kristjansson, A. L. & Mann, M. J. (October 2017). School Climate: Promoting the Positive Dimensions of Students' Emotional Well-Being. American School Health Association.
15. Daily, S. M.\*, Thomas, S.\*, **Smith, M.L.**, Kristjansson, A. L. & Mann, M. J. (October 2017). School Climate: A Whole Child Intervention that Reduces Academic Risk. American School Health Association.
16. Thomas, S.\*, Daily, S. M.\*, Kristjansson, A. L., **Smith, M.L.**, & Mann, M. J. (October 2017). School Climate and Indicators of Emotional Distress. American School Health Association.
17. Smith, M.L., Mann, M.J., & Kristjansson, A.L. (May 2017). "Identity and Health in Schools: An Interactive Session." International Society for Research on Identity.
18. Balducci, K.\*, Davison, K.\*, **Smith, M.L.**, Mann, M. J., & Kristjansson, A.L. (May 2017). Negative Life events, Identity, and Life Satisfaction in Adolescents. International Society for Research on Identity.
19. Mann, M.J., **Smith, M. L.** & Kristjansson, A.L. (January 2017). School climate, student developmental needs, and risk of academic failure: A whole child model. International Conference on the Health Risks of Youth annual conference.
20. Mann, M.J., Kristjansson, A.L. & **Smith, M. L.** (January 2017). Community engagement and engaging differences: Understanding and predicting young people's capacity to build healthy communities as adolescents and adults. International Conference on the Health Risks of Youth annual conference.
21. Kristjansson, A.L., Mann, M.J., & **Smith, M.L.** (October 2016). Middle school climate, developmental need satisfaction, and primary prevention: A whole child model for reducing early adolescent substance abuse and sexual risk taking. American Public Health Association.
22. Mann, M.J., **Smith, M. L.**, & Kristjansson, A.L. (October 2016). Creating School Environments Specifically for Middle School Students. Association for Middle Level Education.
23. **Smith, M. L.**, Mann, M.J., & Kristjansson, A.L. Invited. (October 2016). New Directions in Middle Level Education (a). Association for Middle Level Education.
24. Mann, M.J., **Smith. M.L.**, & Kristjansson, A.L. Invited. (October 2016). New Directions in Middle Level Education (b). Association for Middle Level Education.

25. **Smith, M. L.**, Mann, M.J., & Kristjansson, A.L. (October 2016). Supporting Identity Development in Middle Schools to Maximize Positive Outcomes. Association for Middle Level Education.
26. **Smith, M. L.** Invited. (October 2016). The Middle Level Education Research SIG Presents a New Agenda for Middle Level Education Research. Association for Middle Level Education.
27. **Smith, M.L.**, Markstrom, C.A., Kristjansson, A.L. & Mann, M.J. (April 2016). School Climate, Early Adolescent Development, and Identity: Associations with Adjustment Outcomes. Society for Research on Adolescence.
28. **Smith, M.L.**, & Mann, M.J. (April 2016). School Climate, Developmental Needs Satisfaction, and Positive Identity Formation. International Society for Research on Identity.
29. **Smith, M.L.** & Moilanen, K. (April 2016). Antecedents to Academic Self-esteem in Adolescence. American Educational Research Association.
30. Mann, M.J., **Smith, M.L.**, Kristjansson, A.L., & Sigfusdottir, I.D. (October 2015). Negative Life Events and Early Adolescent Depression, Anger, and Anxiety: Comparing the Relative Vulnerability of Early, Middle, and Late Adolescents. Invited talk.
31. Mann, M.J. & **Smith, M.L.** (October 2015). Promoting Rigor-in-Practice through School Self-Evaluation: A Middle School's Experience with Model Development, Implementation, and Evaluation. Invited talk to discuss the previously published article of the same name at the Association for Middle Level Educators National Conference.
32. **Smith, M.L.**, Kristjansson, A. L., & Mann, M.J. (October 2015). How School Climate and Adolescent Development Impact Health Behavior: A Conceptual Model. American School Health Association.
33. **Smith, M.L.** (May 2015). Predicting Risk Behavior in Early Adolescence using the Dimensions of Identity Development Scale. Society for Research on Identity Formation.
34. **Smith, M.L.** & Markstrom, C. A. (May 2015). Supporting Identity Development in Schools. Society for Research on Identity Formation.
35. **Smith, M.L.**, Georgieva, Z., Curtis, R., & Schimmel, C. (April 2015). Student Enjoyment and Aspiration in Middle School. Will be presented at the American Education Research Association conference.
36. Mann, M.J., Kristjansson, A.L. & **Smith, M.L.** (November 2014). The Community Engagement Scale. Presented at the American Public Health Association's Annual Conference
37. Mann, M.J. & **Smith, M.L.** (November 2014). The Model of Empowered Student Behavior for Alternative Middle Schools. Presented at the Association for Middle Level Educators' National Conference
38. Mann, M.J. & **Smith, M.L.** (November 2014). Supporting Middle School Students Grieving the Loss of a Parent. Presented at the Association for Middle Level Educators' National Conference
39. Mann, M.J. & **Smith, M.L.** (November 2014). Professional Development Planning for Pre-service and Early Career Teachers. Presented at the Association for Middle Level Educators' National Conference

40. **Smith, M.L.** & Mann, M.J. (November 2014). Developmentally Responsive Middle School Educators: Application to Practice. Presented at the Association for Middle Level Educators' National Conference.
41. Mann, M.J., Kristjansson, A.L. & **Smith, M. L.** (March, 2014). Negative life events and early adolescent emotional health: Examining the relative vulnerabilities of younger and older adolescents. Society for Adolescent Research Biennial Conference.
42. **Smith, M.L.** & Mann, M. J. (March 2014). Strong, Capable, and Confident: Evaluating Developmental Intervention Strategies Designed to Promote Resilient Identity in Vulnerable Early Adolescent Girls. Society for Research on Identity Formation.
43. Curtis, R., Georgieva, Z., **Smith, M.**, Mathew, S., Moore, L. & Saenz, T. (February 2014). Collaborative logic modeling to plan, evaluate and foster collaborations. American Association of Behavioral and Social Sciences.
44. Mann, M.J. & **Smith, M.L.** (October 2013). What Works with Struggling Middle School Girls: 12 Elements of Effective Intervention Programs. American School Health Association National Conference.
45. **Smith, M.** & Markstrom, C. A. (May 2013). Global Identity and Ego Identity Formation in Relation to Global Sources of Influence. Society for Research on Identity Formation.
46. Mann, M.J., Kristjansson, A. & **Smith, M.** (April 2013). Improving Struggling Middle School Girls' Levels of School Connectedness, Academic Self-Efficacy, and Identity: A Mixed Methods Quasi-Experimental Study of the REAL Girls Program. Society for Public Health Education.
47. **Smith, M.** & Markstrom, C. A. (April 2013). Global Identity and Ego Identity Formation in Relation to Global Sources of Influence; A Preliminary Study. CEHS Graduate Student Research Forum.

#### OTHER INVITED ACADEMIC AND PROFESSIONAL PRESENTATIONS

48. **Smith, M. L.** & Mann. M.J. (2019) Emphasizing Prevention in Public Health: An Example of Effective Nation-Level Systems Change. Invited oral presentation at the Boise State University Mandela-Washington Fellows Program.
49. **Smith, M. L.** (2019) The Icelandic Prevention Model: Key Principles, Processes, and Steps to Implementation. Invited oral presentation to Youth Empowerment Services, Cascade, Idaho.

#### EXTERNALLY FUNDED PROJECTS

1. 2022, PI, Addressing Mental Health Disparities from COVID-19, IDHW -\$450,000
2. 2019-2024, Co-PI, Adapting the Icelandic Model of Prevention to the Appalachian Context, Centers for Disease Control, U48 - \$2.0m.
3. 2019-2024, Co-PI, Risk and Resilience Pathways Linking Community Adversity, Decision-making, and Alcohol Misuse: A prospective study of Appalachian adolescents, National Institute on Drug Abuse, National Institutes of Health, R01 - \$2.5m.
4. 2018-2023, Co-PI, West Virginia Statewide Family-School Partnership Centers, US Department of Education, Office of Innovation and Improvement - \$600,000.00

5. 2018-2019, PI, Evaluating the Personal Responsibility Education Program. Department of Health and Human Resources. \$50,000
6. 2018-2020, PI, Promoting Resilience in Rural Youth. Appalachian Translational Research Network, \$50,000
7. 2017-2018, PI, Evaluating the Personal Responsibility Education Program. Department of Health and Human Resources. \$50,000
8. 2016-2018, Co-I, Research in Youth Health Initiative. WV Prevention Research Center. CDC. (15% FTE)
9. 2016-2017, PI, Evaluating the RAZE program. Department of Tobacco Prevention. \$50,000
10. 2016-2018, Co-I, All About Me Program in Truant and At-Risk Youth. Youth Empowerment Services. (5% FTE)
11. 2014-2019, Co-I, Evaluating the State-Level Now Is the Time: Project Aware, SAMSHA and West Virginia Department of Education – \$435,435.00
12. 2014-2019, Co-I, Evaluating the County-Level Now Is the Time: Project Aware, SAMSHA and West Virginia Department of Education - \$149,988.00
13. 2014-2017, Co-I, Increasing Father Participation in Early Childhood Parenting Programs, West Virginia Department of Health and Human Resources, Office of Maternal and Child Health - \$350,00.00
14. 2014-2016, Co-I, Evaluating West Virginia's Women on Wellness Program, National Center for Excellence in Women's Health -\$67,000
15. 2014-2016, Co-I, Evaluating the West Virginia Clinical and Translational Sciences Institute.

#### **Additional Grant Work and Proposals Contributed to**

16. "Integrated Community Engagement Collaborative" (2014-2016). Sisters Health Foundation. (Total Awarded \$60,000).
17. "Education Elevators" (2014-2015), Education Alliance- Business and Community for Public Schools, Inc. (Total Awarded \$6,000)
18. "Teachers Engaged in STEM Literacy: Project TESAL", West Virginia Department of Education. (Total Awarded \$50,000)
19. "Americorps on the Frontline for Education" (2012-2015). Education Alliance- Business and Community for Public Schools, Inc. (Total Awarded \$50,000)
20. "Preschool science evaluation: Integrating health and biology in a science curriculum for Latino preschoolers" (2013-2014). Sub-award from University of California, Santa Barbara on National Institutes of Health Award No. R25OD010537-02. (Total Awarded \$10,000)

#### **Submitted, but Not Funded, Grants**

1. **Smith, M.L.** (PI) & Giacumo, L. (Co-PI). Submitted Spring 2019. Interdisciplinary Research Leaders. Robert Wood Johnson Foundation. (\$350,000)
2. Kristjansson, A. L. (PI), Mann, M.J. (Co-I), & **Smith, M.L. (Co-I)**. Submitted October, 2015. Adolescent Caffeine Use and Substance Use. R21 NIH-NIDA. (15% fte).
3. "Benedum Collaborative impact on student learning and achievement". Benedum Foundation. (2013). (\$129,181).

#### **PROFESSIONAL AND ACADEMIC ASSOCIATION MEMBERSHIPS**

- American Public Health Association
- American School Health Association
- Society for Public Health Education
- American Educational Research Association
- Association for Middle Level Educators
- Society for Research on Adolescence

- International Society for Research on Identity

### Additional Student Mentoring

#### Graduate Student Committees

##### **Master's Level Thesis Committees at BSU:**

Chair, William Cooney (2020-2022)

Chair, Josie Bryan (2020-2022)

Member, Brooke Ambrose (2020-2021)

Member, Tara Woodward (2020-2021)

Chair, Tara Jones (2018-2020)

Chair, Tara Fouts (2018-2020)

##### **Dissertation Committees:**

Jasmine Johnson, Translational Public Health, Virginia Tech, Ph.D. (2020-)

Douglas Arbogast, Recreation & Community Development, West Virginia University, Ph.D. (2016-2017)

Matthew Anderson, Human Development and Family Studies, West Virginia University, Ph.D. (2016-2017)

Atiyah Algamhdi, Curriculum and Instruction, West Virginia University, (2015-2018)

Mark Morgan, Curriculum and Instruction, West Virginia University, Ph.D. (2015-2017)

Toni Morris, Curriculum and Instruction, West Virginia University, Ed.D. (2015)

### SERVICE

#### Students Mentored

##### **Undergraduate Research Advisees:**

*For the following students, <sup>a</sup>: international, <sup>b</sup>: national, <sup>c</sup>: University/Regional presentations as a result of working on an original research project with me.*

Brittany Smith- WVU, School of Public Health (2017-2020)<sup>a,b,c</sup>

Madisyn Parker- Boise State University (2019)<sup>c</sup>

Harrison Cleveland- Boise State University (2019)<sup>c</sup>

Sidney Carleson- Boise State University (2019)<sup>c</sup>

Justin Hague- Boise State University (2019)<sup>c</sup>

Alex Firkins- Boise State University (2019)<sup>c</sup>

Racquel McGuire- Boise State University (2019)<sup>a,c</sup>

Arnica Phillips- Boise State University (2019)<sup>a,c</sup>

Jasmine Johnson- WVU, School of Public Health (2017-2019)<sup>b,c</sup>

Sam Gercek- WVU, School of Public Health (2017-2018)<sup>c</sup>

Augusto Baron-Cruz- WVU, School of Public Health (2017-2018)<sup>a,c</sup>

Katarina Preamble- WVU, School of Public Health (2017-2018)<sup>c</sup>

Kelsey Jarrett- WVU, School of Public Health (2017-2018)<sup>c</sup>

Lauren Risser- WVU, School of Public Health (2014-2015)<sup>b,c</sup>

Natasha McKenzie- WVU, School of Public Health (2014-2015)<sup>b,c</sup>

Nicole Verna- WVU, School of Public Health Health (2014-2015)<sup>b,c</sup>

Kenna Balducci- WVU, School of Public Health (2016-2017)<sup>a,b,c</sup>

Karla Davidson- WVU, School of Public Health (2016-2017)<sup>a,b,c</sup>

Lisa-Marie Barone, B.A. Child Development and Family Studies (2014-2015)<sup>c</sup>

Lindsey Fisher, B.A. Child Development and Family Studies (2014-2015) °  
 Caitlin Spriggs, B.A. Child Development and Family Studies (2014-2015) °  
 Lauren Strauss, B.A. Child Development and Family Studies (2014-2015) °  
 Amy Young, B.A. Psychology (2014-2015) °

**Master's Level Action Research Projects Supervised**

Maria Cerilli, *Strategies for Mathematical Reasoning* (2014-2015)  
 Carrie Dalton, *Online Journal Writing* (2014-2015)  
 Meredith Dorsey, *The Impact of Art Creation and Exploration on Student Writing*. (2014-2015)  
 Megan Long, *Small Group Game Stations and Their Impact on Student Learning in Math* (2014-2015)  
 Ellie McCoy, *The Impact of Geography Lessons in History Class* (2014-2015)  
 Brittany Reilly, *Authentic Economics in Second Grade Math Class* (2014-2015)  
 Katherine Schaer, *How Parent Involvement Outside the Classroom Affects Achievement* (2014-2015)  
 Jennifer Sirockman, *Students' Attitudes towards Science and Their Textbooks* (2014-2015)  
 Tara Tyler, *Learning in an Electronic Environment* (2014-2015)

**Graduate Student Research Advisees:**

Alyssa Romero (2022-present)  
 Kaydin Griffin (2022-present)  
 Irma Mujak (2021-present)  
 Kenzie Campbell (2021-present)  
 Kyle Peterson (2021-present)  
 Heather Allan (2019-21)  
 Ashtin Glodt (2019-21)  
 Lauren Risser, Public Health, MS (2017-2019)  
 Megan Fountain, Pharmacy, Ph.D. (2017-2018)

**Public Health Advocacy Work**

Member, Idaho Suicide Prevention Program (2020-2022)  
 Founding Member, Ready Idaho Coalition (2019-present)  
 Advocacy Committee, Co-Chair, Society of Public Health Educators (2018-present)  
 Advocacy Program Committee, Society of Public Health Educators (2018-present)  
 State Lead, Save the Children Action Network (2017-present)  
 Board of Directors, Mountaineers for Progress (2016-2019)  
 Board of Directors, Planned Parenthood (2017-2018)

**Service to the University, College, and Profession**

Associate Editor, *Journal of Applied Developmental Psychology*, (2021-present)  
 Student Affairs, Chair, Department of Public Health and Population Science (2020-present)  
 Dialogue Facilitator, Boise State University (2019-present)  
 Women's Caucus, Executive Board, American Public Health Association (2018-present)  
 Diversity & Inclusion Committee, Community & Environmental Health, BSU (2018-2020)  
 Elected Officer, Publications, International Society for Identity Research (2016-2020)  
 Curriculum Committee, SPH, (2016-2018)  
 Faculty Council, SPH (2016-2018)  
 Team lead, Research Agenda Committee for American Middle Level Educators (2015-2017)  
 Consultant, Mon Arts Center Theater programs to promote youth development (2015-2016)  
 College of Education and Human Services Faculty Search Committee (2015)

Graduate Student Advisory Committee (2014-2015)  
Student member on the Secondary Data Analysis committee (2013-2015)  
Accreditation work for CAEP and NCATE- Data Analysis and Report Prep (2012-2015)  
Teaching Portfolio Review for Benedum Collaborative, West Virginia University (2012-2015)  
Health, Science & Technology Academy Summer Camp Educator (2014)  
Research Institute- Training Teachers in Best Practices- Facilitator, WVU (2012-2014)  
Liaison for the Benedum Collaborative Teacher Preparation Program (2012-2013)

**Reviewed Publications and Abstracts for the following publications/organizations**

American Public Health Association, Preventative Medicine, Journal of Adolescence, American Educational Research Association, American School Health Association, Self & Identity, Emerging Adulthood, Common Ground Publishers

**References**

- Will Hughes, Ph.D.  
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- Lillian Smith, Ph.D.  
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Boise State University  
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- Pete Giacobbi Jr., Ph.D.  
Deputy Director, WVU Prevention Research Center  
Associate Professor, Department of Social Behavioral Health Sciences  
School of Public Health  
West Virginia University  
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West Virginia University  
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- Amy Root, Ph.D.  
Program Coordinator- Child Development & Family Studies  
Associate Professor, Department of Learning Sciences & Human Development  
College of Education and Human Services  
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- Reagan Curtis, Ph.D.  
Director of Program Evaluation & Research Center  
WVCTSI Director of Tracking, Evaluation, and Quality Improvement  
Professor of Educational Psychology  
Department of Learning Sciences & Human Development  
College of Education & Human Services  
West Virginia University  
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**Michael J. Mann, PhD, FASHA**

Associate Professor, Interim Divisional Dean, and Associate Dean for Academic, Student and Faculty Affairs  
*School of Public and Population Health, College of Health Sciences, Boise State University*

**Contact Information:**

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**Education****Doctor of Philosophy, 2007**

Department of Health and Human Behavior  
University of Florida, Gainesville, Florida  
Major: Health and Human Behavior  
Minor: College Student Development

**Master of Health Science Education, 2004**

Department of Health and Human Behavior  
University of Florida, Gainesville, Florida

**Bachelor of Science, Health Science Education, 1999**

Department of Health and Human Behavior  
University of Florida, Gainesville, Florida

**Professional Experience in Higher Education****2018-Present Boise State University, Boise, ID**

*Associate Professor, Tenured*

School of Public and Population Health, College of Health Sciences, Boise State University

*Interim Divisional Dean, School of Public Health, Summer 2022-Present*

Supports the total operations of the School of Public Health including academic, student, and faculty affairs as well as accreditation, business operations, external partnerships, fundraising, and strategic planning.

*Associate Divisional Dean for Academic, Student & Faculty Affairs, Fall 2020-Present*

Supervises academic operations, student affairs, and faculty development for a department serving 1400 undergraduate and graduate students in public health and pre-clinical programs, including 22 full-time faculty members, 30+ adjunct faculty members, and staff.

*Editor, Journal of School Health, Spring 2021 – Present*

Editor of the leading journal in the field of school health and child/adolescent health promotion in schools.

*Director of Master of Public Health Programs, Fall 2018 – Spring 2022*

Ensures the quality of all department graduate programs, including master's degrees in:  
(1) Prevention and Intervention Programming, (2) Systems Analysis and Innovation, and  
(3) Health Leadership and Management, as well as a graduate certificates in Health  
Leadership and Data-Informed Decision-Making.

**2012-2018**

**West Virginia University, Morgantown, WV**

*Associate Professor, Tenured, Tenured May 15<sup>th</sup>, 2018*

*Assistant Professor, 2012-2018*

School of Public Health, Department of Social and Behavioral Sciences

*Director of MPH Programs, Fall 2016 – Summer 2018*

Ensures the quality of School of Public Health MPH programs in Biostatistics, Epidemiology,  
Health Policy, Occupational and Environmental Health, and Social and Behavioral Sciences,  
including accreditation by the Council on Education of Public Health Programs (CEPH).

*Director of School Health Programs & Health Education SPA Coord., Fall 2014 – Spring 2016*

Ensured quality of Bachelor's and Master's Programs in School Health Education and School  
Health Leadership, including subject matter accreditation and contributing to the College of  
Education's overall accreditation by the Council for Accreditation for Educator Preparation  
(CAEP).

*Co-Director of the ICE Collaborative, Fall 2013 – Summer 2018*

Manages a school-community partnership-based health promotion intervention including  
approximately 30 schools throughout West Virginia.

**2007-2012**

**California State University, Chico, CA**

*Assistant Professor, 2007-2012*

College of Behavioral and Social Sciences, Department of Health and Community Services

*Health Education SPA Coordinator, Fall 2010- Spring 2012*

Coordinated the health education subject matter accreditation (SPA) as part of the College  
of Education's accreditation by National Council for Accreditation of Teacher Education  
(NCATE).

*Director of REAL Programs, 2009-2012*

Designed and implemented school-based intervention programming for over 2,000  
vulnerable children and adolescents struggling with academic failure.

**2003-2007**

**University of Florida, Gainesville, FL**

*Instructor/Graduate Assistant,*

College of Health and Human Performance, Department of Health Education and Behavior

*Director of Project Challenge,*

Designed and implemented school-based, wilderness/adventure intervention programming  
for early adolescent girls at-risk of school failure & delinquency.

**Professional Experience in Education and Educational Administration  
with the AMI Kids Alternative School Organization**

**2000-2003 Regional Director & Director of Organization Development, AMI**

**Kids – Home Office, Tampa, FL**

- Supervised the total operations of 12 schools for at-risk youth located in North and Central Florida as Regional Director, including an annual budget of over 18 million dollars.
- Supervised the national departments/directors of education, training, leadership development, research, and case management as Director of Organization Development.
- Served as senior project manager for the president of the organization as Director of Organization Development. Coordinated the implementation of large-scale organization-wide projects.

**1998-2000**

**Principal/Executive Director,  
AMI Kids – Gulf Coast School, Bradenton, FL**

Managed the total operations of a school for at-risk youth.

- Oversaw education, case management and treatment services for area youth and families.
- Supported twenty-five team members as they pursued excellence as educators and youth development professionals.
- Oversaw all aspects of the school's annual budget of 1.3 million dollars and 2.4 million dollars in school assets.
- Managed all aspects of school finance and raised at least two hundred thousand dollars in grant monies or gifts per year.
- Worked with local legislative delegation to appropriate 1.2 million dollars for a new school building.

**1995-1998**

**Assistant Principal/Director of Operations,  
AMI Kids – Silver River School, Ocala, FL**

Managed the day-to-day operations of a school for at-risk youth.

- Supervised daily classroom academic lesson plans as well as the overall curriculum and corresponding thematic units. Heavily emphasized thematic, experiential, cooperative and project-based learning balanced with basic skill development and practice for remedial youth.
- Reviewed and approved all student and family case management plans, revisions to plans and field notes.
- Effectively managed student behavior through creating a structured environment filled with meaningful curricular and co-curricular opportunities.

**1992-1995**

**Teacher/Training Coordinator,  
AMI Kids – Gainesville School, Gainesville, FL**

- Classroom health and life management skills teacher in a school for youth at-risk of school failure and delinquency.
- Trained new personnel and coordinated the training of the educational staff.

### University Courses Developed and Taught

#### At Boise State University:

University Foundations 100: Health, Right or Responsibility? (undergraduate)  
 Contemporary Foundations of Public Health (graduate)  
 Framing Public Health Problems (graduate)  
 Public Health Management (graduate)  
 Seminar: Contemporary Issues in Public Health: Learning from the COVID-19 Response (graduate)

#### At West Virginia University:

Foundations of School Health Leadership (graduate and undergraduate)  
 Community and Context in School Health (graduate and undergraduate)  
 Health Education for Elementary Teachers (undergraduate)  
 Health Education for Secondary Teachers (undergraduate)  
 Student Teacher Seminar and Supervision for School Health Educators (undergraduate)  
 Foundations of Public Health (graduate – master’s and doctoral sections)  
 Social Determinants of Health (undergraduate)  
 Systems Thinking in Public Health Practice (graduate)

#### At California State University-Chico: (undergraduate)

Health Education for Secondary Teachers  
 Health Education for Elementary Teachers  
 School Health Programs  
 Health Education Techniques  
 Mental and Emotional Health Promotion

#### At the University of Florida: (undergraduate)

Foundations of Health Education  
 Community Health  
 Personal and Family Health  
 Student Internship Supervision

### Peer-Reviewed Publications

1. Kristjansson, A.L., **Mann, M.J.**, Smith, M.L., Kogan, S.M., Lilly, C., and James, J.E. (in press). Caffeine consumption and onset of alcohol use among early adolescents. *Accepted for Publication by Preventative Medicine, August 2022.*
2. Kidd K.M., Sequeira G.M., **Mann M.J.**, Smith M.L., Benton B.R. & Kristjansson AL. (2022). The Prevalence of Gender-Diverse Youth in a Rural Appalachian Region. *JAMA Pediatrics*. Published online August 08, 2022. doi:10.1001/jamapediatrics.2022.2768
3. Kristjansson A.L., Santilli A.M., Mills R., Layman H., Smith M.L., **Mann M.J.**, MacKillop J., James J.E., Lilly C., and Kogan S.M. (2022). Risk and Resilience Pathways, Community Adversity, Decision-making, and Alcohol Use Among Appalachian Adolescents: Protocol for the Longitudinal Young Mountaineer Health Study Cohort. *JMIR Research Protocols, 11(8)*, 1-14.
4. **Mann, M.J.**, Smith, M.L., Kristjansson, A.L., *Daily, S., McDowell, S. & Traywick, P.* (2021). Our Children Are Not “Behind” Due to the COVID-19 Pandemic, But Our Institutional Response Might Be. *Journal of School Health, 91(6)*, 447-450.

5. Mills, R., Mann, M.J., Smith, M.S & Kristjansson, A.L. (2021). Are Parental Support and Monitoring Differentially Associated with Adolescent Substance. *BMC Health, 21*(2000), 1-10, <https://doi.org/10.1186/s12889-021-12119-3>.
6. Kristjansson A.L., Lilly, CL., Thorisdottir, I.E., Allegrante, J.P., Mann, M.J., Sigfusson, J., Soriano, H.E. & Sigfusdottir, I.D. (2021). Testing risk and protective factor assumptions in the Icelandic Model of Adolescent Substance Use Prevention. *Health Education Research, electronic version in advance of print version, January 2021*, <https://doi.org/10.1093/her/cyaa052>.
7. Kristjansson, A.L., Mann, M.J., Sigfusson, J., Thorisdottir, I.E., Allegrante, J.P. & Sigfusdottir, I.D. (2020). Development and guiding principles of the Icelandic Model for Preventing Substance Abuse. *Health Promotion Practice, 21*(1), 62-69.
8. Kristjansson, A.L., Mann, M.J., Sigfusson, J., Thorisdottir, I.E., Allegrante, J.P. & Sigfusdottir, I.D. (2020). Implementing the Icelandic Model for Preventing Adolescent Substance Use. *Health Promotion Practice, 21*(1), 70-79.
9. Sigfusdottir, I.D., Soriano, H., Mann, M.J. & Kristjansson, A.L. (2020). Prevention is Possible: A brief history of the origin and dissemination of the Icelandic Prevention Model. *Health Promotion Practice, 21*(1), 58-61.
10. Daily, S., Mann, M.J., Lilly, C., Kristjansson, A.L., Davidov, D. & Bias, T. (2020). Using School Climate to Improve Attendance and Grades: Understanding the importance of school satisfaction among middle and high schoolers. *Journal of School Health, 90*(9), 683-693.
11. Daily, S., Mann, M.J., Lilly, C., Kristjansson, A.L., Davidov, D. & Bias, T. (2020). School Climate as an Intervention to Reduce Academic Failure and Educate the Whole Child. *Journal of School Health, 90*(3), 182-192.
12. Daily, S.M., Mann, M.J., Lilly, C.L., Bias, T.K., Smith, M.L., & Kristjansson, A.L. (2020). School climate as a universal intervention to prevent substance use initiation in early adolescence: a longitudinal study. *Health Education & Behavior, 47*(3), 402-411.
13. Smith, M.L., Mann, M. J., & Kristjansson, A. K. (2020). School Climate, Developmental Support, and Adolescent Identity Formation. *Journal of Behavioral and Social Sciences, 7*, 255-268.
14. Chester, A., McKendall, S., McKendall, A., Mann, M.J., Kristjansson, A.L., Branch, R. Hornbeck, B., Morton, C., Kuhn, S., Branch, F.S. & Barnes-Rowland, C. (2020). The Health Sciences and Technology Academy (HSTA): Providing 26 Years of Academic and Social Support to Underserved Youth in the State of West Virginia. *Journal of STEM Outreach, 3*(3), 1-14.
15. Mann, M.J. & Lohrmann, D.K (2019). Addressing Challenges to the Reliable, Large-Scale Implementation of Effective School Health Education. *Health Promotion Practice, 20*(6), 834-844.
16. Daily, S., Mann, M.J., Kristjansson, A.L., Smith, M.L. & Zullig, K. (2019). School Climate and Academic Achievement in Middle and High School Students. *Journal of School Health, 89*(3), 173-180.
17. Mann, M.J., Kristjansson, A.L., Smith, M.L., Daily, S.M, Thomas, S., & Murray, S. (2018). From Tactics to Strategy: Creating and Sustaining Social Conditions that Demand and Deliver Effective School Health Programs. *Journal of School Health, 88*(5), 333-336.
18. Daily, S., Zullig, K., Myers, E., Smith, M.L., Kristjansson, A.L. & Mann, M.J. (2018). Preliminary Validation of the School Climate Measure in a Sample of Public School Early Adolescents. *Assessment for Effective Intervention*, <https://doi.org/10.1177/1534508418815751>.
19. Kristjansson, A.L., Kogan, S., Mann, M.J., Smith, M.L., Julianno, L., Lilly, C. & James, J. (2018). Does Early Exposure to Caffeine Promote Other Substance Use? A Prospective Analysis of Middle School Students. *Addiction, 113*, 1706-1713.
20. Davidov, D.M., Coffman J., Dyer A., Bias T.K., Kristjansson A.L., Mann M.J., Vasile E. & Absildo C.G. (2018). Assessment and Response to Intimate Partner Violence in Home Visitation: A Qualitative Needs Assessment with Home Visitors in a Statewide Program. *Journal of Interpersonal Violence*, <https://doi.org/10.1177/0886260518754869>.
21. Kristjansson, A.L., Mann, M.J., & Smith, M.S. (2018). Social Profile of Middle School-Aged Adolescents who use Electronic Cigarettes: Implications for Primary Prevention. *Prevention Science, 19*, 805-812.

22. Kristjansson, A.L., **Mann, M.J.**, & Smith, M.L. (2017). Prevalence of Substance Use Among Middle School-Aged E-Cigarette Users Compared with Cigarette Smokers, Non-Users and Dual Users: Implications for Primary Prevention. *Substance Abuse, 38*(4), 473-476.
23. Kristjansson, A.L., **Mann, M.J.**, Sigfusson, J., Sarbu, E.A., Grubliauskiene, J., *Daily, S.M.*, Sigfusdottir, I.D. (2017). Prevalence of E-Cigarette Use Among Adolescents in 13 Eastern European Towns and Cities. *Public Health, 147*, 66-68.
24. *Dyer, A.M.*, Kristjansson, A.L., **Mann, M.J.**, Smith, M.L., & Allegrante, J.P. (2017). Sport Participation and Academic Achievement in High School Students: A Longitudinal Study. *American Journal of Health Behavior, 41*, 179-185.
25. Abildso, C.G., *Dyer, A.*, Kristjansson, A.L., Davidov, D., **Mann, M.J.**, Bias, R., Coffman, J., and Vasile, E. (2017). Evaluation of an Intimate Partner Violence Training for Home Visitors Using the Theory of Planned Behavior. ePublication ahead of print in *Health Promotion Practice, July 2017*.
26. Allar, I., Jones, Kristjansson, A.L., Elliott, E., Taliaferro, A., **Mann, M.J.** & Bulger, S. (2017). The Perceived Efficacy of the I am Moving, I am Learning Program: A Preliminary Investigation. *American Journal of Health Behavior, 41*(6), 683-692.
27. **Mann, M.J.**, Kristjansson, A., Smith, M., Sigfusdottir, I. D. (2016). The Influence of Negative Life Events on Problem Behavior and Grades in Early Adolescence: An Examination of Academic Risk in Middle School. *Research in Middle Level Education, 39*(10), 1-14.
28. **Mann, M.J.**, Kristjansson, A.L. & Smith, M.L. (2016). Energy Drink Consumption and Substance Use Risk in Middle School Students. *Preventative Medicine Reports, 3*, 279-282.
29. **Mann, M.J.**, Haley, P., Smith, M.L., & Kristjansson, A.L. (2016). REAL Girls at Chico Junior High: Enhancing Relevance in Clinical Preparation Experiences. In P.B. Howell, J. Carpenter & J. Jones (Eds.), *Clinical Preparation at the Middle Level: Practices and Possibilities* (pp. 205-231). Charlotte, NC: IAP.
30. Smith, M. L., **Mann, M. J.**, Georgieva, Z., Curtis, R., & Schimmel, C. (2016). What Counts When It Comes to Predicting School Enjoyment and Aspiration in Middle School? Accepted by *Research in Middle Level Education, 39*(8), 1-13.
31. **Mann, M.J.**, Smith, M. L., Kristjansson, A.L. (2015). Improving Academic Self-Efficacy, School Connectedness, and Identity in Struggling Middle School Girls: A Quasi-Experimental Study of the REAL Girls Program. *Health Education and Behavior, 42*(1), 117-126.
32. **Mann, M.J.**, Kristjansson, A.L., Sigfusdottir, I.D., & Smith, M.L. (2015). The Role of Community, Parent, Peer, and School Factors in Adolescent Bullying: Implications for School-Based Intervention. *Journal of School Health, 85*(7), 477-486.
33. Kristjansson, A.L., Sigfusdottir, I.D., Thorlindsson, T., **Mann, M.J.**, Sigfusson, J. & Allegrante, J.P. (2015). Population Trends in Smoking, Alcohol Use, and Primary Prevention Variables Among Adolescents in Iceland, 1997-2014. *Addiction, 111*, 645-652.
34. Kristjansson, A.L., **Mann, M.J.**, & Sigfusdottier, I.D. (2015). Licit and Illicit Substance Use by Adolescent E-Cigarette Users Compared with Conventional Cigarette Smokers, Dual Users, and Nonusers. *Journal of Adolescent Health, 57*, 562-564.
35. Kristjansson, A.L., **Mann, M.J.**, Sigfusdottir, I.D., & James, J.E. (2015). Mode of Daily Caffeine Consumption Among Adolescents and the Practice of Mixing Alcohol with Energy Drinks: Relationships to Drunkenness. *Journal of Studies on Alcohol and Drugs, 76*(3), 397-405.
36. **Mann, M.J.**, Kristjansson, A.L., Sigfusdottir, I.D., & Smith, M.L. (2014). The Impact of Negative Life Events on Young Adolescents: Comparing the Relative Vulnerability of Middle School, High School, and College-Age Students. *Research in Middle Level Education, 38*(2), 1-13.
37. **Mann, M.J.** & Smith, M.L. (2013). Promoting Rigor-in-Practice through School Self-Evaluation: A Middle School's Experience with Model Development, Implementation, and Evaluation. *Research in Middle Level Education, 37*(4), 1-15.
38. **Mann, M.J.** (2013). Helping Middle School Girls At-Risk for School Failure Recover Their Confidence and Achieve School Success: An Experimental Study of the Project Challenge Program. *Research in Middle Level Education, 36*(9), 1-14.

39. Kristjansson, A.L., Sigfusdottir, I.D., **Mann, M.J.**, & James, J.E. (2013). Caffeinated Sugar-Sweetened Beverages and Common Physical Complaints in Icelandic Children Ages 10-12 Years. *Preventative Medicine, 58*, 40-44.
40. Zullig, K.J., Uebbes, V.A., & **Mann, M.J.** (2013). Early Adolescent Literacy Influences, Reading Ability, and Preventative Health Behavior. *American Journal of Health Behavior, 28*(3), 114-126.
41. **Mann, M.J.** (2012). Improving Struggling Middle School Girls' Levels of Academic Self-Efficacy, School Connectedness, and Identity: A Pilot Study of the REAL Girls Program. *The Chronicle of Middle Level Research, 1*(12), 8-22.

### Manuscripts Under Peer-Review as of August 1<sup>st</sup>, 2022

1. *Woodward, T., Mann, M.J.,* Smith, M.S & Kristjansson, A.L. (under review). Estimating the Impact of Leisure Hours on Adolescent Substance Abuse. *Submitted to Health Education and Behavior*, January 2022.
2. *Layman, H., Mann, M.J.,* Smith, M.S & Kristjansson, A.L. (under review). Self-reported family income status and COVID-19-related stress among young adolescent girls and boys in Appalachia. *Submitted to the Journal of School Health*, February 2022.
3. Caine, C.A., **Mann, M.J.**, Thoridottir, I.E., Garcia, P.R., Sigfusdottir, I.D. and Kristjansson, A.L. (under review). Testing risk and protective factor assumptions in the Icelandic Prevention Model with data from Catalonia. Submitted to the *Journal of Substance Use*, August 2022.
4. McKendall, S., McKendall, A., **Mann, M.J.** and Kristjansson, A.L. (under review). Evaluating the HSTA Logic Model. Submitted to the *Journal of STEM Education*, August 2022.

### Manuscripts In-Progress as of August 1<sup>st</sup>, 2022

1. **Mann, M.J.**, Kristjansson, A.L. & Smith, M.L. (in-progress). The Community Engagement Index: Measuring the Impact of Civic Engagement, Service Learning, and Social Health Interventions in School-Age Adolescents.
2. **Mann, M.J.**, Kristjansson, A.L. & Smith, M.L. (in-progress). Beyond School Climate: Conceptualizing and Measuring School as a Protective Factor.
3. **Mann, M.J.** (in-progress). Re-Imagining the Full Promise of Schools: A Systems-Informed Approach to Achieving Integrated Academic, Health, and Developmental Outcomes for All Children.
4. **Mann, M.J.** (in-progress). Ensuring Student and Employee Safety in Schools: Guidelines for Effective Decision-Making While Facing Emerging Infectious Threats.
5. **Mann, M.J.** (in-progress). There Is Nothing to Fear: Responding to Concerns About Critical Race Theory in Schools and the Fear of Falling Behind in America.

### Invited Publications

1. **Mann, M.J.** (In press). The Need for a WSCC-Based School Health Research Agenda. In D.A. Birch, D.M. Videto, and H. Catalano (Eds.), *Promoting health and academic success: The Whole School, Whole Community, Whole Child approach* (2nd ed., pp. tba). Human Kinetics.



2. Kristjansson, A.L., Sigfusdottir, I.D., Mann, M.J., Thorisdottir, I.E. & Allegrante, J.P. (2021). Comment to Koning et al. Commentary on the Icelandic Prevention Model. Accepted by *Drugs: Education, Prevention, and Policy*, 28(4), 379-381.

### Editorials for The Journal of School Health, Not Peer Reviewed

1. Mann, M.J. (2022). Journal of School Health Research Priorities for 2022-2024. *Journal of School Health*, 92(1), 3-4.
2. Mann, M.J. (2022). Forgotten Student Needs: Providing Access to Play, Rest, Friendship, and Fun through Recess. *Journal of School Health*, 92(10), 3-4.

### Invited Keynote/Plenary Presentations – Academic and Professional

1. Mann, M.J. (2022). School as a Protective Factor. Invited plenary address at the Icelandic Centre for Social Research and Analysis international conference in Reykjavik, Iceland.
2. Mann, M.J. (2021). Moving Student and School Health from the Periphery to the Center of the Educational Enterprise. Invited keynote presentation at the Inaugural National School Health Action Congress co-sponsored by the American School Health Association and the Society of State-Level Health and Physical Educators.
3. Mann, M.J. (2020). Implementing the Icelandic Prevention Model: What Makes the Planet Youth Approach Different. Invited plenary address at the Icelandic Centre for Social Research and Analysis international conference in Reykjavik, Iceland.
4. Mann, M.J. (2019). What Makes the Planet Youth Approach Different: Understanding What Sets the Icelandic Prevention Approach Apart from Other Models of Intervention. Invited plenary address at the Icelandic Centre for Social Research and Analysis international conference in Reykjavik, Iceland.
5. Mann, M.J. (2019). Establishing Indisputable Priorities: Using Lessons Learned from Large-Scale Social Movements to Enhance Youth Advocacy and Promote Systems Change. Invited keynote address presented at the *International Conference on the Health Risks of Youth* in Cabo San Lucas, Mexico.
6. Mann, M.J. (2018). The Full Promise of Schools: Integrating Academic, Health, and Developmental Outcomes for All Students. Invited keynote address at the *Alaska Division of Public Health and Department of Education's Statewide School Health and Wellness Institute*.
7. Mann, M.J. (2018). The Full Promise of Schools: Integrating Academic, Health, and Developmental Outcomes for All Students. Invited keynote address at the *West Virginia Department of Education's* statewide KidStrong conference.
8. Mann, M.J. (2018). The Full Promise of Schools: Integrating Academic, Health, and Developmental Outcomes for All Students. Invited keynote address at the *Indiana School Health Association's* statewide conference.
9. Mann, M.J. (2018). The Full Promise of Schools: Integrating Academic, Health, and Developmental Outcomes for All Students. Invited keynote address at the Missouri, Kansas, Nebraska, and Iowa Regional Conference on Adolescent Health Promotion.
10. Mann, M.J. (2018). The Full Promise of Schools: Integrating Academic, Health, and Developmental Outcomes for All Students. Invited keynote address at *Pennsylvania State University's* statewide conference on school health promotion.
11. Mann, M.J. (2018). The Full Promise of Schools: Integrating Academic, Health, and Developmental Outcomes for All Students. Invited keynote address at the *Florida School Health Association's* statewide conference.

12. **Mann, M.J.** (2018). The Full Promise of Schools: Re-Designing Schools to Achieve Academic, Health, and Developmental Outcomes. Invited keynote address at the *State of New Mexico's Head to Toe Conference* for school health and child serving public health professionals, co-sponsored by the *State of New Mexico's Division of Child and Adolescent Health and Department of Education*.
13. **Mann, M.J.** (2018). Re-Thinking Resilience: Valuing and Protecting Vulnerable Children by Creating Social and Systems Change. Presented at the *West Virginia Children's Alliance* annual meeting.
14. **Mann, M.J.** (2018). A Systems-Informed Approach to Re-Designing Schools: Achieving Integrated Academic, Health, and Developmental Outcomes. Invited keynote address presented at the *International Conference on the Health Risks of Youth* in Clearwater, FL.
15. **Mann, M.J.** (2017). Healthy, High-Achieving, and Hopeful: The Full Promise of School Health. Invited keynote address presented at the *American School Health Association* national conference.

#### Peer-Reviewed Oral Presentations

1. Kristjansson, A.L., Smith, M.L., **Mann, M.J.**, Coffman, J., Jarrett, T. & Dino, G. (2022). Conducting Equitable Community Relevant Dissemination and Implementation Research in the Prevention Research Centers Program. Presented at the Society for Prevention Research National Conference.
2. Smith, M.L., *Bryant, J., Hill, A., Allan, H., Mann, M.J.* & Kristjansson, A. (2021) Unpacking suicidal ideation and completion in adolescent girls. Presented at the American Public Health Association National Conference.
3. Smith, M.L. & **Mann, M.J.** (2020) Lessons from a statewide effort to increase mental health in schools: SAMSHA's Project AWARE. Presented at the International Conference on the Health Risks of Youth.
4. Smith, M.L. & **Mann, M.J.** (2020) Policy as Prevention: A Grassroots Advocacy Approach to Promoting Health for LGBTQ Youth. Presented at the International Conference on the Health Risks of Youth.
5. **Mann, M.J.**, Kristjansson, A.L., Smith, M.L. & *Daily, S.* (2019). Using the Community Engagement and Engaging Differences Scales: Developing Student Capacity to Build Healthy and Diverse Communities. Presented at the American School Health Association national conference.
6. **Mann, M.J.** (2019). The Democratic Mission of Schools: Implications for Student Empowerment, Inclusivity, and Solving Complex Social Problems. Presented at the American School Health Association national conference.
7. **Mann, M.J.** & Lohrmann, D.K. (2019). Addressing Challenges to the Reliable, Large-Scale Implementation of Effective School Health Through Effective Advocacy and Enhanced Partnerships. Presented at the Elena Slipiviech Symposium on the Future of School Health.
8. Birch, D.A., Lyde, A.R., Lohrmann, D.K., **Mann, M.J.** & Auld, E. (2018). The Future of School Health Education in the 21<sup>st</sup> Century. Presented at the SOPHE national conference.
9. **Mann, M.J.**, Smith, M.L., Kristjansson, A.L., Daily, S. & Thomas, S. (2017). School Climate and Mental Health in Middle and High School students: Evidence from Project AWARE in West Virginia. Presented at the Annual Conference on Advancing School Mental Health national meeting.
10. Smith, M.L., *Daily, S., Thomas, S.,* Kristjansson, A.L. & **Mann, M.J.** (2017). School Climate: A Whole Child Intervention that Reduces Academic Risk. Presented at the American School Health Association national conference.
11. *Thomas, S., Daily, S.,* Smith, M.L., Kristjansson, A.L. & **Mann, M.J.** (2017). School Climate and Indicators of Emotional Distress. Presented at the American School Health Association national conference.
12. *Daily, S., Thomas, S.,* Smith, M.L., Kristjansson, A.L. & **Mann, M.J.** (2017). School Climate: Promoting the Positive Dimensions of Students' Emotional Well-Being. Presented at the American School Health Association national conference.

13. Lyde, A., **Mann, M.J.** & Goekler, S. (2017). Updating School Health Education Teacher Preparation Standards. Presented at the American School Health Association national conference.
14. **Mann, M.J.**, Smith, M. L. & Kristjansson, A.L. (2017). School Climate, Student Developmental Needs, and Risk of Academic Failure: A Whole Child Model. Presented at the International Conference on the Health Risks of Youth annual conference.
15. **Mann, M.J.**, Kristjansson, A.L. & Smith, M. L. (2017). Community Engagement and Engaging Differences: Understanding and Predicting Young People's Capacity to Build Healthy Communities as Adolescents and Adults. Presented at the International Conference on the Health Risks of Youth annual conference.
16. Lyde, A.R., Dake, C., Jackson, J., **Mann, M.J.**, Nobling, B.D. & Auld, E. (2017). Improving the Profession's Capacity for Effective School Health Education: Revising the School Health Education Teacher Preparation Standards. Presented at the Society of Public Health Education annual conference.
17. **Mann, M.J.**, Smith, M. L. & Kristjansson, A.L. (2016). How School Climate and Adolescent Development Impact Health Outcomes: A Conceptual Model. Presented at the American Public Health Association annual conference.
18. **Mann, M.J.**, Smith, M. L. & Kristjansson, A.L. (2016). Creating School Environments Specifically for Middle School Students. Presented at the Association for Middle Level Education national conference.
19. Smith, M.L., & **Mann, M.J.** (2016). School Climate, Developmental Needs Satisfaction, and Positive Identity Formation. Presented at the International Society for Research on Identity international conference.
20. **Mann, M.J.** (2015). How Teachers May Provide Effective Support to Middle School Students After the Death of a Parent. Presented at the American School Health Association national conference.
21. **Mann, M.J.**, Kristjansson, A.L. & Smith, M.L. (2014). The Community Engagement Scale. Presented at the American Public Health Association's annual conference.
22. **Mann, M.J.** & Smith, M.L. (2014). The Model of Empowered Student Behavior for Alternative Middle Schools. Presented at the Association for Middle Level Educators' national conference.
23. **Mann, M.J.** & Smith, M.L. (2014). Supporting Middle School Students Grieving the Loss of a Parent. Presented at the Association for Middle Level Educators' national conference.
24. **Mann, M.J.** & Smith, M.L. (2014). Professional Development Planning for Pre-service and Early Career Teachers. Presented at the Association for Middle Level Educators' national conference.
25. Smith, M.L. & **Mann, M.J.** (2014). Developmentally Responsive Middle School Educators: Application to Practice. Presented at the Association for Middle Level Educators' national conference.
26. Kristjansson, A.L., **Mann, M.J.** & Sigfusdottir, I.D. (2014). School and Community Partnerships that Work: The Integrated Community Engagement Collaborative (ICE). Presented at the American School Health Association annual conference.
27. **Mann, M.J.** & Smith, M.L. (2013). What Works with Struggling Middle School Girls: 12 Elements of Effective Intervention Programs. Presented at the American School Health Association national conference, October 2013.
28. Misra, R. & **Mann, M.J.** (2013). Professional Development Planning for School Health Professionals. Presented at the American School Health Association national conference, October 2013.
29. **Mann, M.J.**, Kristjansson, A.L., & Smith, M.L. (2013). Improving Struggling Middle School Girls' Levels of School Connectedness, Academic Self-Efficacy, and Identity: A Mixed-Methods Quasi-Experimental Study of the REAL Girls Program. Presented at the SOPHE national conference.
30. **Mann, M.J.** (2010). What Works with Middle School Girls At-Risk: Lessons from the REAL Girls and Project Challenge Programs. Presented at the Association of Middle Level Educators national conference, November 2010.

**Peer-Reviewed Poster Presentations**

1. Kidd, K.M., Sequeira, G.M., **Mann, M.J.**, Smith, M.L, Benton, B.R., & Kristjansson, A.L. (2022). *The Prevalence of Gender-Diverse Youth in a Rural Appalachian Region*. Poster Presentation at the World Professional Association for Transgender Health Conference: Montreal, Quebec, Canada.
2. *Woodward, T., Mann, M.J.* & Smith, M.L (2021). Comparing the Relative Influence of Family, Peer, School and Leisure Factors on Adolescent Substance Abuse. Poster presentation at the American School Health Association national conference.
3. Auld, E.A., Goekler, S., Lyde, A., Dake, C., Noble, B. & **Mann, M.J.** (2019). Proposed Entry-Level Health Education Teacher Preparation Standards. Poster presentation at the American School Health Association national conference.
4. Auld, E.A., Birch, D., Lohrmann, D.L., Dake, J. & **Mann, M.J.** (2019). Recommendations for Strengthening School Health Education: Charting a New Path Forward. Poster presentation at the American School Health Association national conference.
5. *Daily, S., Mann, M.J.*, Lilly, C.L., Bias, T.K., Smith, M.L. & Kristjansson, A.L. (2019). School Climate as Universal Intervention for Preventing Substance Abuse in Early Adolescence. Poster presentation at the Society for Public Health Educators national conference.
6. *Daily, S., Mann, M.J.*, Lilly, C.L., *Dyer, A. M.*, Smith, M.L. & Kristjansson, A.L. (2019). School Climate as an Intervention to Reduce Academic Failure and Educate the Whole Child. Poster presentation at the Society for Public Health Educators national conference.
7. *Daily, S., Mann, M.J.*, Kristjansson, A.L., Davidov, D.M., Smith, M.L & Lilly, C.L. (2019). Using School Climate to Impact School Attendance: Understanding the Importance of School Satisfaction between Middle and High School Students. Poster presentation at the Society for Public Health Educators national conference.
8. Kristjansson, A.L., **Mann, M.J.** & Smith, M.L. (2017). Social Profile of Middle School-Aged Adolescents Who Initiate Electronic Cigarettes: Implications for Primary Prevention. Poster presentation at the American Public Health Association national conference.
9. *Daily, S.*, Zullig, K., Myers, E., Kristjansson, A.L., **Mann, M.J.** & Smith, M.L. (2017). Preliminary Psychometric Support for the School Climate Measure in a Sample of Early Adolescents. Poster presentation at the American Public Health Association national conference.
10. *Daily, S.*, Zullig, K.J., Kristjansson, A.L. & **Mann, M.J.** (2017). Psychometric Support of the School Climate Measure in a Sample of Appalachian youth. Presented at the Society of Public Health Education annual conference.
11. Smith, M.L., Markstrom, C.A., Kristjansson, A.L. & **Mann, M.J.** (2016). School Climate, Early Adolescent Development, and Identity: Associations with Adjustment Outcomes. Presented at the Society for Research on Adolescence national conference.
12. Smith, M.L., Kristjansson, A. L., & **Mann, M.J.** (2015). How School Climate and Adolescent Development Impact Health Behavior: A Conceptual Model. Presented at the American School Health Association national conference.
13. **Mann, M.J.**, Kristjansson, A.L. & Smith, M.L (2014). Negative Life Events and Early Adolescent Emotional Health: Examining the Relative Vulnerabilities of Younger and Older Adolescents. Presented at the Society for Research on Adolescence biennial conference.
14. Smith, M.L & **Mann, M.J.** (2014). Strong, Capable, and Confident: Evaluating Developmental Intervention Strategies Designed to Promote Resilient Identity in Vulnerable Early Adolescent Girls. Presented at the Society for Research on Identity Formation annual meeting.
15. Kristjansson, A.L., **Mann, M.J.**, & Sigfusdottir, I.D. (2013). Using Data Collection and Reporting Strategies to Increase Community-Level Attention, Interest, and Investment in Improving Community Health. Presented at the Society of Public Health Educators national conference.

**Other Invited Academic and Professional Presentations**

1. **Mann, M.J.** (2022). Engaging Differences and Community Engagement: An Applied Understanding of Cultural Competence, Respect, and Public Health. Presented to the Idaho Central Health District, Clinical Health Unit, February 2022.
2. **Mann, M.J.** (2021). The Icelandic Prevention Model: Implementing Effective School, Parent, and Community Partnerships that Prevent Adolescent Substance Use and Abuse. Invited oral presentation at the International Congress on Addiction Prevention, León, Mexico.
3. **Mann, M.J.** (2021). The Icelandic Prevention Model: Developing Effective Action and Dissemination Plans. Invited oral presentation at the International Congress on Addiction Prevention, León, Mexico.
4. Canney, S., Barber, R., Nind, M., Gordard, S. & **Mann, M.J.** (2021). Publishing Your Work in Wiley Education Journals. Panelist for the Wiley International Author Development Series, October 2021.
5. **Mann, M.J.** (2020). Preparing Students and Staff to Cope with the COVID-19 Pandemic in Schools. Session moderator at the ASHA Special Conference on Equipping Schools to Meet the Challenges of COVID-19, July 2020.
6. **Mann, M.J.** (2020). Engaging Differences and Community Engagement: An Applied Understanding of Cultural Competence, Respect, and Public Health. Presented to the Idaho Central Health District, Public and Environmental Health Unit, February 2020.
7. Smith, M.L. & **Mann, M.J.** (2019). Emphasizing Prevention in Public Health: An Example of Effective Nation-Level Systems Change. Invited oral presentation at the Boise State University Mandela-Washington Fellows Program.
8. Smith, M.L. & **Mann, M.J.** (2019). The Icelandic Prevention Model: Key Principles, Processes, and Steps to Implementation. Invited oral presentation at the Idaho Conference on Alcohol and Drug Dependency.
9. **Mann, M.J.** (2018). Promoting Social and Systems Change in Public Schools: Historical Lessons About Systems Population Level Change. Invited oral presentation at the Indiana School Health Association's statewide conference.
10. **Mann, M.J.** (2018). The Full Promise of School Workshop: Addressing the Practical Nuts-and-Bolts Challenges of Social and Systems Change. Invited oral presentation/workshop at the Alaska Division of Public Health and Department of Education's statewide School Health and Wellness Institute.
11. **Mann, M.J.** (2018). Addressing the Practical Nuts-and-Bolts Challenges of Social and Systems Change: Implementing the Full Promise of Schools. Invited oral presentation at the Missouri, Kansas, Nebraska, and Iowa regional conference on adolescent health promotion.
12. **Mann, M.J.** (2018). More Tactics to Strategy: Session 2. Invited oral presentation to further discuss the "in press" manuscript of the same name. Invited oral presentation for the *Society of Public Health Educator's Child, Adolescent, and School Health* special interest group.
13. **Mann, M.J.** (2017). From Tactics to Strategy: Creating and Sustaining Social Conditions that Demand and Deliver Effective School Health Programs - Session 1. Invited oral presentation to discuss the "in press" manuscript of the same name. Invited oral presentation for the *Society of Public Health Educator's Child, Adolescent, and School Health* special interest group.
14. **Mann, M.J.**, Smith, M.L., & Kristjansson, A.L. (2016). New Directions in Middle Level Education: The Influence of Negative Life Events on Problem Behavior and Grades in Early Adolescence. Invited oral presentation to discuss the previously published article of the same name. Presented at the *Association for Middle Level Education* national conference.
15. Smith, M. L., **Mann, M.J.**, & Kristjansson, A.L. (2016). New Directions in Middle Level Education: What Counts When It Comes to Predicting School Enjoyment and Aspiration in Middle School. Invited oral presentation to discuss the previously published article of the same name. Presented at the *Association for Middle Level Education* national conference.

16. **Mann, M.J.**, Smith, M.L., Kristjansson, A.L., & Sigfusdottir, I.D. (2015). The Impact of Negative Life Events on Young Adolescents: Comparing the Relative Vulnerability of Middle School, High School, and College-Age Students. Invited oral presentation to discuss the previously published article of the same name at the *Association for Middle Level Educators* national conference.
17. **Mann, M.J.** & Smith, M.L. (2015). Promoting Rigor-in-Practice through School Self-Evaluation: A Middle School's Experience with Model Development, Implementation, and Evaluation. Invited oral presentation to discuss the previously published article of the same name at the *Association for Middle Level Educators* national conference.
18. **Mann, M.J.** (2013). Helping Middle School Girls At-Risk for School Failure Recover Their Confidence and Achieve School Success. Invited oral presentation to discuss the previously published article of the same name at the *Association for Middle Level Educators* national conference.

### Invited Expert Panelist or Expert Testimony

1. Panelist. Centers for Disease Control and Prevention, Division of Adolescent and School Health (DASH). Taskforce on student equity and during the COVID-19 Pandemic. August 2020.
2. Panelist-Consultant. Centers for Disease Control and Prevention, Division of Adolescent and School Health (DASH). Building educator skills in teaching (BEST): Understanding essential knowledge and skills for health education. June 2020.
3. Expert Testimony. State of Vermont Senate Panel on Health and Welfare. Adolescent substance abuse prevention and the Icelandic Prevention Model. April 2019.
4. Expert Testimony. State of Vermont House of Representatives Panel on Health and Welfare. Adolescent substance abuse prevention and the Icelandic Prevention Model. April 2019.

### Invited Community Presentations

1. Implementing the Icelandic Prevention Model. Presented at the Vermont Afterschool, Inc.'s Planet Youth Community Coalitions Conference, October 2019.
2. The Icelandic Prevention Model: Description, Results, and Implications for Adolescent Substance Abuse Prevention. Presented at the Vermont Department of Health, March 2019.
3. The Icelandic Prevention Model: Description, Results, and Implications for Adolescent Substance Abuse Prevention. Presented to the Vermont State Opioid Coordination Council meeting, March 2019.
4. The Icelandic Prevention Model: Description, Results, and Implications for Adolescent Substance Abuse Prevention. Presented at a University of Vermont faculty and student town hall on adolescent substance abuse prevention, March 2019.
5. The Icelandic Prevention Model: Description, Results, and Implications for Adolescent Substance Abuse Prevention. Presented at a University of Vermont sponsored community town hall, March 2019.
6. The Icelandic Prevention Model: Description, Results, and Implications for Adolescent Substance Abuse Prevention. Presented at the Regional Prevention Partners Meeting sponsored by Franklin County Caring Communities, March 2019.
7. The Icelandic Prevention Model: Description, Results, and Implications for Adolescent Substance Abuse Prevention. Presented to the School Leadership Teams at Franklin Northwest and Franklin Northeast Supervisory Unions, March 2019.
8. The Icelandic Prevention Model: Description, Results, and Implications for Adolescent Substance Abuse Prevention. Presented at the Regional Prevention Partners Meeting sponsored by the THRIVE Coalition.

9. School is Community: Establishing the Benefits of Building Community Within Schools and With the Community-at-Large. Presented at West Virginia Department of Education's KidStrong Conference, June 2017.
10. West Virginia Project AWARE: Keys to Establishing Effective Data Collection and Reporting Partnerships. Presented to an evaluation and data collection workgroup facilitated by SAMSHA's national Project AWARE Data Collection Community of Practice, May 2017.
11. New Possibilities in Program Evaluation: How to be Confident in Our Efforts to Help West Virginia's Children and Families. Presented at the West Virginia Celebrating Connections Early Childhood Conference, April 2016.
12. Data Analysis and Presentation Strategies for Building Community-Level Capacity and Support for Student Achievement and School Success. Presented to the West Virginia Department of Education School Improvement Section, March 2016.
13. ICE Report Findings for Blennerhassett Junior High School, Parkersburg, West Virginia: Faculty Presentation. Presented October 2015.
14. ICE Report Findings for Williamstown Junior/Senior High Schools, Williamstown, West Virginia: Parent, Guardian, and Community-at-Large Presentation. Presented October 2015.
15. ICE Report Findings for Williamstown Junior/Senior High Schools, Williamstown, West Virginia: Faculty Presentation. Presented October 2015.
16. ICE Report Findings for Williamstown Junior/Senior High Schools, Williamstown, West Virginia: Steering Committee Presentation. Presented September 2015.
17. ICE Report Findings for Edison Junior High School, Parkersburg, West Virginia: Faculty Presentation. Presented September 2015.
18. The Integrated Community Engagement Collaborative (ICE). Presented at the West Virginia Department of Education's KidStrong Conference for School Health Education Professionals, June 2014.
19. The Community Engagement and Engaging Difference Scales: Measuring the Development of Bonding and Bridging Social Capital in School-Age Children. Presented to the Prevention Research Center's Board of Directors, February 2014.
20. Preparing Students to Design Community-Based Participatory Research Projects that Promote Student and Community Development. Presented to the Health Science and Technology Academy's Leadership and Faculty Members, June & October 2013.
21. Using Conceptual Models to Enhance Program Fidelity: Presenting the HSTA Way. Presented to the Health Science and Technology Academy's Leadership and Faculty Members, April 2013.
22. What Works in STEM Pipeline Programming: Discussing HSTA's Approach to Providing Student Services. Presented to the Health Science and Technology Academy's Leadership and Faculty Members, October 2012.
23. Developing Middle Schools that Best Promote Student Health, Well-being, and Readiness to Learn: A Systems Approach. Presented to Wildflower Charter Schools Boards of Directors, Faculty, and Parents, February, 2011.
24. Using Adventure Programming to Promote the Healthy Psychosocial Development of Early Adolescents: The Impact of Challenge and Viscerality on Self-Confidence. Presented to the American River Association's California State Conference, April 2009.
25. Building Collaborative Models that Guide Effective Community Practice. Presented to the Silver River Marine Institute Administration, Faculty, and Board of Directors, August 2008.

### Externally Funded Projects

#### Program Planning and Evaluation Grants and Contracts:

1. 2022, Co-I, Supporting Adolescent Mental Health in Schools, Idaho Department of Health and Welfare, \$630,000.00.
2. 2021, Co-I, Statewide School Health Assessment for St. Luke's Hospital System, St. Luke's Hospital System, \$50,000.00.
3. 2019-2024, Co-PI, Adapting the Icelandic Model of Prevention to the Appalachian Context, Centers for Disease Control, U48 - \$2.0m.
4. 2019-2024, Co-I, Risk and Resilience Pathways Linking Community Adversity, Decision-making, and Alcohol Misuse: A prospective study of Appalachian adolescents, National Institute on Drug Abuse, National Institutes of Health, R01 - \$2.5m.
5. 2018-2023, Co-PI, West Virginia Statewide Family-School Partnership Centers, US Department of Education, Office of Innovation and Improvement - \$600,000.00
6. 2014-2019, Co-PI, Evaluating the State-Level Now Is the Time: Project Aware, SAMSHA and West Virginia Department of Education - \$435,435.00
7. 2014-2019, Co-PI, Evaluating the County-Level Now Is the Time: Project Aware, SAMSHA and West Virginia Department of Education - \$149,988.00
8. 2015-2018, Co-I, Evaluation of the Health Sciences and Technology Association, Annie E. Casey Foundation - \$220,000.00
9. 2014-2017, Co-PI, Increasing Father Participation in Early Childhood Parenting Programs, West Virginia Department of Health and Human Resources, Office of Maternal and Child Health - \$350,000.00
10. 2014-2016, Co-I, Evaluating Project LAUNCH, West Virginia Department of Health and Human Resources, Office of Maternal and Child Health - \$198,170.00
11. 2014-2016, Co-I, Evaluating Domestic Violence Screening in West Virginia: Impacts on Children and Caregivers, West Virginia Department of Health and Human Resources, Office of Maternal and Child Health - \$386,282.00
12. 2014-2016, Co-PI, Evaluating West Virginia's Women on Wellness Program, National Center for Excellence in Women's Health - \$67,000
13. 2014-2016, Co-I, Program Planning to Prepare Students to Bring CBPR to Their Communities, Health Sciences and Technology Academy - \$45,627.00
14. 2007-2010, PI, Silver River Alternative School, Contracted program planning and evaluation services - \$54,000

#### Operational Funding for the *ICE Collaborative*

15. 2017-2018, Co-I, Bernard McDonough Foundation, \$15,000.00
16. 2014-2018, Co-PI, Sisters of Saint Joseph's Charitable Organization, \$70,000.00

#### Operational Funding for the *REAL Girls* program:

17. 2007-2011, Co-I, Sierra Cascade Nutrition and Activity Consortium (SCNAC) Grant, Federal Nutrition and Physical Activity Education Grant - \$55,000.00

#### Operational Funding for the *Project Challenge* Program:

18. 2005-2008, Co-PI, National Forest Service, Youth Development Grant - \$476,000.00
19. 2005-2008, Co-PI, Community Council on Addictions and Substance Abuse, Prevention Grant - \$228,000.00

#### Operational and Capital Funding for the *Gulf Coast Marine Institute*:

20. 2000, Legislative capital appropriation to build a new school building - \$1,200,000.00



21. 1998-2000, United Way Program Services Grant - \$200,000.00
22. 1998-2000, Florida Juvenile Justice Prevention Grant - \$200,000.00

### **Submitted, But Unfunded Proposals for External Funding**

1. Co-I, WVU-Clemson Broad Implementation Advancing Informal Science Learning. Submitted to the National Science Foundation, October 2016.
2. Co-I, Building an Effective Minority Health Sciences STEM Pipeline – HSTA/HATCH/ITEST. Submitted to the National Science Foundation, November 2015.
3. Co-I, Adolescent Caffeine Use and Substance Use, R21. Submitted to the US National Institute on Drug Abuse, November 2015.
4. Co-I, Building Statewide Capacity of Teen Parenting Prevention. Submitted to the US Substance Abuse and Mental Health Services Administration, February 2015.
5. Co-I, Implementing Evidence-based Teen Parenting Programs at Scale. Submitted to US Substance Abuse and Mental Health Services Administration, February 2015.
6. Co-I, School-Based Early Detection: Teacher Nomination, Peer Report, and Adolescent Risk for Harming Themselves or Others. Submitted to the Center for Injury Prevention and Control, May 2014.
7. Co-I, Instrument Development for Assessing the Impact of Adolescent Caffeine Use, R21. Submitted to the National Institutes of Health, May 2014.
8. Co-PI, Validating the Community Engagement and Engaging Differences Scales, R21. Submitted to the National Institutes of Health, February 2014.
9. Co-I, Evidence-Based Health Promotion Across the Lifespan in Faith-Based Organizations in Rural West Virginia, National Prevention Partnership Award. Submitted to the US Department of Health and Human Services, February 2014.
10. Co-I, Underrepresented Minority Students' Pathways to Biomedical and Behavioral Health Research, R01. Submitted to the National Institutes of Health, September 2013.
11. Co-I, Health Sciences and Technology Academy Science Education/Drug Abuse Partnership Award, R25. Submitted to the National Institutes of Health, May 2013.
12. Co-I, WVU-Clemson Broad Implementation: Advancing Informal Science Learning. Submitted to the National Science Foundation, November 2016.

### **Service to the University, Profession, and Community**

#### University Service at Boise State University:

- Chair, Department Graduate Education Committee, 2018-2020; Co-Chair, 2020-Present
  - Chair, Department Graduate Admissions Sub-Committee, 2019-Present
  - Member, Department Graduate Admissions Sub-Committee, 2018.
- Chair, Department Ad Hoc Committee, Strategic Plan for Transitioning from a Department to a School of Public Health, 2020-21.
- Chair, Department Faculty Affairs Committee, 2019-2020
- Chair, Department Hiring Committee for OEHS, 2018-2019
  - Chair, Ad Hoc Department Expedited Promotion and Tenure Review for New Faculty, 2019.
    - Member, College of Health Sciences Promotion and Tenure Committee, 2019-20, 2021-Present
- Member, School of Allied Health Sciences Policy Development Committee, 2018-2020
- Member, School of Allied Health Sciences PhD Exploratory Committee, 2018-2020
- Panelist, College 2019 Fall Meeting: Discussed graduate education, 2019.

- Presenter, University Mandela-Washington Fellows Program, 2019.

University Service at West Virginia University:

- Facilitator, WVU SPH Faculty Council Awards Committee, 2018.
- Member, WVU Health Sciences Center Graduate Council, 2015-Present
- Member, WVU School of Public Health Academic Coordinating Council, 2015-Present
- Student Advisor and Founder, WVU School of Public Health Undergraduate Research Group, 2015-2016.
- Member, Department MPH Revisions Work Group, 2015-2016
- Member, Department School Health Programs Committee, 2015-2016
- Program Coordinator and Student Advisor, School Health Undergraduate/Graduate Programs, 2014-2015
- Chair, WVU School of Public Health Curriculum Committee, 2013-2015
- Member, WVU School of Public Health Diversity Committee, 2013-2015
- Member, WVU School of Public Health Curriculum Committee, 2012-2013
- Member, WVU Professional Education Programs Coordinating Committee, 2012-2016
- Chair, WVU School of Public Health Curriculum Committee Process Sub-committee, 2012-2013
- Co-Chair, SBHS Culminating Experience Thesis Option Ad Hoc, 2013
- Member, Worksite Wellness Area of Emphasis Ad Hoc Committee, 2012-2014
- Member, SBHS Ph.D. Teaching Ad Hoc, 2012-2013
- Member, SBHS Ph.D. Admissions Committee, 2012-2015

University Service at California State University-Chico:

- Chair, University Faculty Reward, Award, and Support committee, 2010-2012.
- Member, University Faculty Reward, Award, and Support committee, 2009-2010.
- Member, University Single and Multiple Subject Teacher Credential Committees, 2007-2012.
- Chair, College Curriculum Committee, 2011-2012.
- Member, College Curriculum Committee, 2008-2011.
- Chair, Department Curriculum Committee, 2008-2012.
- Academic Advisor, Teacher Credential/Certification Program, 2007-2012.
- Student Advisor and Founder, Graduate School Preparation Group, 2010-2012.
- Student Advisor, College of Behavioral and Social Science's Student Ambassadors, 2010-2011.
- Student Advisor, Health Professionals Association, 2010-2012.

University Service at the University of Florida: (as a graduate student)

- Member, Healthy Campus Initiative Committee, 2005-2007.
- Member, Graduate Student Advisory Council for the College of Health and Human Performance, 2005-2007.

Professional Service:

- Editor, Journal of School Health, 2021-Present
- Member, Expert Review Group of the National Consensus on School Health Education, 2021-Present
- Co-Founder, School Health Action Congress, 2021-2022 (Inaugural Congress, July 2021)
- Board Member, State Board, Idaho Public Health Association, 2021-2022
- Member, National Committee, National Committee on the Future of School Health Education, sponsored by the Society for Public Health Education (SOPHE), 2016-2021
- Member/Founder, ASHA Special Conference on Equipping Schools to Meet the Challenges of COVID-19, January 2020-July 2020. Conference held in July 2020.

- Board Member, National Board, American School Health Association, 2015-2020
  - Vice President, Board Officer, 2019-2020
  - Chair, Governance Committee, 2019-2020
  - Committee Member, Finance Committee, 2014-2015, 2016-2020
  - Committee Member, Organizational Strategy Committee, American School Health Association, 2016-2017, 2018-19
  - Committee Member, Governance Committee, American School Health Association, 2015-2016
- Member-National Committee, National School Health Education Teacher Preparation Program Standards Committee, sponsored by the Society for Public Health Education (SOPHE) and the Commission for Accrediting Education Programs (CAEP), 2016-2020
- Editorial Board Chair and Reviewer, Journal of School Health, 2018-2020
- Editorial Board Member and Reviewer, Journal of School Health, 2015-2017
- Editorial Board Member and Reviewer, Middle School Journal, 2016-2018
- Editorial Board Member and Reviewer, Research in Middle Level Education, 2013-2015
- Reviewer, Health Promotion Practice, 2019-Present
- Reviewer, Journal of School Health, 2014-Present
- Reviewer, Health Education and Behavior, 2014-Present
- Reviewer, Middle School Journal, 2014-2018
- Reviewer, BMC Public Health, 2014
- Reviewer, Eta Sigma Gamma Student Monograph, 2012-2013
- Reviewer, American Educational Research Association's National Conference, 2012-2013

#### Community Service:

- Board Member, Anser Charter School, Boise, Idaho, 2019-Present
  - Member, COVID Response Committee, 2020-Present
  - Member, Diversity, Equity, Inclusion, and Justice Committee, 2021-Present
  - Chair, Education Committee, 2022-Present
  - Member, Education Committee, 2020-2021
- Board Member, West Virginia Health Science and Technology Academy, 2012-2018
  - Chair, Curricula and Program Committee, Health Science and Technology Academy, 2015-2016.
- Member, West Virginia Department of Education's Community Schools Work Group, 2015-2017
- Founding Board Member, Jesse Kohen Foundation, 2011-2013.
- Founding Board Member, Wildflower Elementary School, 2009-2011.

#### Professional Affiliations

**Member**, American School Health Association (ASHA), 2004 – Present  
**Member**, Society for Professional Health Education (SOPHE), 2012 – Present  
**Member**, American Public Health Association (APHA), 2014 – Present  
**Member**, Idaho Public Health Association (IPHA), 2018 – Present  
**Member**, Association of Middle Level Educators (AMLE), 2008 – 2018  
**Member**, American Educational Research Association (AERA), 2008 – 2018

### Honors and Awards

- Recipient, 2022.** Distinguished Service Award, American School Health Association.
- Nominee, 2022.** Golden Apple Award for Teaching Excellence, Boise State University.
- Recipient, 2020.** Presidential Citation for Distinguished Service, American School Health Association.
- Recipient, 2019.** Outstanding School Health Researcher, American School Health Association
- Recipient, 2019.** Presidential Citation for Distinguished Service, Society of Public Health Educators.
- Recipient, 2018.** Fellow of the American School Health Association.
- Recipient, 2018.** Presidential Citation for Distinguished Service, American School Health Association.
- Recipient, 2018.** Excellence in Service, West Virginia University's School of Public Health Faculty Council.
- Elected, 2018.** West Virginia University Faculty Senate representing the School of Public Health.
- Nominee, 2018.** West Virginia University Faculty Mentor Award.
- Recipient, 2017.** John P. McGovern Award for the Distinguished Lectureship in School Health, American School Health Association.
- Finalist, 2017.** Faculty Award for Distinction in Mentoring of Undergraduates in Research, West Virginia University.
- Recipient, 2016.** Presidential Citation for Distinguished Service to the Organization, American School Health Association.
- Nominee, 2015.** Outstanding Service Award, West Virginia University Health Sciences Center.
- Honoree, 2007-2008.** REAL Girls service program highlighted in the CSU Annual President's Report.
- Honoree, 2008.** REAL Girls service program chosen by CSU-Chico as an example of excellence in Service learning for publication in the *National Guide to Service Learning Colleges and Universities*.
- Recipient, 2005.** Calvin A. Van Der Beek Graduate Student Teaching Award, University of Florida.
- Recipient, 2003-2007.** University Alumni Fellowship, University of Florida.
- Recipient, 2002.** Deemed Status Schools/Programs as Regional Director (Top 3% of Florida alternative schools)
- Escambia Bay Marine Institute
  - Emerald Coast Marine Institute
  - West Florida Wilderness Institute
  - Panama City Marine Institute
  - New Port Ritchey Marine Institute
- Recipient, 2000.** Deemed Status School/Program as Principal/Executive Director, Gulf Coast Marine Institute.
- Recipient, 1999.** New Executive Director/Principal of the Year, Associated Marine Institutes.

**Ellen J. Schafer, PhD, MPH, MCHES®**

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**EDUCATION & TRAINING**

- 2016 – 2018      **University of South Florida – College of Public Health**  
 Tampa, FL  
 Postdoctoral Fellow in Community and Family Health  
 Center of Excellence in Maternal and Child Health Education, Science, and Practice
- 2012 – 2015      **University of Iowa – College of Public Health**  
 Iowa City, IA  
 Ph.D. in Public Health – Community and Behavioral Health  
 Graduated: December 2015
- 2011 – 2012      **University of Memphis – School of Public Health**  
 Memphis, TN  
 Ph.D. student in Social and Behavioral Science
- 2004 – 2006      **University of Wisconsin – La Crosse**  
 La Crosse, WI  
 Master of Public Health (MPH) in Community Health Education  
 Graduated: May 2006
- 2000 – 2004      **Ithaca College**  
 Ithaca, NY  
 Bachelor of Science (B.S.) in Health Education (Certified K-12)  
 Bachelor of Arts (B.A.) in Mathematics  
 Graduated Cum Laude: May 2004

**PROFESSIONAL POSITIONS**

- 2018 – Present      **Assistant Professor**  
 2022 – Present      **Director of MPH Program**  
 School of Public and Population Health  
 Boise State University – College of Health Sciences  
 Boise, ID
- 2016 – 2018      **Postdoctoral Fellow**  
 Department of Community and Family Health  
 Center of Excellence in Maternal and Child Health Education, Science, and Practice  
 University of South Florida College of Public Health, Tampa, FL
- 2012 – 2015      **Graduate Research Assistant**  
 Department of Community and Behavioral Health  
 University of Iowa College of Public Health, Iowa City, IA
- 2011 – 2012      **Graduate Research Assistant**  
 Department of Social and Behavioral Sciences  
 University of Memphis School of Public Health, Memphis, TN
- 2008 – 2011      **Assistant Director of Student Health for Health Promotion**  
 (Served in an interim capacity from September 2008 to September 2009)  
 Student Health Services Office of Health Promotion  
 University of Mississippi, University, MS

2008 – 2009	<b>Health Educator</b> Student Health Services Office of Health Promotion University of Mississippi, University, MS
2006 – 2008	<b>Health and Wellness Specialist</b> School Tobacco Policy Coordinator (K-12) Greater Southern Tier Board of Cooperative Educational Services (BOCES), Elmira, NY Position funded by: New York State Bureau of Tobacco Use Prevention and Control
2004 – 2006	<b>Graduate Assistant, Community Health Education</b> Department of Health Education & Health Promotion University of Wisconsin – La Crosse, La Crosse, WI

**CERTIFICATIONS**

2005 – Present	<b>Master Certified Health Education Specialist (MCHES #12475)</b> National Commission for Health Education Credentialing CHES examination date: October 2005 MCHES documentation acceptance date: April 2011
2004	<b>Public School Teacher Certificate</b> New York State Education Department Initial Certification, Health Education (K-12)

**GRANTS AND CONTRACTS**

**Evaluation of the Western Idaho Community Health Collaborative** (notfunded) \$84,711.00  
Boise State University (L. Smith), 04/04/22-11/30/22  
Central District Health  
Role: Co-PI

Purpose: Conduct an evaluation to measure the actual and potential impact of funding and supporting the Collective Impact structure adopted by the Western Idaho Community Health Collaborative to improve health in its 10-county region.

**Idaho Nutrition Data Needs Assessment Project** \$129,180.00  
Boise State University (L. Smith / Schafer), 06/15/22-04/30/23  
Idaho Department of Health and Welfare  
Role: PI (transferred from Lillian Smith)  
Purpose: Conduct a needs assessment, an evaluation, and identify resources for Idaho's SNAP-Ed nutrition education programs.

**Navigating Pathways to Resilience: A Developmental Evaluation of Impact of Supporting Family Caregivers on Key Social Determinants of Health** (notfunded) \$99,991.00  
Boise State University Center for the Study of Aging (Schafer), 01/01/22-12/31/22  
Blue Cross of Idaho Foundation  
Role: PI

Purpose: Expand the capacity to assess the impact of a family caregiver navigator intervention on social determinants of health and enhance evaluation activities related intervention participants' interaction with the health care system (social service and health care providers).

**Relatives as Parents Qualitative Needs Assessment: Impact of Substance Misuse on Family and Network Support Systems and Impact of Pandemic on Mental Health and Well-being** \$24,990.00  
Boise State University Center for the Study of Aging (Schafer), 02/08/21-06/30/21  
Office of Drug Policy – State of Idaho  
Role: PI

Purpose: Better understand the impact of substance misuse and addictions on individuals who are relatives as parents and the impact of the pandemic on the mental health and well-being of these family units. Findings will be used to fill gaps in person-centered educational materials and services needed to support this unique population of caregivers.

<b>Familial &amp; Community Infant Feeding Social Networks Among Low-Income WIC Mothers</b>	\$65,955.00
Boise State University (Schafer), 10/16/19-06/30/20 Mountain West CTR-IN (NIGMS, 2U54GM104944) Role: PI Purpose: Evaluate social networks of low-income (WIC) mothers in Idaho to identify potential intervention points to improve disparities in infant feeding outcomes. Uses quantitative data collection methods and social network analyses.	
<b>Contextualizing Mothers' Infant Feeding Environments: A Social Network Approach to Understanding Perspectives of Mothers and Their Network Members</b>	\$20,000.00
Boise State University (Schafer), 06/1/18-05/31/19 College of Health Sciences Dean's Office and Office of Research Role: PI Purpose: Increase understanding of the social context of mothers' infant feeding and care behaviors to inform interventions considering social support networks to improve infant feeding outcomes. Used a mixed methods and social network approach.	
<b>A Collaborative Teaching Strategy for Building Relationships in Maternal and Child Health</b>	\$3,000.00
University of South Florida (Schafer), 11/1/16-5/31/17 Association of Teachers of Maternal and Child Health Innovative Teaching in MCH Award Role: PI Purpose: Create a collaborative learning opportunity for students in the spring 2017 MCH II course at USF and leaders in the community (REACHUP, Inc., Champions for Children) to create a link between what we teach in class and what community partners are doing/need to be successful. Used Coffman's dual approach for advocacy.	
<b>Infant Feeding Intentions, Attitudes, and Subjective Norms among Adolescents</b>	\$967.05
University of South Florida (Schafer), 5/1/2016-4/30/2017 University of South Florida College of Public Health, Department of Community & Family Health Graduate Student/Post-Doctoral Fellow Research Award Role: PI Purpose: Explore adolescent infant feeding and care intentions, attitudes, perceived subjective norms, and social network characteristics. Used quantitative data collection methods (online) and social network analyses.	
<b>Infant Feeding Experiences in Iowa: From Breastfeeding Initiation to Cessation</b>	\$5,622.00
University of Iowa (Schafer), 1/23/2015-9/31/2015 University of Iowa Prevention Research Center for Rural Health (PRC-RH) Role: PI Purpose: Understand the role of breastfeeding experiences as underlying factors that may facilitate the maintenance of breastfeeding one's current child as well as the re-engagement in breastfeeding with subsequent children. Used a mixed methods approach.	
<b>Peer Health Educators</b>	\$8,000.00
University of Mississippi (Schafer), 4/1/2011-3/31/2012 University of Mississippi Ole Miss Parents Association Role: PI, Administrator Purpose: Provide health education programs to students on campus.	
<b>Peer Health Educators</b>	\$8,000.00
University of Mississippi (Schafer), 4/1/2010-3/31/2011 University of Mississippi Ole Miss Parents Association Role: PI, Administrator Purpose: Provide health education programs to students on campus.	
<b>Stay Dry! Mississippi Coalition of Partners in Prevention</b>	\$71,315.00
Mississippi State University (Yates), 10/1/2009-9/31/3011 United States Department of Education Grants for Coalitions to Prevent and Reduce Alcohol Abuse at Institutions of Higher Education Role: Co-I Purpose: Create a statewide coalition of college alcohol prevention educators to design, implement, and evaluate programming on campuses in Mississippi.	

**University of Mississippi Violence Prevention Program** \$299,986.00

University of Mississippi (Schafer), 10/1/2009 – 09/31/2012

United States Department of Justice – Office of Violence Against Women Grants to Reduce Domestic Violence, Dating Violence, Sexual Assault, and Stalking on Campus Programs

Role: PI

Purpose: Create a Violence Prevention Office and provide education and referral services regarding domestic violence, dating violence, sexual assault, and stalking on campus and in the community.

**Drug and Alcohol Programming** \$2,000.00

University of Mississippi (Schafer), 4/1/2009-3/31/2011

University of Mississippi Ole Miss Parents Association

Role: PI, Administrator

Purpose: Provide health education programs to students on campus.

**TEACHING EXPERIENCE****Boise State University****Instructor – MPH 500 Contemporary Foundations of Public Health**

In person 7 weeks, 2 credit hours, masters

**Instructor – MHS / MPH 502 Prevention and Intervention in Public Health Practice**

In person (2021: Remote synchronous) 15 weeks, 3 credit hours, masters

**Instructor – MHS 597 / MPH 550 / HLTH 497 Maternal Child Health**

In person (2020: Remote synchronous) 7 weeks, 2 credit hours, masters/undergraduate

**Instructor – MPH 514 Evaluating Prevention and Intervention Programs**

In person 7 weeks, 2 credit hours, masters

**Instructor – HEP 240 Foundations of Health Education and Promotion**

Online 15 weeks, 3 credit hours, undergraduate

**Instructor – PUBH 240 Foundations of Health Education and Promotion**

Online 7 weeks, 3 credit hours, undergraduate

**Instructor – HEP 344 Health Behavior Theory and Practice**

In person (2020: Remote synchronous) 15 weeks, 3 credit hours, undergraduate

**Instructor – PUBH 344 Health Behavior Theory and Practice**

Online 7 weeks, 3 credit hours, undergraduate

**Instructor – HLTH 419 Public Health Communications**

In person (2021: Remote synchronous) 15 weeks, 3 credit hours, undergraduate

**Guest Lecture – HLTH 110 Introduction to Health Science and Public Health**

"Introduction to Health Education and Health Promotion"

In person, undergraduate

**Earned: Basic Online Teaching Certificate** (spring 2022)

Certificate offered by eCampus; requires training in effective online teaching, student engagement, and other elective activities

**University of South Florida****Instructor – PHC 6532 Women's Health Issues in Public Health**

In person 15 weeks, 3 credit hours, masters

**Course Supervisor – HSC 4579 Foundations of Maternal & Child Health**

Online 15 weeks, 3 credit hours, undergraduate



**Instructor – PHC 6537 Maternal Child Health II: Programs, Policies, and Research**

In person 15 weeks, 3 credit hours, masters

**Guest Lecture – Theoretical & Behavioral Basis of Health Education**

“Theory of Reasoned Action, Theory of Planned Behavior, Integrated Behavioral Model”

In person, masters and doctoral

**Co-Instructor – PHC 7704 Applied Research Methods in Community and Family Health**

In person 15 weeks, 3 credit hours, doctoral

**Co-Instructor – PHC 6505 Program Planning Methods in Community Health**

In person 15 weeks, 3 credit hours, masters

**University of Iowa****Teaching Assistant – CBH 172 Introduction to Health Promotion and Disease Prevention**

In person and online 15 weeks, 3 credit hours, masters

Provided Guest Lecture, “Interpersonal Level Interventions”

**Guest Lecture – Introduction to Health Promotion and Disease Prevention**

“Social Marketing, Media, and Public Health”

Online, masters

**University of Mississippi****Co-Instructor – EDHE 105 First Year Experience**

In person 15 weeks, 3 credit hours, undergraduate

**MENTORING EXPERIENCE**

2022-ongoing	<b>Sanzida Afrin</b> – Boise State University Master of Public Health student GRA supervisor
2022-ongoing	<b>Macy Jordan</b> – Boise State University Master of Public Health student GRA supervisor
2021-ongoing	<b>Matea Bidaburu</b> – Boise State University Master of Public Health student GRA supervisor, Thesis chair Title: Exploring information and support needs through TikTok for people with polycystic ovary syndrome
2021-ongoing	<b>Zizly Quiroz</b> – Boise State University Communications master’s student Member of supervisory committee Title: Familia Saludable – Mente Saludable
2021-2022	<b>Katy Hafezi</b> – Boise State University Genetic Counseling master’s student Member of capstone project committee Title: Evaluating education videos available from Huntington’s Disease Society of America for support group leaders
2021-2022	<b>Edwina Wallen</b> – Boise State University Master of Public Health student GRA supervisor
2021	<b>Sabrina Allison</b> – Boise State University Honors College student Honors-H research in HLTH 497
2021	<b>Alyssa Romero</b> – Boise State University Honors College student Honors-H research in HLTH 419

- 2020-2021      **Josie Minick** – Boise State University Genetic Counseling master’s student  
Member of capstone project committee  
Title: Assessing COVID-19 impact on Huntington’s disease support groups
- 2020-2022      **Ashtin Glodt** – Boise State University Master of Public Health student  
Thesis chair  
Title: Normalization of virtual home visiting in Idaho
- 2019-2021      **Brooke Ambrose** – Boise State University Master of Public Health student  
Thesis chair, GRA supervisor, IPHA internship supervisor  
Title: Relationships between intimate partner violence, pregnancy, maternal mental health, and infant care behaviors
- 2019-2021      **Abbigail Lee** – University of Iowa College of Public Health PhD student  
Professional Alumni Mentor
- 2018-2021      **Regina M. Roig-Romero** – University of South Florida College of Public Health PhD student  
Member of Doctoral Dissertation Committee  
Title: Psychometric evaluation of perceived milk insufficiency scales in a low-income population
- 2019-2020      **Ann Wozniak** – Boise State University Ecology, Evolution, and Behavior PhD student  
Member of PhD Supervisory Committee
- 2019-2020      **Sydney Pulsipher** – Boise State University Master of Public Health student  
GRA supervisor
- 2019-2020      **Guadalupe Serrano** – Boise State University undergraduate Health Science student  
RA supervisor
- 2019              **Kajsa Roberts** – Boise State University BAPH student  
TA supervisor
- 2019              **Emily Oe** – Boise State University Honors College student  
Honors-H research
- 2018-2019      **Sydney Nickel** – Boise State University undergraduate Public Health student  
Research volunteer supervisor
- 2018-2019      **Marie Letourneau** – Boise State University Master of Educational Technology student  
GRA supervisor
- 2018-2019      **Kayla Downs** – Boise State University Master of Science in Anthropology student  
Member of Thesis Committee  
Title: Effects of intention status and social support on parental investment
- 2018              **Alexis Pickering** – Boise State University Master of Health Science student  
Member of Thesis Committee  
Title: Idaho WICSmart: Process and implementation evaluation
- 2016-2017      **My-Phuong (Maria) Huynh** – University of South Florida Center of Excellence in Maternal and Child Health Scholar (MPH student with Maternal and Child Health/Epidemiology focus)

**PEER REVIEWED MANUSCRIPTS AND PUBLICATIONS**

Student co-authors are underlined, community partner co-authors are *italicized*

Roig-Romero, R., Livingston, T., Schafer, E. J., Reyes Martinez, E., *Wachira, M.*, Marhefka, S. (2022). The state of our breastfeeding friendly childcare programs: Ten years after the 2011 Surgeon General’s Call to Action to Support Breastfeeding. *Journal of Human Lactation*, 38(3), 477-486.

- Louis-Jacques, A., **Schafer, E.**, Livingston, T., Logan, R., Marhefka, S. (2021). Modesty and Security: Attributes associated with comfort and willingness to engage in telelactation. *Children*, 8(4), 271.
- Woods Barr, A. L., *Austin, D. A.*, Smith, J. L., **Schafer, E. J.** (2021). "...[T]his is what we are missing": The value of communicating infant feeding information across three generations of African-American women. *Journal of Human Lactation*, 37(2), 279-288.
- Woods Barr, A. L., Miller, E., Smith, J. L., *Bartlett-Cummings, S.*, **Schafer, E. J.** (2021). #EveryGenerationMatters: Intergenerational perceptions of infant feeding information and communication among African-American women. *Breastfeeding Medicine*, 16(2), 131-139.
- Schafer, E. J.**, Livingston, T., Roig-Romero, R., *Wachira, M.*, Louis-Jacques, A., Marhefka, S. (2021). "Breast is best, but...": According to childcare administrators, not best for the childcare environment. *Breastfeeding Medicine*, 16(1), 21-28.
- Louis-Jacques, A. F., Brumley, J., Miller, E. M., Taylor, T. I., **Schafer, E. J.**, Brown, A., Spatz, D. L., Marhefka, S. L. (2020). Historical antecedents of breastfeeding for African American women: From colonial period to the mid-20<sup>th</sup> century. *Journal of Racial and Ethnic Health Disparities*, 7(5), 1003-1012.
- Marhefka, S., Sharma, V., **Schafer, E. J.**, Turner, D., Falope, O., Louis-Jacques, A., *Wachira, M.*, Livingston, T., Roig-Romero, R. M. (2019). "Why do we need a policy?" Administrators' perceptions on breastfeeding friendly childcare. *Public Health Nutrition*, 22(3), 553-563.
- Schafer, E. J.**, Buch, E., Campo, S., Ashida, S. (2019). From initiation to cessation: Turning points and coping resources in the breastfeeding experience of first-time mothers. *Women & Health*, 59(4), 449-463.
- Schafer, E. J.**, Ashida, S., Palmquist, A. E. L. (2018). Psychosocial dimensions of human milk sharing. *Maternal & Child Nutrition*, 14(S6). DOI: 10.1111/mcn.12606.
- Ashida, S., Sewell, D. K., **Schafer, E. J.**, Schroer, A., Friberg, J. (2018). Social network members who engage in activities with older adults: Do they bring more social benefits than other members? *Ageing & Society*, 39(5), 1050-1069.
- Schafer, E. J.**, Campo, S., Colaizy, T., Mulder, P., Brenheny, P., Ashida, S. (2017). First-time mothers' breastfeeding maintenance: Role of experiences and changes in maternal perceptions. *Public Health Nutrition*, 20(17), 3099-3108.
- Walker, K. K., **Schafer, E. J.**, Maziarz, K., Binder, M., Quichocho, D. (2017). Assessing community support for comprehensive sexual health education in high-risk Florida schools. *Florida Public Health Review*, 14, 99-109.
- Schafer, E. J.**, Campo, S., Colaizy, T., Mulder, P., Ashida, S. (2017). Influence of experiences and perceptions related to breastfeeding one's first child on breastfeeding initiation of second child. *Maternal & Child Health Journal*, 21(6), 1288-1296.
- Schwab-Reese, L. M., **Schafer, E. J.**, Ashida, S. (2017). Associations of social support and stress with postpartum maternal mental health status: Main effects, moderation, and mediation. *Women & Health*, 57(6), 723-740.
- Ashida, S., Lynn, F., Williams, N., **Schafer, E.** (2016). Competing infant feeding information in mothers' networks: Advice that supports v. undermines clinical recommendations. *Public Health Nutrition*, 19(7), 1200-1210.
- Schafer, E. J.**, Williams, N. A., Digney, S., Hare, M. E., Ashida, S. (2016). Social contexts of infant feeding and infant feeding decisions. *Journal of Human Lactation*, 32(1), 132-140.
- Ashida, S., **Schafer, E. J.** (2015). Family health information sharing among older adults: Reaching more family members. *Journal of Community Genetics*, 6(1), 17-27.
- Koehly, L. M., Ashida, S., **Schafer, E. J.**, Ludden, A. (2015). Caregiving networks – Using a network approach to identify missed opportunities. *The Journals of Gerontology. Series B, Psychological Sciences and Social Sciences*, 70(1), 143-154.

Ashida, S., Kaphingst, K., Goodman, M., **Schafer, E.** (2013) Family health history communication networks of older adults: Importance of social relationships and disease perceptions. *Health Education and Behavior*, 40(5), 612-619.

### **MANUSCRIPTS IN PROGRESS**

Wallen, E., Woodward, T., Toevs, S., **Schafer, E. J.** (plan to submit in 2022). "Hey, you wanna take this kid forever?": Impact of substance use disorder on Relative As Parent families in Idaho.

Ambrose, B., Smith, M., Lasich, N., **Schafer, E. J.** (plan to submit in 2022). Relationship between experiencing intimate partner violence and breastfeeding behaviors.

**Schafer, E. J.**, Bidaburu, M., Lyons, J. (writing in 2022). Perceptions of the COVID-19 pandemic: Role of party and partisanship.

### **BOOK CHAPTERS**

Ashida, S. & **Schafer, E.** (2018). Social Networks, Social Relationships, and the Aging Mind and Brain. In M. Rizzo & S. Anderson (Eds.), *The Wiley Handbook on the Aging Mind and Brain* (pp. 19-36). Hoboken, NJ: John Wiley & Sons, Inc.

**Schafer, E.** & Cromeans, E. (2012). Sex and Sexual Health. In L. Banahan (Ed.), *The Ole Miss Experience: First Year Experience Text for EDHE 105* (pp. 297-304). Taylor, MS: Nautilus Publishing Company.

**Schafer, E.**, Cromeans, E., & Fisher, A. (2012). Alcohol and Other Drugs: Use and Abuse. In L. Banahan (Ed.), *The Ole Miss Experience: First Year Experience Text for EDHE 105* (pp. 305-320). Taylor, MS: Nautilus Publishing Company.

**Schafer, E.** (2011). Sex and Sexual Health. In L. Banahan (Ed.), *The Ole Miss Experience: First Year Experience Text for EDHE 105* (pp. 333-340). Taylor, MS: Nautilus Publishing Company.

**Schafer, E.** & Fisher, A. (2011). Alcohol and Other Drugs: Use and Abuse. In L. Banahan (Ed.), *The Ole Miss Experience: First Year Experience Text for EDHE 105* (pp. 341-358). Taylor, MS: Nautilus Publishing Company.

### **INVITED PRESENTATIONS**

**Schafer, E.**, & Toevs, S. (July 2019). *Public health and community engagement*. Mandela Washington Fellowship Program, Boise State University, Boise, ID.

**Schafer, E.** (November 2017). *Professional relationships in MCH*. Association of Teachers of Maternal and Child Health Annual Assembly, Atlanta, GA.

**Schafer, E.** (September 2017). *Exploration of new mothers' social networks and key relationship characteristics associated with infant feeding*. USF Perinatal Research Seminar, Tampa, FL.

**Schafer, E.** (September 2016). *Who do low-income, urban mothers perceive as providing current infant feeding recommendations?* Department of Community and Family Health Research Seminar (USF), Tampa, FL.

**Schafer, E.** (March 2016). *Intrapersonal and Interpersonal Factors Influencing Infant Feeding Behaviors and Outcomes*. Department of Community and Family Health Research Seminar (USF), Tampa, FL.

Ashida, S., Green, R., Roberts, J. S., Chen, C., Hiraki, S., **Schafer, E.**, Koehly, L. (January 2014). *Alzheimer's Disease and Affected Families: Impact of Genetic Information and Caregiving Processes*. National Human Genome Research Institute's Social and Behavioral Research Branch Scientific Symposium 10 Year Celebration in Bethesda, MD.

**Schafer, E.**, & Fisher, A. (February 2012) *Collegiate Recovery Communities (CRCs): What are they and why do they matter?* Annual Mississippi Addiction Professionals Conference in Jackson, MS.

**Schafer, E.**, Murphy, E., & Woodyard, C. (January 2009). *Drinking on College Campuses*. Mississippi State Department of Mental Health School for Addiction Professionals in Hattiesburg, MS.

**Schafer, E.**, Reardon, T., & Carlson, M. P. (recurring summer 2009). *Reality Check*. Orientation session for incoming freshmen and parents at the University of Mississippi in Oxford, MS.

**Schafer, E.** (January 2005). *Disease*. Undergraduate health promotion lecture series at the University of Wisconsin – La Crosse in La Crosse, WI.

**Schafer, E.** & Gilmore, G. (recurring 2004-2005). *Addressing the Storm Within and Without: Violence and Abuse Prevention*. Undergraduate health promotion lecture series at the University of Wisconsin – La Crosse in La Crosse, WI.

### **PEER-REVIEWED PRESENTATIONS**

Student co-authors are underlined and community partner co-authors are *italicized*.

#### ***Oral & Roundtable Presentations***

Wallen, E., Mullen, K., Toeve, S., **Schafer, E.** (abstract submitted in April 2022). *Impact of substance use disorder on relative as parent families in Idaho*. American Public Health Association's 150<sup>th</sup> annual meeting, Boston, MA.

**Schafer, E.**, Lyons, J. (October 2021). *Perceptions of the COVID-19 pandemic: Role of party and partisanship*. American Public Health Association's 149<sup>th</sup> annual meeting, Denver, CO. (virtual)

Spear, C., Dexter, J. **Schafer, E.**, Smith, L. (October 2020). *Struggling with basic needs: Student voices provide a foundation for collective impact strategies*. American Public Health Association's 148<sup>th</sup> annual meeting, San Francisco, CA. (virtual)

Spear, C., **Schafer, E. J.**, Dexter, J. (March 2020). *Using stories of student food insecurity to support and advocate for change on a college campus*. Society for Public Health Education Annual Conference 2020, Atlanta, GA. (virtual)

**Schafer, E.**, Livingston, T., Roig-Romero, R., Wachira, M., Marhefka, S. (March 2019). *Facilitators and barriers to implementing the Breastfeeding Friendly Child Care Initiative in Florida*. Breastfeeding and Feminism International Conference 2019, Chapel Hill, NC.

**Schafer, E.**, Roig-Romero, R., Barr, A., Livingston, T., Marhefka, S. L. (November 2018). *Adding cereal to the bottle to "make the baby full": Priority populations and modifiable factors*. American Public Health Association's 146<sup>th</sup> annual meeting, San Diego, CA.

Barr, A., Livingston, T., **Schafer, E.**, Roig-Romero, R., Wachira, M., Marhefka, S. (November 2018). *Promoting and supporting breastfeeding in the hospital: Factors associated with breastfeeding cessation at one month among WIC participants*. American Public Health Association's 146<sup>th</sup> annual meeting, San Diego, CA.

Roig-Romero, R., **Schafer, E.**, Barr, A., Wang, W., Livingston, T., Marhefka, S. L. (November 2018). *Supplementation and weaning at 1-month postpartum due to perceived milk insufficiency: Risk factors for WIC participants*. American Public Health Association's 146<sup>th</sup> annual meeting, San Diego, CA.

Roig-Romero, R., **Schafer, E.**, Barr, A., Wang, W., Livingston, T., Marhefka, S. L. (November 2018). *Perceived milk insufficiency among WIC participants at 3 months postpartum: Intersection of physical and social support factors*. American Public Health Association's 146<sup>th</sup> annual meeting, San Diego, CA.

**Schafer, E.**, Barr, A., Huynh, M., Thompson, E. L., Sharma, V., Roig-Romero, R., Daley, E., Marhefka, S. L. (November 2017). *Feeding infants cereal and solid foods: Factors associated from birth to 4 months*. American Public Health Association's 145<sup>th</sup> annual meeting, Atlanta, GA.

Marhefka, S., Sharma, V., **Schafer, E.**, Logan, R., Brumley, J., Louis-Jacques, A. (April 2017). *Breastfeeding friendly childcare designation: Perceptions from center administrators and staff in the Tampa Bay Area*. 2017 Florida Breastfeeding Coalition Conference, St. Petersburg, FL.

- Schafer, E. J., Barr, A. L.,** Thompson, E., Huynh, M., Sharma, V., Daley, E. M., Marhefka, S. L. (February 2017). *Factors associated with the early introduction of cereal and solid foods among infants aged birth to 4 months.* USF Health Research Day 2017, Tampa, FL.
- Schafer, E.,** Buch, E., Campo, S., Ashida, A. (November 2016). *Exploring Turning Points in the Breastfeeding Experience of New Moms.* Round table presentation for the American Public Health Association's 144<sup>th</sup> annual meeting, Denver, CO.
- Schafer, E.,** Campo, S., Colaizy, T., Mulder, P., Ashida, S. (November 2016). *Factors facilitating breastfeeding maintenance among first-time mothers and initiation among second-time mothers.* American Public Health Association's 144<sup>th</sup> annual meeting, Denver, CO.
- Marhefka, S. L., Logan, R., Turner, D., Sharma, V., Schafer, E., Louis-Jacques, A., Brumley, J. (November 2016). *iBreastfeed: Mom's willingness to receive technology-augmented lactation consultation.* American Public Health Association's 144<sup>th</sup> annual meeting, Denver, CO.
- Schafer, E.,** Williams, N., Ashida, S. (November 2015). *Who do low-income, urban mothers perceive as providing current infant feeding recommendations?* American Public Health Association's 143<sup>rd</sup> annual meeting, Chicago, IL.
- Ashida, S., Lynn, F., Williams, N., **Schafer, E.** (November 2015). *Infant feeding information within mothers' social networks: What is the effect of advice that is consistent with versus inconsistent with clinical recommendations?* American Public Health Association's 143<sup>rd</sup> annual meeting, Chicago, IL.
- Schafer, E.,** Friberg, J., Schroer, A., Robinson, E., Slagel, L., Ashida, S. (April 2015). *Families aren't able to see their loved ones on a daily basis: Social networks and relationships of older residents in Ottumwa, IA.* Iowa Governor's Conference on Public Health, Cedar Rapids, IA.
- Schafer, E.,** Williams, N., Digney, S., Ashida, A. (November 2014). *Relationship Characteristics Associated with Breastfeeding Encouragement within Support Networks of Low-Income New Mothers.* American Public Health Association's 142<sup>nd</sup> annual meeting, New Orleans, LA.
- Ashida, S., **Schafer, E.,** Marcum, C., Koehly, L. (November 2013). *Family Participation in Alzheimer's Caregiving and Self-Reported Health Status of Family Members.* Gerontological Society of America's 66<sup>th</sup> annual meeting in New Orleans, LA.
- Ashida, S., **Schafer, E. J.,** Collins, A. C., Amoah, D. K. (April 2012) *Family Health History Communication Networks of Older Adults in Memphis, TN.* Southern Gerontology Society's 33<sup>rd</sup> annual meeting in Nashville, TN.
- Schafer, E.,** & Ashida, S., (April 2012) *Family Health History Communication: With whom do older adults share their health lyrics?* Society for Public Health Education's Midyear Scientific Conference in Nashville, TN.
- Schafer, E.,** Doyle, B., & Jacobs, J. (November 2003) *A Needs Assessment Survey Report of Current Student Smoking Behaviors at Ithaca College.* New York State Association of Health, Physical Education, Recreation, and Dance conference in Buffalo, NY.
- Schafer, E.** & Stephens, Y. (November 2003) *Targeting Interdisciplinary Connections Through A "Health-Matics How To Manual".* New York State Association of Health, Physical Education, Recreation, and Dance conference in Buffalo, NY.

#### **Poster Presentations**

- Glodt, A., Begic, S., Toevs, S., **Schafer, E.** (November 2022). *Normalization of virtual home visiting in Idaho.* American Public Health Association's 150<sup>th</sup> annual meeting, Boston, MA.
- Ashida, S., **Schafer, E.,** Thompson, L. (November 2021). *Social roles of family and friends differ in social networks of older adults who live alone.* The Gerontological Society of America annual meeting, online.
- Schafer, E.,** Ambrose, B., Lyons, J., Weaver, J. (October 2021). *"The support I need is more important than the potential risk": Mothers' pandemic-related stress and coping.* American Public Health Association's 149<sup>th</sup> annual meeting, Denver, CO. (virtual)

- Schafer, E., Mullen, K., Waselewski, B.,** Ashida, A., Toevs, S. (October 2021). *“What relationships? Now they’re just gone”*: Relative as parent caregiving during a pandemic. American Public Health Association’s 149<sup>th</sup> annual meeting, Denver, CO. (virtual)
- Ambrose, B.,** Smith, M., Lasich, N., **Schafer, E.** (October 2021). *Relationship between maternal experience of IPV and breastfeeding outcomes*. American Public Health Association’s 149<sup>th</sup> annual meeting, Denver, CO. (virtual)
- Cariou, C., Schafer, E., Aanensen, J., Colby, C.,** Lindsay, R., Lung, J., Fouts, T. (October 2020). *Networking and knowledge – a nontraditional approach to public health affiliate engagement*. American Public Health Association’s 148<sup>th</sup> annual meeting, San Francisco, CA. (virtual)
- Turner, D., Logan, R., Vadlamani, P., Schafer, E.,** Marhefka, S. (November 2017). *Gaining control of sexual health: Knowledge of biomedical approaches for pregnancy and HIV prevention among college students*. Poster for the American Public Health Association’s 145<sup>th</sup> annual meeting, Atlanta, GA.
- Marhefka, S., Hernandez, I., Logan, R., Louis-Jacques, A., Schafer, E., Roig-Romero, R., Barr, A., Bronson, E.,** Detman, L., Sappenfield, W. (November 2017). *Getting the best medicine to vulnerable infants: Findings from a nurse training program for incorporating mothers’ own milk into Neonatal Intensive Care settings*. Poster for the American Public Health Association’s 145<sup>th</sup> annual meeting, Atlanta, GA.
- Ashida, S., Sewell, D., Schafer, E., Schroer, A., Friberg, J.** (July 2017). *Social network functions related to co-engagement in social activity and psychological well-being*. Poster for the International Association of Gerontology and Geriatrics 21<sup>st</sup> World Congress, San Francisco, CA.
- Woods-Barr, A., Schafer, E., Sharma, V.,** Thompson, E., Daley, E., Marhefka, S. (February 2017). *Social Influence of Grandmothers on Breastfeeding Duration*. Poster for USF Health Research Day 2017, Tampa, FL.
- Schafer, E.,** Louis-Jacques, A., **Logan, R., Sharma, V.,** Brumley, J., Marhefka, S. (October 2016). *Conditional acceptance: Support vs. tolerance for breastfeeding at childcare centers*. Poster for the Academy of Breastfeeding Medicine’s 21<sup>st</sup> annual international meeting, Washington, D.C.
- Louis-Jacques, A., Sharma, V., Falope, O., Schafer, E., Logan, R.,** Brumley, J., Marhefka, S. (October 2016). *The Consolidated Framework for Implementation Research (CFIR): A tool to assess potential fit of the Florida Breastfeeding Friendly Childcare Initiative*. Poster for the Academy of Breastfeeding Medicine’s 21<sup>st</sup> annual international meeting, Washington, D.C.
- Marhefka, S., Logan, R., Schafer, E., Sharma, V.,** Brumley, J., Louis-Jacques, A. (October 2016). *“Uncovering” the truth about technology-based breastfeeding support: Barriers to videochat lactation-consultation (VCLC) uptake*. Poster for the Academy of Breastfeeding Medicine’s 21<sup>st</sup> annual international meeting, Washington, D.C.
- Schafer, E.,** Palmquist, A., Ashida, S. (November 2016). *Receiving human milk via online milk sharing networks: Role of stigma, screening, and social support in emotional response*. Poster for the American Public Health Association’s 144<sup>th</sup> annual meeting, Denver, CO.
- Marhefka, S. L., Sharma, V., Turner, D., Logan, R., Schafer, E.,** Brumley, J., Louis-Jacques, A. (November 2016). *Breastfeeding friendly child care initiative in Florida: Administrators’ perspectives*. Poster for the American Public Health Association’s 144<sup>th</sup> annual meeting, Denver, CO.
- Sharma, V., Graske, T., Turner, D., Logan, R., Schafer, E.,** Brumley, J., Louis-Jacques, A., Marhefka, S. L. (November 2016). *Breastfeeding knowledge and attitudes among childcare workers in the Tampa Bay area: Opportunities for intervention*. Poster for the American Public Health Association’s 144<sup>th</sup> annual meeting, Denver, CO.
- Friberg, J.,** Baquero, B., **Schafer, E., Schroer, A., Slagel, L., Arneson, E.,** Ashida, S. (November 2015). *Social support networks and vegetable consumption of older adults in rural Iowa: Who do they eat with and who encourages healthy eating?* Poster for the American Public Health Association’s 143<sup>rd</sup> annual meeting, Chicago, IL.
- Robinson, E., Slagel, L.,** Ramirez, M., **Schafer, E., Schroer, A., Friberg, J.,** Ashida, S. (April 2015). *“Because I don’t want to think about it”: Disaster preparedness perceptions and behaviors amongst older adults in eastern Iowa*. Poster for the Iowa Governor’s Conference on Public Health, Cedar Rapids, IA.

- Ashida, S., Robinson, E., **Schafer, E.**, Rook, E., Ramirez, M. (November 2014). *Using Extended Parallel Process Model to Guide the Development of a Tool to Assist Community-Dwelling Older Adults in Rural Areas Prepare for Disasters*. Poster for the American Public Health Association's 142<sup>nd</sup> annual meeting, New Orleans, LA.
- Schafer, E.**, Williams, N., Digney, S., Ashida, A. (March 2014). *Social Influence and Initiation of Breastfeeding Among Low-income Urban Mothers*. Poster for Society for Public Health Education's 65<sup>th</sup> annual meeting, Baltimore, MD.
- Ashida, S., **Schafer, E.** (November 2013). *Reach of Family Health Information Within Familial Social Networks of Older Adults: The Importance of Role Modeling*. Poster for the American Public Health Association's 141<sup>st</sup> annual meeting, Boston, MA.
- Hankey, M., Williams, N., **Schafer, E.**, Digney, S. & Ashida, S. (April 2013). *Feeding Practices of Low Income Urban Mothers: Do Beliefs About Childhood Obesity Play a Role?* Poster for the National Conference in Pediatric Psychology, New Orleans, LA.
- Ashida S., **Schafer, E.** (November 2012) *Health Communication Networks of Older Adults: Willingness to Share Family Health History*. Poster for the Gerontological Society of America's 65<sup>th</sup> annual meeting in San Diego, CA.
- Ashida S., **Schafer, E.**, Kaphingst K., Goodman M., Webb, L. (October 2012) *Family Health History Communication Patterns Among Older Adults: Importance of Perceptions and Disease Experience*. Poster for the American Public Health Association's 139<sup>th</sup> annual meeting in San Francisco, CA.
- Schafer, E.** & Stephens, Y. (October 2003) *Targeting Interdisciplinary Connections Through A "Health-Matics How To Manual"*. Poster for the American School Health Association conference in El Paso, TX.

### **AWARDS**

- August 2022      **Journal of Human Lactation Miriam Labbok New Investigator Award**  
Co-authored a paper with new investigator, Alexis Woods Barr, PhD, titled "...[T]his is what we are missing": *The value of communicating infant feeding information across three generations of African American women* that won the new investigator award for making a significant contribution to the body of lactation knowledge.
- April 2021      **Delta Omega Honorary Society in Public Health – Alpha Phi Chapter**  
Inducted into the University of Iowa College of Public Health Alpha Phi Chapter of Delta Omega
- Jan-Dec 2020      **ASSERT (Aligning Stakeholders and Structures to Enable Research Transformation)**  
Joined community of scholars to support faculty in drive and ability to perform impactful research  
Funded by: Offices of the Provost and Vice President for Research and Economic Development
- Mar-Dec 2018      **College of Health Sciences External Funding Proposal Development Fellowship**  
Competitive fellowship awarded to support research development activities at Boise State University  
Awarded by: Boise State University College of Health Sciences Office of Research
- May 2015      **Post-Comprehensive Summer Research Award**  
Competitive summer fellowship funding to conduct dissertation research  
Awarded by: University of Iowa Graduate College
- March 2014      **Travel Award**  
Competitive funding to present at the SOPHE conference in Baltimore, MD  
Awarded by: SOPHE 21<sup>st</sup> Century Student Scholarship
- January 2014      **Fellow – Obermann Institute on Engagement in the Academy**  
Selected to participate in the week-long Institute and named as a fellow  
Awarded by: University of Iowa Obermann Center for Advanced Studies
- April 2005      **Barbara A. Cooley Masters Scholarship**  
Awarded by: American Association of Health Education, Chicago, IL



- May 2004                    **Professional Excellence Award, Department Senior Honors**  
Health Education – Teaching  
Awarded by: Dean and faculty of the Department of Health Promotion and Human Movement,  
Ithaca College
- April 2004                    **Pi Mu Epsilon (Mathematics Honor Society)**  
New York State Upsilon Chapter, Ithaca College

**PROFESSIONAL MEMBERSHIPS****Idaho Public Health Association (IPHA)****Association of Teachers of Maternal and Child Health (ATMCH)****American Association for the Advancement of Science (AAAS)****American Public Health Association (APHA)****Society for Public Health Education (SOPHE)****PROFESSIONAL SERVICE**

- 2022-Present                **Journal of School Health**  
Provide blinded peer review
- 2021-Present                **Women's Health Issues**  
Provide blinded peer review
- 2019-Present                **Public Health Nutrition**  
Provide blinded peer review
- 2018-Present                **Children**  
Provide peer review
- 2016-Present                **Journal of Human Lactation**  
Provide blinded peer review
- 2014                            **SOPHE**  
Served as a 21<sup>st</sup> Century Student Scholar
- 2011-Present                **APHA**  
Serve as a conference abstract reviewer and help to determine eligibility for CHES and MCHES  
continuing education credit hours

**UNIVERSITY & COMMUNITY SERVICE****Boise State University**

- 2022-Present                **School of Public and Population Health Curriculum Committee**  
Participate as a member of the school's curriculum committee
- 2022-Present                **School of Public and Population Health Graduate Program Champions**  
Co-chair of Graduate Program Champions special interest group
- 2021-2022                    **Department of Public Health and Population Science Undergraduate Curriculum  
Committee** – Participate as a member of the department's curriculum committee
- 2021-2022                    **Faculty Search Committee**  
Participated in the search for two PHPS faculty positions

2019-Present	<b>Commencement Faculty Volunteer</b> Assist with the winter commencement ceremony as a faculty volunteer
2019-Present	<b>Graduate College</b> Judged graduate student poster presentations at the Graduate Student Showcase
2018-2021	<b>Department of Community &amp; Environmental Health Graduate Program Committee</b> Participated as a member of the department's graduate program committee
2018-2020	<b>Department of Community &amp; Environmental Health Faculty Affairs Committee</b> Participated as a member of the department's faculty affairs committee
2018-Present	<b>Department of Community &amp; Environmental Health Advisory Board</b> Worked to initiate Advisory Board and participate as a faculty member
2018- Present	<b>Faculty Advisor: Eta Sigma Gamma</b> Faculty advisor for student organization – Health Education Honorary *Nominated for Student Organization Advisor of the Year in 2021 and 2022
2018	<b>School of Allied Health Sciences Promotion &amp; Tenure Committee</b> Participated as a member of the School-level Promotion and Tenure Committee; reviewed and voted on application packages
2018	<b>Department of Community &amp; Environmental Health Curriculum Crew</b> Participated as a member of the department curriculum committee – sub-committees: Evaluation, Accreditation, and Advisory Board
<b>Community - Idaho</b>	
2019-Present	<b>Idaho Public Health Association</b> Board of Directors, currently serving as Board Secretary
2018-Present	<b>Treasure Valley Breastfeeding Coalition</b> Member
2018-Present	<b>Idaho Breastfeeding Coalition</b> Member
<b>University of South Florida</b>	
2016-2017	<b>Department of Community and Family Health Curriculum Committee</b> Participated as a non-voting member of the department curriculum committee
2016-2017	<b>Department of Community and Family Health Research Committee</b> Participated as a non-voting member of the department research committee
2016-2017	<b>Translational Research in MCH Seminar Series</b> Co-coordinated monthly translational research seminar series on a variety of maternal and child health issues
<b>University of Iowa</b>	
2013	<b>Department of Community and Behavioral Health – Faculty Search Committee</b> Participated as a student member of the search committee

**University of Mississippi**

- 2009 – 2012      **UM Recovery Community – Advisory Board Member**  
Participated as a faculty/staff/community advisory committee member for the collegiate recovery community
- 2009 – 2011      **Chancellor’s Commission on the Status of Women – Commission Member**  
Worked with approximately 20 faculty/staff/students appointed by the Chancellor and charged with the duty of studying the status of women faculty, staff, and students.
- 2009 – 2011      **Internship/Practicum Site Supervisor**  
Supervised master’s level students in practicum experiences including piloting a weight management program, implementing violence against women awareness/advocacy events, and conducting a sexual health needs assessment for first year students living in campus housing.
- 2009 – 2011      **Ole Miss ALLIES – Trained Advocate**  
Helped to develop and maintain a safe environment and network of informed faculty/staff willing to be visibly supportive of students identifying as gay, lesbian, bisexual, or transgender.
- 2008-2009      **Honors Thesis Review**  
Content expert for the preparation and review of honors thesis presented by KL Gilham, “Como Cuidar su Corazon: A heart health pilot program targeting Latinos in north Mississippi”.
- 2008 – 2009      **Sexual Assault and Relationship Violence Task Force – Chair**  
Chaired the Sexual Assault and Relationship Violence Task Force and prepared a comprehensive plan outlining policy changes and implementation recommendations for University officials.
- 2009      **2009 Isom Student Gender Conference**  
Moderated the panel “Activism in Women’s Health”

**Vinita Sharma, PhD, MPH, CPH, CHES**

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**CURRENT POSITION**

06/2022-Present     **Assistant Professor (Tenure-track)**  
 School of Public and Population Health. Boise State University

**EDUCATION**

2014-2019	PhD	University of South Florida College of Public Health <b>Dissertation:</b> Risk and resilience pertaining to mental health of youths attending a college in Kathmandu who were exposed to the 2015 earthquakes during their adolescence: A mixed method study
2014-2016	Graduate certificate	University of South Florida Institute for Translational Research in Adolescent Behavioral Health <b>Service-learning project:</b> Getting ready for tomorrow: A mixed methods evaluation of readiness towards implementation of evidence-based practice
2010-2011	Master of Public Health	The Hebrew University of Jerusalem International MPH Program <b>Thesis:</b> Association between gender and knowledge of HIV and AIDS among Nepalese population
2005-2009	Bachelor of Public Health	Pokhara University <b>Thesis:</b> Comparative study on quality of life and coping strategies of opioid dependent persons on methadone maintenance treatment in Nepal

**PROFESSIONAL APPOINTMENTS****Postdoctoral**

06/2020-05/2022     **NIDA Ruth L. Kirschstein National Research Service T32 Postdoctoral Fellow**  
 Department of Epidemiology, College of Public Health and Health Professions and College of Medicine. University of Florida

**Teaching**

Fall 2022     **Assistant Professor**  
 HEP240 Foundations of Health Education and Promotion (undergraduate). School of Public and Population Health, Boise State University.

Fall 2019	<p><b>Adjunct Lecturer</b> CPH4105:0001 Introduction to Health Promotion and Disease Prevention (graduate level). Department of Community and Behavioral Health, College of Public Health, The University of Iowa</p> <p><b>Instructor of Record (responsible for planning and delivery of the course)</b></p>
Spring 2019, Fall 2018	HSC4579.310F18 Foundations of Maternal & Child Health (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Fall 2018	HSC4464.311F18 Introduction to Health Disparities (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Spring 2019, Summer 2018, Spring 2018	HSC2130.003S18 Sex, Health and Decision-Making (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Summer 2018, Spring 2018	HSC4211.311S18 Health, Behavior, and Society (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Summer 2017, Fall 2016, Summer 2016	HSC4579.310U16 Foundations of Maternal & Child Health (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
	<b>Teaching Associate (assisted in planning and delivery of the course)</b>
Summer 2018	HSC4211.311S18 Health, Behavior, and Society (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Fall 2017	HUN 2201 Nutrition (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Fall 2017	HSC4172 Women's Health: A Public Health Perspective (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Spring 2017, Spring 2016	HSC 4579 Foundations of Maternal & Child Health (undergraduate level). Department of Community and Family Health, College of Public Health, University of South Florida
Summer 2015, Fall 2015	PHC 6410 Social and Behavioral Sciences Applied to Health (graduate level). Department of Community and Family Health, College of Public Health, University of South Florida
	<b>Single lecture that is a part of curriculum with course credit</b>
Spring 2016	HSC2130 Sex, Health and Decision Making (undergraduate level): Department of Community and Family Health, College of Public Health, University of South Florida. <i>Adolescent sex behaviors</i>

Fall 2016	HSC2130 Sex, Health and Decision Making (undergraduate level): Department of Community and Family Health, College of Public Health, University of South Florida. <i>Sexuality across the lifespan I</i>
Fall 2009	AEP206.3 Applied Epidemiology (undergraduate level): Nobel College, Pokhara University. <i>Social epidemiology</i>
	<b>Instructor</b>
Fall 2009	IPH 101.2 Introduction to Public Health (undergraduate level). Nobel College, Pokhara University
	<b>Mentoring</b>
	<b>Pre-doctoral</b>
Summer2020- Present	Alyssa M Falise. Research Initiatives in Substance Use and Equity (RISE) Lab, University of Florida.
	<b>Graduate</b>
Fall 2022	Matea Bidaburu. Master of Public Health Student Thesis Committee Member. Boise State University.
Fall 2020	Trey B Warren. Study of Teen Opioid Misuse and Prevention Research Lab (STOMP), University of Florida
	<b>Undergraduate</b>
Summer2020- Present	<b>1. Research Initiatives in Substance Use and Equity (RISE) Lab</b> <b>2. Study of Teen Opioid Misuse and Prevention Research Lab (STOMP)</b> <b>University of Florida.</b>
	Davis Cury, Gabriela Garcia, Ayomide David, Aditi Thorat, Gabriela Diaz, Rayaan Ali, Anthony W Pistella, Cyrus Fatemi, Amir A Zafarianian
Fall 2020	<b>3. Community Health-Oriented Mentorship Program (CHOMP), University of Florida.</b>
	Elle M Chumlongluk
Spring 2017- 2019	<b>4. Nobel College, Pokhara University</b> Shibu Shrestha: Knowledge and attitudes of students and teachers towards sex education in schools of Kathmandu (undergraduate thesis)  Agya Khanal: Knowledge and utilization of adolescent-friendly sexual and reproductive health services among the in-school adolescents in an adolescent- friendly school of Lalitpur district (undergraduate thesis)
	<b>Research appointments</b>
2021- Present	<b>Writing group member (unpaid).</b> Stigma group: Johns Hopkins Bloomberg School of Public Health.
Fall 2014- Summer 2016	<b>Graduate Research Assistant.</b> Department of Community and Family Health, College of Public Health, University of South Florida

- Summer 2015 **Graduate Research Assistant.** Department of Global Health, College of Public Health, University of South Florida
- 2016-2018 **Writing group member.** Secondary data group: Infant feeding. Department of Community and Family Health, College of Public Health, University of South Florida.
- 2013 **Co-Investigator.** Water and Health in the Nandamojo Watershed in Guanacaste Province, Costa Rica
- 2010 **Project Coordinator and Principal Investigator.** Promoting awareness and empowerment in Nepalese adolescents on HIV and AIDS and drug use. Nepal

#### Additional appointments

- 2019-2021 **Global Public Health Policy Analysis Specialist.** Policy Wisdom, LLC. (Consultancy, ~10hrs/week)
- 2013 **Consultant.** USAID-funded Saath-Saath Project. FHI360, Nepal (Consultancy, ~30 days)
- 2011-2012 **Program Officer.** USAID -funded Saath-Saath Project. FHI360, Nepal (40hrs/week)
- 2011 **Trainer.** Community-oriented primary health care (COPC). Joint venture of The Embassy of Israel in Nepal, The Hebrew University of Jerusalem and Dhulikhel Hospital, Nepal (4 days)
- 2010 **Consultant.** Joint United Nations Programme on HIV/AIDS (UNAIDS). Kathmandu, Nepal. (~80 days)
- 2009-2010 **National Focal Point of Nepal.** Global Youth Coalition on HIV/AIDS (GYCA).

#### PUBLICATIONS

##### Under-review

\*Indicates student author

- 1 **Sharma V**, Lopez-Quintero C, Rahill GJ, Baldwin JA, Levin BL, Reina Ortiz M, Luitel A, Marhefka S. Discrimination, intersectional discrimination and mental health outcomes among youth survivors of the 2015 earthquakes in Nepal.
- 2 Fatemi C\*, **Sharma V**, Bussing R, Lopez-Quintero C. Prevalence and Drug Correlates of Suicide Behaviors among College Aged Individuals; Analyses of the National Survey on Drug Use and Health
- 3 Falise AM\*, **Sharma V**, Hoeflich CC, Lopez-Quintero C, Striley CW. Screening the invisible population for prescription pain reliever non-medical use and use disorders: Are healthcare providers screening older adult patients?
- 4 Bares CB, Lopez-Quintero C, Wood AL, **Sharma V**. Electronic cigarette and marijuana co-use patterns among adolescent naïve and tobacco users: Racial/ethnic differences.

**Published**

- 1 Budhwani H, **Sharma V**, Long D, Simpson T. (2022). Developing a Clinic-Based, Vaccine-Promoting Intervention for African American Youth in Rural Alabama: Protocol for a Pilot Cluster-Randomized Controlled Implementation Science Trial. *JMIR Research Protocols*, 11(4):e33982. DOI: 10.2196/33982
- 2 **Sharma V**, Cottler LB, Bares, CB, Lopez-Quintero C. (2022). Kratom use among US adolescents: Analyses of the 2019 National Survey on Drug Use and Health. *Journal of Adolescent Health*, 70: 677-681. DOI: 10.1016/j.jadohealth.2021.10.009
- 3 **Sharma V**, Levin BL, Rahill GJ, Baldwin JA, Luitel A, Marhefka SL. (2021). Post-earthquake Self-Reported Depressive Symptoms and Post-Traumatic Stress Disorder and their Correlates among College-Youths in Kathmandu, Nepal. *Psychiatric Quarterly*, 1-15. DOI: 10.1007/s11126-021-09928-5
- 4 Cury JD, Sharma V, Falise AM, Terry EL, Lopez-Quintero C. (2021). Racial-ethnic Differences in Reasons for Misuse of Prescription Medications Among US Adults. *Journal of Addiction Medicine*. DOI: 10.1097/adm.0000000000000932
- 5 Lopez-Quintero C, Warren T\*, Falise A\*, **Sharma V**, Bares C, Oshri A. (2021). Prevalence and drug use correlates of extra-medical use of prescription medications for sleep among adults in the United States: Results of the 2015–2018 National Survey on Drug Use and Health. *Pharmacology Biochemistry and Behavior*, 204, 173169. DOI: 10.1016/j.pbb.2021.173169
- 6 Ortiz MR, **Sharma V**, Casanova J, Corvin J, Hoare I. (2021). Developing Global Health Diplomacy-related Skills Using a COVID-19-like Epidemic Simulation as a Learning Strategy. *The American Journal of Tropical Medicine and Hygiene*, 105(1), 59. DOI: 10.4269/ajtmh.21-0155
- 7 Hernandez I, **Sharma V**, Reina Ortiz M, Rosas C, Ochoa T, Izurieta R, Teran ET. (2020). HIV/AIDS-related knowledge and behavior among school-attending Afro-Descendant youths in Ecuador. *International Journal of Maternal and Child Health and AIDS*, 9(3). DOI: 10.21106/ijma.412
- 8 Shakya DR, Thapa SB, Kar SK, **Sharma V**, Uchida N, Reina Ortiz M, Chapagain G, Poudel CK, Bhattarai PR. (2020). COVID-19 across countries: Situation and lessons for pandemic control. *Journal of BP Koirala Institute of Health Sciences*, 3(1): 9-27. DOI: 10.3126/jbpihs.v3i1.30311
- 9 Reina Ortiz M, Grijalva MJ, Turell, MJ, Waters WF, Montalvo AC, Mathias D, **Sharma V**, Renoy CF, Suits P, Thomas SJ, Leon R. (2020). Biosafety at home: How to translate biomedical laboratory safety precautions for everyday use in the context of COVID-19. *The American Journal of Tropical Medicine and Hygiene*, tpm200677.
- 10 Marhefka SL, **Sharma V**, Schafer EJ, Turner D, Falope O, Louis-Jacques A, Wachira MM, Livingston T, Roig-Romero RM. (2019). ‘Why do we need a policy?’ Administrators’ perceptions on breast-feeding-friendly childcare. *Public health nutrition*, 22(3), 553-563.



- 11 Hernandez I, Reina Ortiz M, Yusuf KK, Ochoa T, Rosas C, **Sharma V**, Naik E, Saihu HM, Teran S, Izurieta R, Teran E. (2019). Risk factors for HIV and STI among female sex workers in a high HIV prevalent region of Ecuador. *Cogent Medicine*, 6(1), 1565292.
- 12 Reina Ortiz M, Le NK, **Sharma V**, Hoare I, Quizhpe E, Teran E, Naik E, Salihu HM, Izurieta R. (2017). Post-earthquake Zika virus surge: disaster and public health threat amid climatic conduciveness. *Scientific reports*, 7(1), 15408.
- 13 Marhefka SL, Green, SM, **Sharma V**, Mellins CA. (2017). “They said “be careful””: sexual health communication sources and messages for adolescent girls living with perinatally-acquired HIV infection. *AIDS care*, 1-5.
- 14 Hernandez I, Johnson A, Reina Ortiz M, Rosas C, **Sharma V**, Teran S, Naik E, Salihu HM, Teran E, Izurieta R. (2016). Syphilis and HIV/Syphilis Co-infection Among Men Who Have Sex with Men (MSM) in Ecuador. *American Journal of Men's Health*, 1557988316680928.
- 15 Hernandez I, Reina Ortiz M, Johnson A, Rosas C, **Sharma V**, Teran S, Naik E, Salihu HM, Teran E, Izurieta R. (2016). Risk Factors Associated With HIV Among Men Who Have Sex With Men (MSM) in Ecuador. *American Journal of Men's Health*, 1557988316646757
- 16 Reina Ortiz M, **Sharma V**, Izurieta R. HIV Prevalence in Asia and the Pacific: an Ecological Approach to Inequalities in the Region. *Health and the Environment Journal* 2012; 3(3):66-77.

#### Preprints

- 1 Reina Ortiz M, **Sharma V**. (2020). Modeling the COVID-19 outbreak in Ecuador: Is it the right time to lift social distancing containment measures?. *medRxiv*.

#### Letter to the Editor/Commentary

- 1 **Sharma V**, Reina Ortiz M, Sharma N. (2020). Risk and protective factors for adolescent and young adult mental health within the context of COVID-19: A perspective from Nepal. *The Journal of Adolescent Health*.
- 2 **Sharma V**, Reina Ortiz M. (2019). A holistic approach to redefining Nepal's health-care system. *The Lancet Global Health*, 7(3), e305.
- 3 Reina Ortiz M, Hoare I, **Sharma V**, Izurieta, R. (2015). State of the globe: Ebola outbreak in the western world: Are we really ready? *Journal of Global Infectious Diseases*, 7(2), 53.

#### Peer-reviewed abstracts

- 1 **Sharma V**, Castaneda E, Shum-Jimenez A, Bittencourt L, Lopez-Quintero C. (2022). Experiences of Discrimination, COVID-19 Related Mental Health and Substance Use Among Hispanic Youth. *Journal of Adolescent Health*. 2022 Apr 1;70(4):S97-8.
- 2 **Sharma V**, Reina Ortiz M, Marhefka S. (2018). Post-Earthquake HIV Risk and Mental Health: Perceived Inequities and Resilience among Adolescents in Nepal. *Journal of Adolescent Health*, 62(2), S109-S110.

- 3 Barr AL, Schafer E, Roig-Romero R, **Sharma V**, Marhefka S. (2018). Factors associated with breastfeeding duration: SI of infant's grandmothers. *Pediatrics*, 142(1):682.
- 4 Le NK, Reina Ortiz M, Hernandez I, Rosas C, **Sharma V**, Teran S,... Izurieta R. (2018). Risky sexual behaviors associated with Human Immunodeficiency Virus Transmission among pregnant Ecuadoreans. Abstract Number 25. *International Journal of Academic Medicine*, 4(3):334.
- 5 Hernandez I, Reina Ortiz M, Rosas , **Sharma, V**, Izurieta R, Teran E. (2015). Predictors of HIV-related knowledge and risk behavior among school-attending teenagers in Esmeraldas, Ecuador. *Tropical Medicine & International Health*, 20 (Suppl. I):285.
- 6 Hernandez I, Adegoke K, Rosas C, Ocho T, Reina Ortiz M, **Sharma V**, Izurieta R, Teran E. Prevalence of STI/HIV and factors associated with STI among female sex workers in Ecuador. *Tropical Medicine & International Health*, 20 (Suppl. I):285.
- 7 Reina Ortiz M, **Sharma V**, Izurieta R. (2015). Geographic Information System-based modeling of the HIV/AIDS epidemic in Ecuador using nationally collected data. *The American Journal of Tropical Medicine and Hygiene*, 93 (4\_Suppl):145 (484).

#### Additional publications

- 1 Reina Ortiz M, **Sharma V**. (2015). Ebola: From fever to fever and from victory to victory. Available from: <http://hscweb3.hsc.usf.edu/health/publichealth/news/fever-fever-victory-victory/>
- 2 **Sharma V**. (2011). Co-existence in Jerusalem, the way I saw it. VOW Magazine 2011. Available from: [http://www.vownepal.com/portal/modules.php?name=Regulars&myaction=show&art\\_type=general&myid=3635](http://www.vownepal.com/portal/modules.php?name=Regulars&myaction=show&art_type=general&myid=3635)
- 3 **Sharma V**, Tulchinsky, TH. (2011). Nepal's challenge of reducing the maternal mortality ratio in the Millennium Development Goals. ASPHER Blog. Available from: <http://www.blog.aspher.org/?p=44>
- 4 **Sharma,V**. (2010). Women and their participation: the Nepalese context. CIPE Youth Essay contest 2010. Available from: <http://www.cipe.org/essay/Women%20and%20their%20participation%20in%20the%20Nepalese%20Context.pdf>
- 5 Uprety AK, **Sharma V**, & Sharma N. (2008). 2008 National Youth Review Report on Progress Made on the 2001 UNGASS Declaration of Commitment on HIV/AIDS: Nepal

#### Invited panels and talks

- 12/15/21 **Speaker**. Mental health: Intersections with HIV and substance use. Capacity building web-series for mental health researcher in Nepal. Sponsored by the U.S. National Institute of Mental Health through a grant provided to George Washington University and coordinated by Transcultural Psychosocial Organization Nepal.
- 9/15/21 **Panelist**. Culture and health. College of Public Health, University of South Florida.
- 5/23/21 **Panelist**. Mental health matters: an introspective look at child and adolescent mental health. The Nepalese Association of Florida (NAF).

- 3/25/21 **Speaker.** Social determinants of health and youth mental health. B.E.S.T Academy, Tampa.
- 9/16/20 **Panelist.** Culture and health. College of Public Health, University of South Florida.
- 6/13/20 **Panelist.** Addressing mental health issues of migrant workers associated with the COVID-19 pandemic. COVID-19 Stress Management Information Desk, Embassy of Nepal, Washington DC, USA.
- 10/21/19 **Panelist.** Global health professions. Undergraduate studies, College of Public Health. University of South Florida.

**GRANTS****Applied**

- 2021 *PIs:* Catalina Lopez-Quintero and Cristina Bares  
*Title:* Trajectories of nicotine and marijuana use and co-use: a bioecological perspective  
*Agency:* NIH (R01)  
*Amount:* \$1,746,620  
*Role:* Other Significant Contributor
- 2021 *PI:* Vinita Sharma  
*Title:* Understanding U.S. primary care physicians' PrEP-prescribing practices to people with co-occurring injecting drug use and mental disorders through intersectional stigma lens.  
*Agency:* NIH (K01)
- 2020 *PI:* Vinita Sharma  
*Title:* Understanding intersectional stigma towards HIV, substance use and mental health problems from the perspective of people at high risk of HIV  
*Agency:* 2021 Thomas H. Maren Junior Investigators Fund Postdoctoral Award, University of Florida (Letter of Intent submitted)
- 2020 *PIs:* Catalina Lopez-Quintero and Cristina Bares  
*Title:* Disparities in e-cigarette use trajectories  
*Agency:* NIH (RFA-OD-19-022, R21)  
*Amount:* \$391,902  
*Role:* Other Significant Contributor

**Awarded**

- 2022 *PI:* Ellen Schafer  
*Title:* Idaho Nutrition Data Needs Assessment Project  
*Awarding agency:* Idaho Department of Health and Welfare  
*Amount:* \$129,180  
*Role:* Co-investigator
- 2019 *PI:* Vinita Sharma  
*Title:* Risk and resilience pertaining to mental health of youths attending a college in Kathmandu who were exposed to the 2015 earthquakes during their adolescence: A mixed method study  
*Awarding agency:* Office of Graduate Studies, University of South Florida  
*Amount:* \$8000 in stipend, full tuition and fees with health insurance

- 2016 *PI:* Vinita Sharma  
*Title:* Exploring HIV Syndemics among Adolescents in Nepal (EHSAN)  
*Awarding agency:* Department of Community & Family Health, USF College of Public Health. Graduate Student/Post-Doctoral Research Awards  
*Amount:* \$1000
- 2016 *PI:* Stephanie Marhefka  
*Title:* Pilot data for an RCT study of an innovative smoking cessation program for people living with HIV  
*Awarding agency:* Proposal Enhancement Grant, USF  
*Amount:* \$25,000  
*Role:* Graduate Research Assistant (grant preparation and staff recruitment)
- 2015 *PI:* Stephanie Marhefka  
*Title:* Research towards implementing technology-based prevention with positives  
*Awarding agency:* NIH (R21 MH108468)  
*Amount:* \$275,000  
*Role:* Graduate Research Assistant (grant preparation, recruitment, dissemination of findings)
- 2015 *PI:* Julie Baldwin and Dina Martinez-Tyson  
*Title:* The Syndemic Nature of HIV/AIDS among Indigenous Populations in Latin America: Risk and Resilience (assisted as a GA) amounting funded by 2015  
*Awarding agency:* Interdisciplinary Team Award, University of South Florida  
*Amount:* \$100,000  
*Role:* Graduate Research Assistant (grant preparation)
- 2015 *PI:* Stephanie Marhefka  
*Title:* Preliminary data collection towards leveraging childcare workers to promote and support breastfeeding  
*Awarding agency:* University of South Florida College of Public Health Individual Investigator Awards.  
*Amount:* \$20,000  
*Role:* Graduate Research Assistant (grant preparation, IRB submission, data analysis, dissemination of findings, manuscript preparation and publication)
- 2014 *PI:* Stephanie Marhefka  
*Title:* Formative work towards developing an innovative STI and unintended pregnancy risk reduction intervention among young, high-risk women  
*Awarding agency:* Women's Health Collaborative Grant, University of South Florida  
*Amount:* \$12,000  
*Role:* Graduate Research Assistant (grant preparation, IRB submission, data analysis)
- 2010 *PI:* Vinita Sharma  
*Title:* Promoting awareness and empowerment in Nepalese adolescents on HIV and AIDS and drug use  
*Awarding agency:* Global Youth Coalition on HIV/AIDS  
*Amount:* \$1,000

**PROFESSIONAL ACTIVITY: CONFERENCES AND MEETINGS****Oral presentation**

- 2021 **Sharma V.** Racial disparity and funding. In *NIDA-T32 Monthly Mentor-Mentee Meeting, University of Florida, FL, USA. November 15, 2021.*
- 2021 Fatemi C\*, **Sharma V.**, Vaddiparti K, Lopez-Quintero C. Effect of the intersection between sexual identity and race-ethnicity on patterns of alcohol use: Analyses of the National Survey on Drug Use and Health, 2015-2019. In *2021 Florida HIV CPR Conference: Connecting Community, Providers, & Researchers (Virtual), April 29-30, 2021.*
- 2021 Lopez-Quintero C, **Sharma V.** Reporting of race and racial categories. In *NIDA-T32 Monthly Mentor-Mentee Meeting, University of Florida, FL, USA. March 8, 2021.*
- 2021 Cury J\*, **Sharma V.**, Falise A\*, Lopez-Quintero C. Racial-Ethnic Differences in Reasons for misuse of prescription medications: Analyses of the National Survey of Drug Use and Health 2015 to 2018. In *American Psychopathological Association Virtual Meeting, March 4-6, 2021.*
- 2020 **Sharma V.** Mental health risk factors and ways of protection in adolescents and adults in COVID-19: An example from Nepal. In *2<sup>nd</sup> International Congress on Occupational Health and Safety in Health Agencies, Turkey, (Dec. 16-Dec.19)* (online).
- 2020 Reina Ortiz M, **Sharma V.**, Hoare I, Casanova J, Corvin J. Developing global health diplomacy skills in a professional global health program. Submitted to the 2020 Annual Meeting of the Association of Schools & Programs of Public Health to be held in Arlington, VA, USA. March 18-20, 2020 (COVID-cancellation)
- 2020 Lopez-Quintero C, **Sharma V.**, David A\*, Escamilla-Sanchez O, Castaneda E\*, Bares C. Racial-ethnic differences in trends of past 30-days alcohol, cigarette and cannabis use among pregnant women in the US. In *NHSN at 20: NHSN at 20: The Legacy and Future Impact of Substance Abuse Research in Underrepresented Communities (Oct.14-Oct.16).*
- 2019 **Sharma V.**, Reina Ortiz M, Hoare I, Thomas N, Salinas A. Reproductive behavior in post-earthquake Nepal: A comparison using a national-level survey. Oral Presentation. American Public Health Association (APHA) 2019 Annual Meeting & Expo. Philadelphia, PA, USA. November 2-6, 2019
- 2017 Turner D, Lockhart E, **Sharma V.**, & Marhefka SL. (2017, November). Views of frontline HIV service providers and advocates on ehealth programs for HIV care and services. In *APHA 2017 Annual Meeting & Expo (Nov. 4-Nov. 8).* American Public Health Association.
- 2017 Barr A, Schafer E, Roig-Romero R, **Sharma V.**, Thompson EL, Daley EM, & Marhefka SL. (2017, November). Factors associated with breastfeeding duration: Positive social influence of maternal grandmothers. In *APHA 2017 Annual Meeting & Expo (Nov. 4-Nov. 8).* American Public Health Association.

- 2017 Schafer E, Barr A, Huynh MP, Thompson EL, **Sharma V**, Roig-Romero R, ... & Marhefka SL. (2017, November). Feeding infants cereal and solid foods: Factors associated from birth to 4 months. In *APHA 2017 Annual Meeting & Expo (Nov. 4-Nov. 8)*. American Public Health Association.
- 2016 **Sharma V**, Rollins C, Walker A. Implementation matters: Considering implementation factors of evidence-based practices at a community agency. American Public Health Association (APHA) Annual Meeting and Expo.
- 2016 **Sharma V**, Rollins C, Walker A. Getting ready for tomorrow: A mixed-methods evaluation of organizational readiness towards implementation of evidence-based practice at Agency for Community Treatment Services (ACTS). 29th Annual Research & Policy Conference on Child, Adolescent, and Young Adult Behavioral Health
- 2015 Reina Ortiz M, Hernandez I, **Sharma V**, Rosas C, Ochoa T, Teran E, Izurieta R. Predictors of HIV/AIDS-related Knowledge and Sexual Behavior among School attending Teenagers in Esmeraldas, Ecuador. American Public Health Association (APHA) Annual Meeting and Expo.
- 2015 Adegoke K, Hernandez I, Ochoa T, Rosas C, **Sharma V**, Reina M, Teran E, Izurieta R. Prevalence of STI/HIV and factors associated with STI among female sex workers in Ecuador. American Public Health Association (APHA) Annual Meeting and Expo.
- 2012 Reina Ortiz M, **Sharma V**, Izurieta R. Ecuador's Progress towards MDG5. Abstract Accepted for oral presentation at the II National Meeting of Tropical Medicine and Research in Quito, Ecuador
- 2012 Reina Ortiz M, **Sharma V**. HIV Prevalence in Asia and the Pacific: An Ecological Approach to Inequalities in the Region. Abstract accepted for oral presentation at the 2012 Population Association of America, San Francisco, CA

#### Poster presentation

- 2022 **Sharma V**, Lopez-Quintero C, Fitzgerald N, Striley C, Varma D, Chaudhary P, Cottler L. Attitudes towards sensitive research among community members with lived experience. In *22<sup>nd</sup> World Psychiatric Association (WPA) World Congress of Psychiatry, August 3-6, 2022*.
- 2022 **Sharma V**, Castaneda E, Shum-Jimenez A, Bittencourt L, Lopez-Quintero C. Experiences of discrimination, COVID-19 related mental health and substance use among Hispanic youth. In *2022 Annual Meeting of the Society for Adolescent Health and Medicine (SAHM), March 9-12, 2022*.
- 2022 **Sharma V**, Zafaranian A\*, Falise AM\*, Lopez-Quintero C. Individuals Diagnosed with an Alcohol Use Disorder: Who Receives What Healthcare advise? In *The ASAM 53rd Annual Conference, March 31 - April 3, 2022*.
- 2021 Thorat AD\*, **Sharma V**, Falise A, Lopez-Quintero C. Are U.S. Parents Talking With Their Adolescent Children About Drugs? In *Center for Undergraduate Research Conference, University of Florida, Gainesville, FL, November 3, 2021*.

- 2021 David A\*, **Sharma V**, Bittencourt L, Gurka K, Lopez-Quintero C. Factors associated with psycho-social distress among pregnant women in the US. In *Center for Undergraduate Research Conference, University of Florida, Gainesville, FL, November 3, 2021*.
- 2021 Garcia G\*, Bittencourt L, **Sharma V**, Cottler L, Lopez-Quintero C. A typology of COVID-19 vaccine hesitant groups. In *Center for Undergraduate Research Conference, University of Florida, Gainesville, FL, November 3, 2021*.
- 2021 Ali R\*, **Sharma V**, Bittencourt L, Lopez-Quintero C. Effect of the Intersection Between Sexual Identity and Attraction on Patterns of Alcohol Use Among Young Adults. In *Center for Undergraduate Research Conference, University of Florida, Gainesville, FL, November 3, 2021*.
- 2021 Pistella AW\*, Bittencourt L, **Sharma V**, Bares C, Lopez-Quintero C. Intersectionalities of tobacco use in the U.S. In *Center for Undergraduate Research Conference, University of Florida, Gainesville, FL, November 3, 2021*.
- 2021 Cury J\*, Falise A\*, **Sharma V**, Terry E, Wang Y, Cook R, Lopez-Quintero C. Correlates of Medical Cannabis Use Among US Adults Who Report Misuse of Prescription Opioids for Pain Relief. In *Center for Undergraduate Research Conference, University of Florida, Gainesville, FL, November 3, 2021*.
- 2021 **Sharma V**, Lopez-Quintero C. Past 12-month prevalence of sexually transmitted diseases and drug use correlates among people living with HIV: Analyses of the National Survey on Drug Use and Health, 2015-2019. In *2021 Florida HIV CPR Conference: Connecting Community, Providers, & Researchers (Virtual), April 29-30, 2021*.
- 2021 **Sharma V**, Cottler LB, Bares, CB, Lopez-Quintero C. Kratom use among US adolescents: Analyses of the 2019 National Survey on Drug Use and Health. The College on Problem of Drug Dependence, 2021.
- 2021 **Sharma V**, Lopez-Quintero C, Marhefka S, Baldwin J, Levin B, Rahill G, Luitel A, Reina Ortiz M. Intersections of Discrimination: Casteism and Mental Health Outcomes among College-Attending Nepali Earthquake Survivors. In *American Psychopathological Association Virtual Meeting, 2021*.
- 2021 **Sharma V**, Lopez-Quintero Q. Intersections of discrimination and mental health outcomes among college-attending Nepali earthquake survivors. In *PHHP Research Day, University of Florida, FL, USA. February 11, 2021*.
- 2021 David A\*, **Sharma V**, Lopez-Quintero C. Racial-Ethnic Differences in Trends in Alcohol Use Among US Pregnant Women: Analyses of the National Survey of Drug Use and Health 2002 to 2018. In *PHHP Research Day, University of Florida, FL, USA. February 11, 2021*.
- 2021 Lopez-Quintero C, Rubio S, **Sharma V**, Bares C. Correlates of Mobile Phone Accessibility Among US Adults with Alcohol or Drug Use Disorders and Mental Health Problems. American Psychopathological Association Virtual Meeting, 2021.

- 2019 **Sharma V**, Reina Ortiz M. Chhaupadhi: Views on an ancestral practice that negatively impacts reproductive health and deteriorates women's rights. Poster Presentation. American Public Health Association (APHA) 2019 Annual Meeting & Expo. Philadelphia, PA, USA. November 2-6, 2019.
- 2017 **Sharma V**, Reina M, Marhefka S. "Life is not how long we live but how well we live everyday": Resilience and mental health outcomes among adolescents in post-earthquake Nepal. 9<sup>th</sup> Annual Graduate Student Research Symposium, USF.
- 2016 **Sharma V**, Grasko T\*, Turner D, Logan R, Schafer E, Brumley J, Louis-Jacques A, Marhefka S. Breastfeeding knowledge and attitudes among childcare workers in the Tampa Bay area: Opportunities for intervention. American Public Health Association (APHA) Annual Meeting and Expo.
- 2015 Reina Ortiz M, **Sharma V**, Izurieta R. GIS-based modeling of the HIV/AIDS epidemic in Ecuador using nationally collected spatiotemporal screening and testing data. American Public Health Association (APHA) Annual Meeting and Expo.
- 2015 Turner D, Johnson A, **Sharma V**, Logan R, Marhefka SL. E-health video-group interventions for MSM living with HIV: Potential for increasing intervention reach. American Public Health Association (APHA) Annual Meeting and Expo.

**Abstract published**

- 2011 **Sharma V**, Lohani S. New perspectives into sexual risk behavior of clients of Methadone Maintenance Treatment in Nepal. 16<sup>th</sup> International Conference on AIDS and STIs in Africa, Addis Ababa, Ethiopia
- 2011 Reina Ortiz M, **Sharma V**, Lohani S. Health inequalities and HIV Risky Sexual Behaviour in Nepalese Population. 10th International Congress on AIDS in Asia and the Pacific, Busan, Korea

**CERTIFICATION**

- 2019-Present Certified in Public Health (CPH). National Board of Public Health Examiners (NBPHE)
- 2021- Present Certified Health Education Specialist Examination (CHES). The National Commission for Health Education Credentialing, Inc.

**PROFESSIONAL MEMBERSHIPS AND SERVICE****University service**

- 2022 School of Public and Population Health Student Affairs Committee, Boise State University
- 2022 School of Public and Population Health BS Public Health Champions, Boise State University

**Professional membership/service**

- 2021-Present Volunteer. IDEA Syringe Exchange Program, Tampa.



2021-Present	Member-in-training. The College on Problems of Drug Dependence (CPDD)
2021-Present	Member, The Southern HIV and Alcohol Research Consortium (SHARC) Stigma Workgroup
2020-Present	Affiliate member, UF Center for Addiction Research and Education (CARE)
2020-Present	Member, The Southern HIV and Alcohol Research Consortium (SHARC) Community Engagement Workgroup
2020-Present	Board member, Nepal Institute of Mental Health
2019	Reviewer, Interdisciplinary Symposium on Qualitative Methodologies 2019, University of South Florida
2018-2019	Member, Eta Sigma Gamma, Delta Kappa Chapter
2017-2019	Member, Society for Adolescent Health and Medicine
2016-2017	Member, AAAS/Science Program for Excellence in Science
2015- 2018	Member, The Honor Society of Phi Kappa Phi
2015-2016	Secretary, Nepalese Students' Association (NeSA)@USF
2015	Guest speaker, Hillel Academy of Tampa
2012	Member, Population Association of America
2010 -2012	Member, International AIDS Society
2010-2011	Team Leader during two residential field practices on public health, Nepal
2010	Founding Member, national youth-led non-governmental organization YUWA
2009	Advocacy sub-committee member, Bali Youth Force, 9th ICAAP

#### **EDITORIAL RESPONSIBILITIES**

2021	Ad hoc reviewer, Journal of Adolescent Health
2020-Present	Ad hoc reviewer, European Journal of Health Psychology
2019-Present	Ad hoc reviewer, Substance Use & Misuse
2018-Present	Ad hoc reviewer, Health Prospect: Journal of Public Health
2015-Present	Ad hoc reviewer, BMC Public Health

#### **WORKSHOPS, TRAININGS, WEBINARS AND E-COURSES**

2022	Before Writing: Faculty Readiness and Submission Considerations. NIGMS Grant Writing Webinar Series for Institutions Building Research and Research Training Capacity.
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2021	Dissemination and Implementation Short-course – Ready, Set, Sustain: Balancing Cost and Value Using Practical Implementation Methods. The University of Wisconsin Madison Institute for Clinical and Translational Research’s Dissemination and Implementation (D&I) Launchpad.
2021	The Stigma of Addiction Summit. National Academy of Medicine.
2021	Course Mapping Camp. The Center for Instructional Technology & Training, University of Florida
2021	Enhancing Health Disparities Research Related to Substance Use and Addiction: Research Gaps and Opportunities. National Institute on Drug Abuse
2020	Overview of Crucial Conversations as a Tool for Resisting Racist Ideas, Discrimination, and Microaggressions. UF Research Service Centers in the College of Engineering.
2020	ABCD Repro-Nim Course (Observer student). National Institute on Drug Abuse (R25-DA051675).
2020	Impact of COVID-19 on Alcohol Use in the U.S webinar. American Psychological Association.
2020	Mental Health Aspects of COVID-19 webinar. American Psychopathological Association, Inc.
2020	K Grant Writing Session. American Physician Scientists Association
2020	College on Problems of Drug Dependence (CPDD) 2020 Annual Scientific Meeting
2020	A virtual roundtable on impacts of COVID-19 on immigrants and refugees in the United States. Florida International University
2020	Joint display analysis for mixed methods research. Methodspace.
2020	Mental health and COVID-19: How the pandemic complicates current gaps in care and what can be done. Trust for America’s Health
2020	Infection Prevention and Control (IPC) for novel coronavirus (COVID-19). WHO
2020	COVID-19: Operational Planning Guidelines and COVID-19 Partners Platform to support country preparedness and response. WHO
2019	Applying the QM Rubric Workshop. Quality Matters
2019	“How to perform analyses in the light of ASA’s recent statement on p-values” Adolescent Medicine Trails Network for HIV/AIDS Interventions
2018	Humanitarian Response to Conflict and Disaster. Harvardx-PH558x
2015	Women’s leadership in doctoral education & careers in academia. University of South Florida
2012	The Virtual Leadership Development Program. USAID, MEASURE Evaluation and Management Services for Health (msh)
2012	Micro-planning process for HIV Prevention among Most at Risk Populations. USAID-funded Saath-Saath Project

2012                      Research Capacity Building Workshop. USAID-funded Saath-Saath Project  
2012, 2008              Research Ethics Training Curriculum. Family Health International

**HONORS, AWARDS AND SCHOLARSHIPS**

2022                      American Society of Addiction Medicine (ASAM) Abstract Submission Honorable  
Mention: Associated Professional. 2022 Annual Conference Program Planning  
Committee.  
2021                      Registration Scholarship. Florida HIV CPR Conference.  
2021                      2021 CPDD Early Career Investigator Award. The College on Problem of Drug  
Dependence.  
2021                      Meeting Scholarship Award for 2021 American Psychopathological Association  
(APPA) Virtual Meeting  
2019                      Dissertation Completion Fellowship, USF Office of Graduate Studies  
2018                      Conference Presentation Grant Program (CPGP) Award, USF Student Government  
2017,16,15              Student Honorary Awards for Research and Practice ('SHARP') Award  
2016                      Department of Community and Family Health, USF College of Public Health Graduate  
Student Research Award  
2014                      USF Graduate Fellowship  
2013                      Gem of LRI (Outstanding alumni) Award  
2012                      Population Association of America (PAA) Travel Award  
2011                      International Conference on AIDS and STIs in Africa (ICASA) Scholarship  
2010                      International AIDS Conference Scholarship  
2010                      IMPH Scholarship, Hebrew University of Jerusalem (fully-funded MPH)  
2010                      Nepal Bidhyabhushan Padak, 'Ga' (national Summa Cum Laude)  
2010                      Nepal Chhatra Padak (national Summa Cum Laude among females)  
2010                      Vice-Chancellor Medal, Pokhara University, Nepal

**LANGUAGES**      **Nepali, English and Hindi:** Advanced                      **Spanish:** Basic

# Desmond Banks

30 Oak Manor Drive | Covington, GA 30016 | 240-496-1521 | qsp4@cdc.gov

## EDUCATION

**Doctor of Philosophy** (2015), Health Policy and Management (Health and Public Policy), The Johns Hopkins Bloomberg School of Public Health, Johns Hopkins University, Baltimore, MD

*Dissertation:* “Father Engagement, Residency Status and Child Well Being Among Blacks and Hispanics in The United States”

*Chair:* Robert Blum, MD, PhD, MPH

**Master of Public Health** (2009), Health Policy and Management (Community Health), City University of New York (CUNY) Graduate School of Public Health, New York, NY

*Capstone Project:* “Physical Activity and Obesity among Urban Youth”

**Bachelor of Arts** (2003), Psychology, Columbia University, New York, NY

## CERTIFICATES

**Certificate in Health Disparities and Health Inequality** (2010), The Johns Hopkins Bloomberg School of Public Health, New York, NY

**Certificate in Alcohol and Substance Abuse Risk Reduction** (2020), Prevention Research Institute, Lexington, KY

## EMPLOYMENT HISTORY

**Clinical Assistant Professor** (January 2020 – Present)

Boise State University, College of Health Sciences, School of Allied Health, Department of Community and Environmental Health  
Boise, ID

- Responsible for designing, developing and delivering public health courses related to structural and social determinants of health, health disparities and health equity.
  - Courses Taught:
    - HLTH 460 – Determinants of Health;
    - MPH 523 – Evaluating Systems Change
    - MPH 531 – Leadership and Strategic Planning
    - HLTH 360 – Health Care Finance
    - MPH 512 – Advanced Prevention and Intervention
    - HLTH 470 – Collaborating for Change

The Centers for Disease Control and Prevention (CDC)  
Office of Minority Health and Health Equity (OMHHE)  
Atlanta, GA

- Planned and managed projects to promote health equity within CDC's COVID-19 response;
  - Conducted comprehensive national public policy scans to identify state policies, laws and regulations which impacted the health and wellbeing of populations disproportionately impacted by COVID-19;
  - Drafted content to articulate social and structural determinants of health, health disparities and health equity to be included on public-facing CDC websites;
  - Conducted analyses of Medicaid data related to COVID-19 infection, hospitalization and vaccination to identify gaps in health equity;
  - Reviewed and conducted clearance of Morbidity and Mortality Weekly Reports (MMWRs) in advance of publication;
  - Developed research agenda for the CDC Chief Health Equity Office (CHEO) COVID-19 response.

**Health Communications Specialist IV** (November 2020 – June 2021)

National Center for Chronic Disease Prevention and Health Promotion (NCCDPHP)  
The Centers for Disease Control and Prevention  
Atlanta, GA

- Developed and executed projects related to the health equity impact of public health policy summaries from the National Center for Chronic Disease Prevention and Health Promotion (NCCDPHP);
  - Prepared comprehensive reports highlighting study results related to reducing health disparities and promoting health equity in cardiovascular disease.
  - Identified and analyzed public health issues, such as hypertension and stroke, and their impact on public policies;
  - Modified technical methods related to data dissemination to promote a focus on addressing social determinants of health to achieve health equity;
  - Developed technical training materials on social determinants of health, health disparities and health equity to enhance the knowledge and capabilities of NCDPHP staff.
  - Reviewed and summarized privacy laws to protect the confidentiality, including Health Insurance Portability and Accountability Act and applicable state and local privacy laws;
  - Implemented and evaluated public health surveillance techniques to capture metrics related to health disparities and health equity.

Seema Verma Consulting (SVC), Indianapolis, IN (October 2014 – November 2017)

Health Management Associates, Washington, DC (November 2017 – November 2020)

- Developed two federal evaluation plans (2015 – 2018 and 2018 – 2020) for the Healthy Indiana Plan (HIP) Section 1115(a) Medicaid Demonstration
  - Provided guidance and technical assistance to federal evaluators on the development of member survey questions, focus group discussion prompts and other qualitative health performance metrics;
  - Provided guidance and technical assistance to federal evaluators on the development of Medicaid Member Information Service (MMIS) metrics, claims and encounter data and other quantitative health performance measures;
  - Provided guidance and technical assistance to federal evaluators on the identification and acquisition of hospital health maintenance organization (HMO) data;
  - Provided guidance and technical assistance to federal evaluators on special evaluation studies regarding member understanding of program policies;
  - Provided guidance and technical assistance to federal evaluators on special evaluation studies regarding member compliance with program policies;
  - Provided guidance and technical assistance to federal evaluators on special evaluation studies regarding member disenrollment for failure to comply with program policies;
  - Provided guidance and technical assistance to federal evaluators on special evaluation studies regarding member acquisition of health care following disenrollment from HIP;
  - Provided guidance and technical assistance to federal evaluators on special evaluation studies regarding member behavior by race, ethnicity, income, education and other health equity indicators;
  - Provided guidance and technical assistance to federal evaluators on the drafting and development of quarterly performance reports required by the Centers for Medicaid Services;
  - Provided guidance and technical assistance to federal evaluators on the drafting and development of national evaluation reports required by the Centers for Medicaid Services.
- Developed a federal evaluation plan for the Indiana End Stage Renal Disease (ESRD) Section 1915(b) Medicaid Demonstration
  - Provided guidance and technical assistance to federal evaluators on the development of member survey questions, focus group discussion prompts and other qualitative health performance metrics;
  - Provided guidance and technical assistance to federal evaluators on the development of Medicaid Member Information Service (MMIS) metrics, claims and encounter data and other quantitative health performance measures;
  - Provided guidance and technical assistance to federal evaluators on the identification and acquisition of hospital health maintenance organization (HMO) data;

- Provided guidance and technical assistance to federal evaluators on special evaluation studies regarding member behavior by race, ethnicity, income, education and other health equity indicators;
- Provided guidance and technical assistance to federal evaluators on the drafting and development of national evaluation reports required by the Centers for Medicaid Services.
- Developed a federal evaluation plan for the Michigan Patient Centered Medical Home (PCMH) State Innovation Model (SIM)
  - Provided guidance and technical assistance to federal evaluators on the development of member survey questions, focus group discussion prompts and other qualitative health performance metrics;
  - Provided guidance and technical assistance to federal evaluators on the development of Medicaid Member Information Service (MMIS) metrics, claims and encounter data and other quantitative health performance measures;
  - Provided guidance and technical assistance to federal evaluators on the identification and acquisition of hospital health maintenance organization (HMO) data;
  - Provided guidance and technical assistance to federal evaluators on special evaluation studies regarding member behavior by race, ethnicity, income, education and other health equity indicators;
  - Provided guidance and technical assistance to federal evaluators on the drafting and development of national evaluation reports required by the Centers for Medicaid Services.

**Research Assistant** (May 2010 – September 2014)

The Johns Hopkins Center for a Livable Future, Baltimore, MD

- Developed a national database to illustrate federal spending within the Food, Conservation, and Energy Act of 2008 (Farm Bill);
  - Conducted policy and expenditure analyses of programs within Farm Bill;
  - Evaluated USDA budget expenditures and presented findings at national conferences;
  - Developed policy analyses of federal legislation regarding concentrated animal feeding operations (CAFOs).

**Case Manager** (May 2003 – September 2009)

University Behavioral Associates of Montefiore Medical Center

- Managed the health equity outcomes of a caseload of forty (40) Medicaid members;
  - Conducted in-person interviews of individuals concerning their substance abuse history, mental health history, housing needs and other indicators related to social determinants of health;
  - Conducted data analyses concerning the efficacy of substance abuse treatment and welfare-to-work programs;
  - Collaborated with providers to improve substance abuse treatment outcomes and presented the results at meetings with treatment facility directors.

## **ACADEMIC PUBLICATIONS**

Bleich, S. N., Herring, B. J., **Flagg (Banks), D. D.**, & Gary-Webb, T. L. (2012). Reduction in purchases of sugar-sweetened beverages among low-income black adolescents after exposure to caloric information. *American Journal of Public Health*, 102(2), 329-335.

## **OTHER PUBLICATIONS**

Indiana Family and Social Services Administration (FSSA). End Stage Renal Disease Section 1115 Waiver Application (2020)

Indiana Family and Social Services Administration (FSSA). Healthy Indiana Plan Interim Evaluation Final Report (2019)

Indiana Family and Social Services Administration (FSSA). Healthy Indiana Plan Draft Evaluation Design (2018)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Emergency Room Co-payment Assessment. (2016)

Seema Verma Consulting (SVC) Inc. Indiana Smoking Attributable Medicaid Expenditures Final Report (2017)

Indiana Governor's Office. Governor's Task Force on Substance Abuse Final Report (2016)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: POWER Account Contribution Assessment. (2016)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Updated Non-Emergency Transportation Evaluation. (2016)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Interim Evaluation. (2016)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Non-Emergency Medical Transportation Evaluation. (2016)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Final Evaluation Design. (2015)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Passive Verification Report (2015)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Emergency Room Copay Protocol (2015)



Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: POWER Account and Copay Protocol (2015)

Indiana Family and Social Services Administration (FSSA). Indiana Healthy Indiana Plan 2.0: Draft Evaluation Design. (2015)

## **PRESENTATIONS**

### **Widening the Gap: Health Disparities in the time of COVID-19**

Boise State University, College of Health Sciences, School of Allied Health, Department of Community and Environmental Health, Boise, ID (2020; available at <https://www.youtube.com/watch?v=Bnb6i57hZws&t=1073s>)

### **Same Disease, Different Outcomes: Early Evidence on Population in COVID-19 Prevalence and Severity**

Vital Statistics Consulting, Maplewood, NJ (2020; available at [https://zoom.us/rec/play/7p17cO6oqD43TNzEsQSDbKd5W9W9Lq6sgSYe\\_6ZZnkznVXUHO1fwNOYXNk1A\\_5FITZfw50Jnmd81oYE?continueMode=true&x\\_zm\\_rtaid=-WTC-U0FTWuRY6kFWxc2RQ.1595082164802.198fd0856abc93dfc977b053d3cee167&x\\_zm\\_rhtaid=322](https://zoom.us/rec/play/7p17cO6oqD43TNzEsQSDbKd5W9W9Lq6sgSYe_6ZZnkznVXUHO1fwNOYXNk1A_5FITZfw50Jnmd81oYE?continueMode=true&x_zm_rtaid=-WTC-U0FTWuRY6kFWxc2RQ.1595082164802.198fd0856abc93dfc977b053d3cee167&x_zm_rhtaid=322))

### **Health Performance Accelerator Webinar Series: Achieving Health Equity for Disadvantaged Populations**

Health Management Associates, Lansing, MI (2020; available at: <https://vimeo.com/453837473>)

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**EDUCATION**

- 2014 University of Northern Colorado,  
Greeley, CO, **Ph.D.**  
*Applied Statistics & Research Methods: Research Methods Emphasis*
- 2006 University of Northern Colorado,  
Greeley, CO, **M.A. Psychology. Emphasis: Human  
Neuropsychology**
- 2006 University of Northern Colorado,  
Greeley, CO, **M.S.**  
*Applied Statistics & Research Methods: Research Methods Emphasis*
- 2003 Colorado State University,  
Ft. Collins, CO, **B.S. Psychology**
- 1992 Colorado State University,  
Ft. Collins, CO, **B.S. Exercise and Sport Science**  
*Concentration: Education*

**UNIVERSITY EXPERIENCE**

- 2020-2022 **Clinical Associate Professor**  
School of Public & Population Health  
College of Health Sciences  
Boise State University, Boise, ID
- 2017- 2020 **Clinical Assistant Professor**  
Community and Environmental Health  
College of Health Sciences  
Boise State University, Boise, ID
- 2018-pres **Data Analyst (.20 FTE)**  
College of Health Sciences  
Boise State University, Boise, ID
- 2016-2017 **Assistant Professor (Special Appt.)**  
Department of Statistics  
Colorado State University, Ft. Collins, CO

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## TEACHING EXPERIENCE

### **Boise State University**

- 2021-2022     **Instructor** – HLTH 382 *Research Methods in Health*  
In Person (Spring); 15 week.
- Instructor** – HLTH 418 *Advanced Public Health Analysis*  
In Person (Summer, Fall, Spring); 15 week.
- Instructor** – HLTH 418 *Advanced Public Health Analysis*  
Online (Fall and Spring); 7 week.
- Instructor** – HLTH 488 *Student Outcomes Assessment*  
Online (Summer, Fall and Spring); 7 week.
- Instructor** – HLTH 497/597 *Special Topics: Intro to Data Science using R*  
In Person (Spring); 15 week.
- Instructor** – PUBH 488 *Student Outcomes Assessment*  
Online (Summer, Fall and Spring); 7 week.
- Instructor** – PUBH 418 *Advanced Public Health Analysis*  
Online (Summer, Fall and Spring); 7 week.
- 2020-2021     **Instructor** – MPH 541 *Leading with Data*  
In Person (Fall); 15 week.
- Instructor** – HLTH 382 *Research Methods in Health*  
In Person (Spring); 15 week.
- Instructor** – HLTH 418 *Advanced Public Health Analysis*  
Online (Fall and Spring); 7 week.
- Instructor** – HLTH 418 *Advanced Public Health Analysis*  
In Person (Summer, Fall, Spring); 15 week.
- Instructor** – PUBH 418 *Advanced Public Health Analysis*  
Online (Summer, Fall and Spring); 7 week.

- Instructor** – PUBH 488 *Student Outcomes Assessment*  
Online (Spring); 7 week.
- Instructor** – HLTH 488 *Student Outcomes Assessment*  
Online (Fall and Spring); 7 week.
- 2019-2020     **Coordinator** – MHLTHSCI 596 *Thesis Research*  
In Person (Fall, Spring); 15 week.
- Instructor** – PUBH 318 *Public Health Analysis*  
Online (Fall); 7 week.
- Instructor** – PUBH 488 *Student Outcomes Assessment*
- Coordinator** – MHS 596 *Independent Study*  
In Person (Spring); 15 week.
- Instructor** – MHS 506 *Applied Statistics*  
Hybrid (Spring); 7 week.
- 2018-2019     **Instructor** – PUBH 318 *Public Health Analysis*  
Online (Fall); 7 week.
- Instructor** – MHLTHSCI 688 *Thesis Proposal*  
In Person (Spring); 15 week.
- 2018-2019     **Instructor** – MHLTHSCI 552 *Applied Statistical Methods*  
In Person (Spring); 15 week.
- 2017-2018     **Instructor** – MHLTHSCI 552 *Applied Statistical Methods*  
In Person (Spring); 15 week.

### Colorado State University

- 2012- 2015     **Instructor**  
Department of Statistics  
Colorado State University, Ft. Collins, CO  
STAT 201 (*General Statistics; Instructor and Coordinator*)  
STAT 301 (*Introductory Statistics*)  
STAT 311 (*Statistics for the Behavioral Sciences*)  
STAT 307 (*Biostatistics*)  
STAT 358 (*Introduction to Statistical Computing using SAS*)

2011            **Instructor**  
 Department of Psychology,  
 Colorado State University, Ft. Collins, CO  
 PSY 655A, PSY655C (*Research Issues and Models*)

**University of Northern Colorado**

2008-2010    **Instructor**  
 University of Northern Colorado, Greeley, CO  
 STAT 150 (*Introduction to Statistical Analysis*)

2004- 2007   **Instructor**  
 University of Northern Colorado, Greeley, CO  
 PSY 100 (*Principles of Psychology*)  
 PSY 340 (*Principles of Learning*)

**UNIVERSITY SERVICE**

2021-pres.    **SPPH Data Analytics Group**  
 Developing curriculum for data certificate and emphasis areas

2021-pres.    **SPPH Graduate Curriculum Committee**  
 Developing curriculum for future MPH and doctorate programs

2018-pres.    **COHS Operations Data Analyst**  
 Assist with Bronco Budget 2.0 metrics, perform ad hoc queries,  
 track Blueprint for Success metrics

2018-pres.    **SPPH Strategic Enrollment**  
 Assist with the efforts of SPPH Strategic Enrollment & Management  
 Partnership with Enrollment Services, provide data, insights

2021-2022    **Faculty Search Committee**  
 Participated in the search for two PHPS faculty positions

2018            **Graduate College**  
 Judged graduate student poster presentations at the Graduate Student  
 Showcase

2018-2020	<b>Community &amp; Environmental Health Graduate Program Committee</b> Participated as a member of the department's graduate program committee
2017-2021	<b>Staff Search Committee</b> Participated in several searches for staff positions
2017-2020	<b>Faculty Search Committees</b> Participated in numerous searches for faculty positions
2017-2019	<b>Curriculum Committee</b> Participated in curriculum revision of BS programs
2017-2019	<b>BAPH Program Development</b> Worked with eCampus to develop new fully online program

### **CONTRACTS & GRANTS**

Development of an Evaluation Plan and Pilot Implementation of Data Collection and Reporting Strategies  
Lincoln County Community Paramedicine (CHEMS) Pilot, 2020.

Idaho Dept. of Health and Welfare

Contract # HC191700; Total Contract Amount: \$50,000

Provide and evaluate methods and approaches to data management, analysis, and integration to support CHEMS in the state of Idaho.

Role: **Principal Investigator**

SHIP Subscription Services (2018-2019)

Idaho Department of Health and Welfare.

Provide subscription services to the SHIP Learning Resource Site for Idaho clinics and public health regions.

**Supporting investigator** (\$318,000)

SHIP Learning Resource Site (2018-2019)

Idaho Department of Health and Welfare.

Develop a learning and content management site to deliver education content after the SHIP grant is completed.

**Supporting investigator** (\$726,000)

  
**PUBLICATIONS & PRESENTATIONS**

Beauchemin, J.D., Gabana, N., **Ketelsen, K.**, & McGrath, C. (2019) Multidimensional wellness promotion in the health and fitness industry, *International Journal of Health Promotion and Education*, 57:3, 148-160, DOI: 10.1080/14635240.2018.1559752

Chapa, M., Wilkinson, B., Geselle, K., & **Ketelsen, K.** (2018). Healthy Habits, Healthy U: Knowledge and intention in primary cancer prevention. 2018 Undergraduate Research and Scholarship Conference, Boise State University.

**Ketelsen, K.** (2014). A monte carlo simulation to examine the effects of violating the normality assumption in 2-level hierarchical linear models with unbalanced designs (Doctoral dissertation). Proquest Dissertations & Theses. (Publication #3644138).

**Ketelsen, K.**, & Welsh, M. (2010). Working memory and mental arithmetic: A case for dual central executive resources. *Brain and Cognition*, 74, 206-209.

**Ketelsen, K.**, Gilliam, D. (2007, April). *Dose-response effects of nicotine on activity in fetal alcohol exposed mice*. Poster session presented at Research Day during Academic Excellence Week at the University of Northern Colorado, Greeley, CO.

Deffenbacher, J., **Ketelsen, K.** (2003, April). *Driving anger and substance abuse*. Paper presented at the annual meeting of the Rocky Mountain Psychological Association, Denver, Colorado.

**In Progress**

Josephsen, J., **Ketelsen, K.**, Weaver, M., & Scheuffele (2022). Dementia Care Competencies for Higher Education: A Pilot Study.

**Ketelsen, K.** & Smutny, G. (2020). Integrating data modules into the Health Studies curriculum.

**Ketelsen, K.**, Nutting, A., & Toevs, S. (2020). Five years of falls: Resource mapping Fit & Fall Proof Program locations and EMS data in Idaho.

Nutting, A., **Ketelsen, K.**, & Carter, K. (2020). The presence of legionellae in respiratory devices: Convenience sampling of Idaho long-term care facilities.

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**MENTORING EXPERIENCE**

- 2020                    **Master's Thesis Chair**  
*The presence of legionellae in respiratory devices: Convenience sampling of Idaho long-term care facilities (A. Nutting)*

**PROFESSIONAL DEVELOPMENT**

- 2022    **Creating a Compelling Teaching Portfolio (Spring)**  
Center for Teaching and Learning
- 2021    **Creating a Compelling Teaching Portfolio (Fall)**  
Center for Teaching and Learning
- 2019    **Conference on Statistical Practice**  
*Successful Data Mining in Practice*
- 2018    **Conference on Statistical Practice**  
*Introduction to Big Data Analysis*
- 2017    **McGraw-Hill Education Symposium**  
New Orleans, LA
- 2010    **AERA Annual Meeting**  
Denver, CO  
*Designing Adequately Powered Cluster Randomized trials*
- 2009    **AERA Annual Meeting**  
San Diego, CA.  
*A 'Gentle' Introduction to Statistical Analysis and Teaching with R*  
*An Introduction to Hierarchical Linear Modeling with R*  
*Foundations of Success in Academe: Research, Writing, Reflection, and Organization*
- 2008    **Scientific Software International (Sept. 17-20)**  
University of Chicago, IL.  
*Hierarchical Linear Modeling,*  
Presenters: Steve Raudenbush & Tony Bryk



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2008 **Joint Statistical Meetings (JSM)**

Denver CO.

*Missing Data: Multiple Imputation*, Presenter: Paul Allison

**SOFTWARE PROFICIENCY**

SAS, SQL, R, JMP, SPSS, Excel

**TAYLOR NEHER, DrPH(c), MPH**

C: 208-861-6677 | taylorlneher@gmail.com

### **PROFESSIONAL BACKGROUND**

Public health practitioner adept at developing and coordinating comprehensive public health research programs and initiatives. Background includes project development and implementation, data analysis and reporting, public health programming, teaching, grant writing, industry partnerships, community engagement, and public health communications. Passionate about health equity and improving the lives of everyone in the community. In addition to extensive graduate training in Health Education & Promotion and Public Health Leadership.

### **EDUCATION**

**Dec. 2022**

**Doctor of Public Health** – Public Health Leadership and Communication

University of Arkansas for Medical Sciences — Little Rock, AR, USA

*Dissertation: An Evaluation of Graduate Student Stress Levels, Stressors Experienced, and Resource Awareness at the University of Arkansas for Medical Sciences*

*Final Defense Schedule for November 18<sup>th</sup>, 2022*

**2017**

**Master of Public Health** - Health Promotion and Community Health

Texas A&M University — College Station, TX, USA

*Capstone: Gender Dysphoria in Aging Populations: Communication interventions to educate the medical field on a growing public health concern*

*Advisor: Dr. James (Jim) Burdine*

**2015**

**Bachelor of Science:** Health Sciences

Boise State University — Boise, ID, USA

### **PROFESSIONAL EXPERIENCE**

**Boise State University School of Public Health and Population Science - Boise, Idaho**

**Dec 2021 – Present Project Manager and Lecturer**

- Lecturer/Mentor for both undergraduate and graduate public health programs
- Collaborates across campus and manages statewide community health needs assessment evaluation efforts with local hospital systems
- Manages statewide efforts to address youth mental health for Communities 4 Youth initiatives
- Develops successful grant proposals and manages related tasks

**Calm.com, Inc. – Remote**

**Feb 2020 – May 2022 Senior Research Project Manager (Contractor)**

- Plans, develops, and maintains research procedures and protocols for national large-scale, industry leading public health studies and initiatives
- Leads science strategy, program management, technology approach, implementation methodology
- Leads complex experiments, data collection, and data analysis
- Interpret and present data to a variety of audiences, including industry stakeholders, community members, and the science community
- Partners with multiple levels of the company and external partners to discuss goals and strategies
- Establishes and maintains training protocol for staff and students to train in the essential elements of the program;
- Leads program compliance with government regulations, company policies, and Institutional Review Boards (IRB)

**Arkansas Foodbank -Little Rock, AR**

**Feb 2020 – Feb 2021 Grants and Evaluations Coordinator**

- Streamlined and organized grant tracking and reporting protocols
- Developed reporting guidelines, submitted reports and evaluations based on findings
- Cultivated grant opportunities and resources
- Over 1m grant money awarded in the first two quarters of employment based on submitted grants
- Initiated development of research program and efforts to improve outcomes among clients

- Utilized Smartsheets and Tableau to communicate client data across foodbank departments, National Feeding America offices, and community members

**University of Arkansas for Medical Sciences -Little Rock, AR**

**Aug 2017-March 2020      Research Coordinator**

- Established a community stakeholder board with key members for identifying study locations and participants
- Coordinated research studies, which include identifying, recruiting, corresponding, and retaining patients in studies
- Develop and maintain IRB protocols for working within the carceral system & mental health that meets all ethical guidelines
- Develop qualitative and quantitative data collection tools to establish the impacts of a pilot project
- Manage and analyze both qualitative data and sizeable quantitative data sets
- Track data collection efforts and participant follow-up with community health workers post-release
- Communicate findings to both community members and research communities
- Aid in developing research protocols within the jail setting
- Train and manage data collectors on how to collect data within the carceral setting and ethical guidelines
- Utilized programs like Qualtrics, SPSS, SAS, and RedCap on a daily basis for evaluation and data collection

**Texas A&M University Center for Population Health and Aging — College Station, TX**

**08/2015 to 05/2017      Graduate Research Assistant**

- Designed and developed implementation plans for evidence-based programs
- Trained team members on data collection protocols and procedures
- Managed data collection and protocols for the center's EPBs
- Implemented programs to improve health outcomes in aging adults
- Networked with local businesses & leaders to build partnerships/collaboration
- Prepared presentations, grant proposals, and other technical writings based on departmental research needs

**Austin Pride — Austin, TX**

**05/2016 to 03/2017      Grant Writer/Board Member**

- Streamlined fundraising and grant writing efforts for the community center
- Compiled and organized grant submissions
- Organized working budget to stay up to date with all funding requirements
- Planned community programs for the LBGTQ population to build safe relationships within the community

**Idaho Public Health Association — Boise, ID**

**06/2014 to 07/2015      Public Health Intern**

- Improved marketing efforts to increase membership reach
- Coordinated events to provide networking opportunities for public health professionals
- Conducted and interpreted qualitative research on public health awareness to enhance students' awareness of professional organizations
- Rebuilt organization website to increase ease of access for members

**Quit & Live Global, INC — Boise, ID**

**06/2014 to 05/2015      Tobacco Cessation Coach**

- Increased community awareness and involvement of tobacco cessation programming to offer educational classes at local hospitals
- Implemented organizational protocols for professional and participant profiles to consolidate internal office efforts
- Streamlined online marketing efforts to increase online presence
- Coached participants through the tobacco cessation program to reduce tobacco usage through employer offered programming

**Idaho Diabetes Youth Programs — Boise, ID****09/2013 to 09/2017 DTreat Conference Director**

- Development and coordination of a health education conference for Type 1 Diabetics ages 18-35
- Oversaw all the logistical efforts, including planning, scheduling, facilitating, and promotion for successful conference implementation
- Increased program capacity from previous DTreat conferences with a 100% increase in participation
- Evaluated programs implemented for young adults and equitable access to resources upon transitions into young adulthood

**TEACHING**

Fall 2022	Instructor – Community Assessments Boise State University (Face-to-Face, 2 credit hours, graduate)
Spring 2022	Co-Instructor - Introduction to Health Science and Public Health Boise State University (Face-to-Face, 3 credit hours, undergraduate)
Spring 2019	Guest Lecturer throughout the semester - Theories of Health Behavior and Health Education University of Arkansas for Medical Sciences (Face-to-Face, 3 credit hours, masters)
Spring 2019	Guest Lecturer throughout the semester - Program Planning and Evaluation University of Arkansas for Medical Sciences (Face-to-Face, 3 credit hours, masters)

**STUDENT MENTORING**

- 2022- Ongoing **Adrian Rodriguez** - Boise State University Public Health Undergraduate & Graduate student  
Undergraduate/Graduate research advisor
- 2022- Ongoing **Ashley Harris** - Boise State University Master of Public Health Student  
Member of thesis committee

**PEER-REVIEWED PUBLICATIONS**

\* denotes a student co-authors and community partners are underlined

1. Espel-Huynh, H., **Neher, T.**, Puzia, M., Huberty, J. (2022) Bringing Calm to Work: A Randomized Controlled Trial Testing the Pragmatic Effectiveness of a Consumer-Based Mindfulness Mobile App in the Workplace. *JMIR mHealth and uHealth*. <http://dx.doi.org/10.2196/38903>
2. Green, J., **Neher, T.**, Puzia, M., Laird, B., & Huberty, J. (2022). Pregnant women's use of a consumer-based meditation mobile app: A descriptive study. *DIGITAL HEALTH*. <https://doi.org/10.1177/20552076221089098>
3. Huberty, J., Bhuiyan, N., **Neher, T.**, Joeman, L., Mesa, R., Larkey, L. (2022). Leveraging a Consumer-Based Product to Develop a Cancer-Specific Mobile Meditation App: Prototype Development Study *JMIR Form Res*. DOI: 10.2196/32458
4. Marshall, S.A., Barham, C. \*, **Neher, T.**, Zielinski, M.J., Brinkley-Rubinstein, L., Gorvine, M.M., Zaller, N. (2022). Acceptability of a Community Health Worker Program to Link High-Risk People in Jail to HIV Pre-Exposure Prophylaxis. *Journal of Health Care for the Poor and Underserved* 33(1), 149-166. [doi:10.1353/hpu.2022.0012](https://doi.org/10.1353/hpu.2022.0012).
5. **Neher, T.**, Green, J., Puzia, M., Huberty, J. (2021). Describing the Use of a Mindfulness-Based App for Sleep and Mental Well-Being, Across Age, in Children. *Child Youth Care Forum*. <https://doi.org/10.1007/s10566-021-09651-z>
6. Marshall, S.A., **Neher, T.**, Sockwell, L., Brown, L., Zaller, N. (2020). Current HIV Testing & Risk Behaviors among Students at Historically Black Colleges & Universities in a Southern State. *Journal of the National Medical Association*. <https://doi.org/10.1016/j.jnma.2020.04.008>.
7. Zaller, N.D., Neher, T.L., Presley, M. \*, Horton, H., Marshall, S.A., Zielinski, M.J., Brinkley-Rubinstein, L. (2020) Barriers to linking high-risk jail detainees to HIV pre-exposure prophylaxis. *PLoS ONE*. <https://doi.org/10.1371/journal.pone.0231951>
8. **Neher, T.**, Udochi, A. \*, Wilson, K. \*, Guillory, D., Zaller, D., Zielinski, M.J. (2021) Conducting Health Research in Carceral Systems: Considerations and Recommendations. *American Journal of Public Health*. <https://doi.org/10.2105/AJPH.2019.305449>

9. Allison, M.K., Marshall, S.A., Archie, D.S., **Neher, T.**, Stewart, G., Anders, M.E., Stewart, M.K. (2019). Community-engaged development, implementation, and evaluation of an interprofessional education workshop on gender-affirming care, *Transgender Health*. <https://doi.org/10.1089/trgh.2019.0036>
10. **Neher, T.**, Towne, Jr, S., & Toevs, S. (2017). Identifying Factors Associated with Participation in T1D Support Program for Young Adults. *PLAID: People Living With And Inspired By Diabetes*. <http://dx.doi.org/10.17125/plaid.2017.98>
11. Ory, M.G., Lee, S., Han, G., Towne, S.D., Quinn, C., **Neher, T.**, Stevens, A., Smith, M.L.(2016) Effectiveness of a Lifestyle Intervention on Social Support, Self-Efficacy, and Physical Activity among Older Adults: Evaluation of *Texercise Select. Int. J. Environ. Res. Public Health*. <https://doi.org/10.3390/ijerph15020234>

### **OTHER PUBLICATIONS**

1. Rodriguez, A.\* , **Neher, T.**, Toevs, S. (2022). Improving Hispanic Family Caregiver Projects: Identifying How Unique Barriers and Cultural Values Influence Service Utilization and Caregiver Roles. Report dprepared by Idaho Caregiver Alliance.
2. Towne SD Jr, Ory MG, Quinn C, Howell D, Nwaiwu O, **Neher TL** , Smith ML.(2016). Availability of Evidence-Based Fall Prevention Programs in Texas. Policy brief prepared by Texas A&M Program on Healthy Aging.

### **PRESENTATIONS**

1. **Neher, T.L.** (2020) Lessons Learned from Health and Risk Behavior Screening Efforts within a County Jail Setting. Presentation at the 13th Academic and Health Policy on Conference on Correctional Health. Raleigh, NC. April 2020.
2. **Neher, T.L.**, Zaller, N., Zielinski, M.J., Marshall, S.A., Brinkley-Rubinstein, L. (2019) PrEP Prior Knowledge, Acceptability, and Intervention Strategies in a County Jail. Poster at the Annual Conference of American Public Health Association. Philadelphia, PA. November 2019.
3. **Neher, T.L.**, Brinkley-Rubinstein, L., Marshall, S.A., Zielinski, M.J., Zaller, N. (2018) HIV Risk Factors and PrEP Knowledge of Incarcerated Women in a County Jail. Presentation at the Annual Conference of American Public Health Association. San Diego, CA. November 2018.
4. **Neher, T.L.**, Zielinski, M.J., Marshall, S.A., Brinkley-Rubinstein, L., Zaller, N. (2018) Lessons Learned from County Jail HIV Risk Factor Screenings. Poster presented at the *6th Annual Rural HIV Research and Training Conference*. 26. <https://digitalcommons.georgiasouthern.edu/ruralhiv/2018/2018/26>
5. Marshall, S.A ., Ozuna, I., Brown, L. , Sockwell, L., **Neher, T.** & Zaller, N. (2018). *HIV Testing & Risk Behaviors at Historically Black Colleges & Universities in Arkansas*. Poster presented at the annual meeting of the Arkansas Public Health Association, Little Rock, AR.
6. Ory, M.G., Lee, S., Towne, S., Quinn, C., **Neher, T.**, Smith, M.L. (2017) Effectiveness of a Practice-based Health and Wellness Program on Improving Fall- and Physical activity-related Self-Efficacy and Mobility for Community-Dwelling Older Adults. Presentation at the Annual Conference of American Public Health Association. Atlanta GA. November 2017.
7. **Neher, T.L.** (2016) Effectiveness and Need of Support Programs For Young Adults with Type 1 Diabetes (T1D). Poster presentation at the Texas A&M School of Public Health, Public Health Week Research Conference. April 2016. Bryan, Texas
8. **Neher, T.L.** (2015) Young Adult Program Awareness and Demands. Presented at the Diabetes Education Camping Association (DECA) Annual International Meeting. December 2015. Vancouver, BC
9. **Neher, T.L.**, Toevs, S. (2015) Student Professional Health Organization Awareness. Poster presentation at the Boise State University Interprofessional Research Conference. April 2015. Boise, ID
10. **Neher, T.** (2015) Student Awareness of Professional Health Organizations. *College of Health Sciences Presentations*. 11. [https://scholarworks.boisestate.edu/hs\\_15/11](https://scholarworks.boisestate.edu/hs_15/11) Boise, ID

**ACADEMIC GRANT WORK AND PROPOSALS CONTRIBUTED TO**

**Idaho Nutrition Data Needs Assessment Project**

\$129,180.00

Boise State University, 03/01/22-12/16/22

Idaho Department of Health and Welfare

Purpose: Conduct a needs assessment, an evaluation, and identify resources for Idaho’s SNAP-Ed nutrition education programs.

Role: Co-Investigator

**ABSTRACT REVIEWER**

American Public Health Association – Student Presentation Submissions – Annual Conference 2019; 2020

**SERVICE**

Feb 2022 - Present	<b>Elected Board Member</b> , Idaho Public Health Association
Jan 2019 - Dec 2020	<b>Elected Board Member</b> , College of Public Doctorate Program Advisory Board University of Arkansas for Medical Sciences
Nov 2019 - Feb 2021	<b>Content Manager</b> , Justice & Incarcerated Health Committee American Public Health Association
Aug 2017 - Feb 2021	<b>Member</b> , Sexual Health Research Interest Group Member University of Arkansas for Medical Sciences
May 2016- March 2017	<b>Grant Writer/Board Member</b> Austin Pride — Austin, TX

**PROFESSIONAL AFFILIATIONS**

- 2021- present Social Behavioral Medicine
- 2018-present American Public Health Association (APHA)
- 2013-2015, 2021-present Idaho Public Health Association (IPHA)
- 2017-2021 Arkansas Public Health Association (APHA)

**ABSTRACT REVIEWER**

American Public Health Association – Student Presentation Submissions – Annual Conference 2019; 2020

**CERTIFICATIONS**

- Institute for Healthcare Improvement
  - Triple Aim for Populations
  - Improvement Capability
- CITI Certified

**CONSENT**  
**APRIL 25, 2023**

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**SUBJECT**

Data Management Council Appointments

**REFERENCE**

April 2020	The Board reappointed Matthew Rauch, Georgia Smith, and Dianna Renz to the Data Management Council. The Board appointed Chris Bragg to the Data Management Council.
August 2020	The Board appointed Leslie Odom and Kevin Whitman to the Data Management Council. The Board approved the first reading of Board Policy I.O., shifting one position from the Department of Education to the Office of the State Board of Education to align with the move of the ISEE data system and adding one at-large member.
October 2020	The Board approved the second reading of Board Policy I.O., shifting one position from the Department of Education to the Office of the State Board of Education to align with the move of the ISEE data system and adding one at-large member.
February 2021	The Board reappointed Chris Campbell and Todd King to the Data Management Council.
April 2021	The Board reappointed Cathleen McHugh, Grace Anderson, Tami Haft, Scott Thomson, and Heather Luchte to the Data Management Council. The Board appointed Spencer Barzee to the Data Management Council.
October 2021	The Board appointed Thomas Sharpe to the Data Management Council.
December 2021	The Board appointed Kevin Chandler to the Data Management Council.
June 2022	The Board reappointed Thomas Sharpe, Matthew Rauch, and Georgia Smith to the Data Management Council. The Board appointed Ayaka Nukui to the Data Management Council.
October 2022	The Board appointed Lindsey Brown to the Data Management Council.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section I.O.

**BACKGROUND/DISCUSSION**

The Data Management Council (Council) was established by the Board pursuant to Board policy I.O. to make recommendations to the Board on the oversight and development of Idaho's Statewide Longitudinal Data System (SLDS) and to oversee the creation, maintenance and usage of said system. Section 33-133,

**CONSENT**  
**APRIL 25, 2023**

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Idaho Code, defines the state “data system” to include the state’s elementary, secondary, and postsecondary longitudinal data. The SLDS consists of three areas of data and is referred to as EASI (the Education Analytics System of Idaho). EASI is a P-20W system consisting of P-12, postsecondary, and workforce data. The P-12 data is commonly referred to as the Idaho System for Educational Excellence (ISEE), the postsecondary data is referred to as the Postsecondary Measures of Academic Progress (PMAP), and the labor data (managed by the Department of Labor) is referred to as the Idaho Labor Market Information.

There are 13 seats on the Council representing the following constituencies:

- a. Two representatives from the Office of the State Board of Education;
- b. Three representatives from public postsecondary institutions, of whom at least one shall be from a community college and no more than one member from any one institution;
- c. One representative who serves as the registrar at an Idaho public postsecondary institution, which may be from the same institution represented above;
- d. One representative from the State Department of Education;
- e. Three representatives from a school district, with at least one from an urban district and one from a rural district, and no more than one member from any one district;
- f. One representative from the Division of Career Technical Education;
- g. One representative from the Department of Labor;
- h. One at-large member.

Appointments are made for two-year terms and commence on July 1<sup>st</sup>. Incumbent candidates can be reappointed as long as they are eligible to serve based on the Council’s current membership structure.

One public postsecondary institution seat is currently vacant. Applications for this vacancy were sought. Two applications were received, Dr. Shari Ellertson, Senior Executive Director, Institutional Effectiveness, Boise State University and Wesley McClintick, Director, Institutional Research, University of Idaho. Both applicants are highly qualified for the position. The Council voted to recommend Dr. Ellertson to the Board for appointment.

**IMPACT**

The appointment of Dr. Ellertson will result in all seats on the Data Management Council currently being filled. The reappointment of seven members will give the Council 12 members effective July 1. One school district representative will need to be made before all vacant positions are filled.

**ATTACHMENTS**

- Attachment 1 – Current DMC Membership March 2023
- Attachment 2 – Statement of interest from Dr. Shari Ellertson
- Attachment 3 – Resume of Dr. Shari Ellertson



**CONSENT**  
**APRIL 25, 2023**

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- Attachment 4 – Statement of interest from Wesley McClintick
- Attachment 5 – Resume of Wesley McClintick
- Attachment 6 – DMC Reappointments

**STAFF COMMENTS AND RECOMMENDATIONS**

The Data Management Council considered the applications during a meeting in January. After a long discussion on the different strengths offered by both candidates, the Council voted to recommend Dr. Ellertson to the Board for appointment due, in large part, to her previous experience on the Council.

All individuals being considered for reappointment have been active members of the Council and have expressed an interest in continuing to serve.

Staff recommends approval.

**BOARD ACTION**

I move to approve the appointment of Dr. Shari Ellertson to the Data Management Council as a public postsecondary institution representative commencing immediately and ending June 30, 2024.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to approve the reappointment of Dr. Grace Anderson to the Data Management Council as a public postsecondary institution representative commencing July 1, 2023 and ending June 30, 2025.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to approve the reappointment of Dr. Lindsey Brown to the Data Management Council as a public postsecondary institution registrar representative commencing July 1, 2023 and ending June 30, 2025.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to approve the reappointment of Chris Campbell to the Data Management Council as an Office of the State Board of Education representative commencing July 1, 2023 and ending June 30, 2025.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**CONSENT**  
**APRIL 25, 2023**

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I move to approve the reappointment of Todd King to the Data Management Council as an at-large representative commencing July 1, 2023 and ending June 30, 2025.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to approve the reappointment of Heather Luchte to the Data Management Council as the Division of Career Technical Education representative commencing July 1, 2023 and ending June 30, 2025.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to approve the reappointment of Dr. Cathleen McHugh to the Data Management Council as an Office of the State Board of Education representative commencing July 1, 2023 and ending June 30, 2025.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to approve the reappointment of Scott Thomson to the Data Management Council as a rural school district representative commencing July 1, 2023 and ending June 30, 2025.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_



# Data Management Council Membership

March 2023

## Office of the Idaho State Board of Education

### Dr. Cathleen McHugh

*Chief Research Officer*  
Idaho State Board of Education  
Member since 2018  
Term: July 1, 2021 – June 30, 2023

### Chris Campbell

*Chief Technology Officer*  
Idaho State Board of Education  
Member since 2015  
Term: February 17, 2021 – June 30, 2023

## Public Postsecondary Institutions

### At-Large Institutions

#### Dr. Grace Anderson

*Vice President for Institutional Research,  
Planning, and Effectiveness*  
Lewis-Clark State College  
Member since 2019  
Term: July 1, 2021 – June 30, 2023

**VACANT POSITION**

### Community College

#### Thomas Sharpe

*Senior Research Analyst*  
College of Southern Idaho  
Member since 2021  
Term: July 1, 2022 – June 30, 2024

### Public Postsecondary Institution Registrar

#### Dr. Lindsey Brown

*University Registrar*  
University of Idaho  
Member since 2022  
Term: October 19, 2022 – June 30, 2023

## State Department of Education

### Ayaka Nukui

*Director of Accountability*  
State Department of Education  
Member since 2022  
Term: June 14, 2022 – June 30, 2024

 Council membership continued on second page

## K-12 School Districts

### At-Large School District

#### Dr. Spencer Barzee

*Superintendent*

West Side School District

Member since 2021

Term: April 21, 2021 – June 30, 2023

### Rural District

#### Scott Thomson

*Executive Director*

North Idaho STEM Charter Academy

Member since 2019

Term: July 1, 2021 – June 30, 2023

### Urban District

#### Matthew Rauch

*Database Manager*

Kuna School District

Member since 2015

Term: July 1, 2022 – June 30, 2024

## Division of Career Technical Education

#### Heather Luchte

*Director, Performance Management*

Division of Career Technical Education

Member since 2014

Term: July 1, 2021 – June 30, 2023

## Department of Labor

#### Georgia Smith

*Deputy Director of Communications, Research and Determination Services*

Idaho Department of Labor

Member since 2014

Term: July 1, 2022 – June 30, 2024

## At-Large Representative

#### Todd King

*Education Data Systems Reporting Manager*

Idaho State Board of Education

Member since 2013

Term: February 17, 2021 – June 30, 2023



**BOISE STATE UNIVERSITY**

**INSTITUTIONAL EFFECTIVENESS**

November 11, 2022

Dr. Cathleen McHugh  
Chief Research Officer  
Office of the Idaho State Board of Education  
Boise, Idaho 83702

Dear Dr. McHugh,

I am writing to express my interest in serving as a higher education representative on the Data Management Council (DMC). I am currently in my tenth year at Boise State University where I serve as the senior executive director of institutional effectiveness.

My work has intersected closely with the work of the DMC in a number of ways outlined briefly below.

- My position responsibilities include oversight of Boise State's contribution to the longitudinal data system (PMAP) as well as regular reporting to the ISBOE.
- I have been an active participant in the development, implementation, and use of the PMAP system. This has included everything from discussing data table structure and fields to data definitions and quality to testing reporting capabilities.
- In 2015, I was awarded an SLDS grant on student achievement, so I had an opportunity for first-hand use of the longitudinal data as the principal investigator on a large research study.
- I previously served as a member of the DMC for approximately three and a half years, completing a vacated position of another member then completing one term of my own. While on the DMC, I served on the data masking subcommittee to research policy and best practices and make recommendations to the full council. I also served as DMC secretary for one year.

With a Ph.D. in educational leadership and policy studies and a 30-year history working in higher education, my background affords me with an understanding of the complex and varied issues within and across institutions of higher education. I bring a combination of analytical and communication skills that enable me to examine complex issues from multiple perspectives and communicate with diverse stakeholders. I have also served as a leader in the Association for Institutional Research where I served on the Board of Directors for three years.

I appreciate your consideration for this role. As I have demonstrated through my participation in the state IR Director's group, you could expect me to be an engaged member that offers knowledge and experience in higher education and shares my steadfast commitment for effective use of data in decision-making while collaborating with the group to find solutions to critical issues. Please contact me if you have any questions or if I can provide additional information, 208.426.1614, shariellertson@boisestate.edu.

Sincerely,

Shari Ellertson, Ph.D.  
Senior Executive Director, Institutional Effectiveness

## SHARI L. ELLERTSON

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### PROFILE

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- Experienced public higher education professional with roles in administration, teaching, and research
- Supervisory, budgetary, and leadership experience
- Administrative experience in Executive Office, Academic Affairs, and Student Affairs
- Expertise in assessment, institutional effectiveness, and data-informed decision making
- Proven collaborator with strong ability to build positive relationships
- Excellent communication and listening skills, and ability to communicate across diverse audiences
- Strong record of scholarship – numerous publications and national and regional presentations
- Ability to analyze complex institutional issues and solve problems
- Respected and engaged leader in higher education professional communities

### EDUCATION

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- Doctor of Philosophy, Educational Leadership and Policy Studies (Higher Ed Admin),  
Iowa State University, Ames. 2004  
Dissertation: *Mid-career faculty involvement in learning communities: An exploration of outcomes and vitality*  
Advisor: John H. Schuh
- Master of Science, Counseling and Student Affairs, Moorhead State University, Moorhead, MN. 1998  
Thesis: *A comparison of views toward intelligence between at-risk students and students at-large*  
Advisor: William T. Packwood
- Bachelor of Science, Psychology, North Dakota State University, Fargo. 1991

### EXPERIENCE

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#### BOISE STATE UNIVERSITY

- Senior Executive Director, Institutional Effectiveness 02/2022 – present  
Director, Office of Institutional Research 01/2013 – 02/2022
- Lead a team of eight full-time staff plus two faculty associates with a focus on reporting and analyses to support University-level and Academic Affairs planning, evaluation, and effectiveness
  - Spearhead the development and implementation of the program assessment review process to meet the needs of institutional and programmatic continuous improvement and fulfill accreditation requirements
  - Implement and administer system for faculty activity reporting and evaluations (Faculty180), proposed associated policy updates, and regularly convened coordinating committee of academic administrators
  - Provide planning and data support for institutional and academic strategic initiatives examples including: program prioritization (both academic and administrative/support), strategic enrollment and retention, strategic planning, accreditation, the incentive-based budget model, etc.
  - Lead the University Data Governance Committee; develop policy and practice for data quality and governance
  - Develop effective office operations, including strategic plan, functional map, career progression matrix, job standards, and office policies and procedures; manage budgets of approximately \$1.1M
  - Foster collaboration and partnerships within Academic Affairs and across divisions of the university

#### TEAGLE ASSESSMENT SCHOLAR, Center of Inquiry, Wabash College 09/2010 – 07/2018

- Mission: “The Teagle Assessment Scholar Program recognizes, supports, and develops the capacity of gifted assessment leaders to work in campus communities with these cultural, historical, organizational, and economic factors in a way that allows evidence to have impact.”
- Served as facilitator/coach for multi-institution workshops and consulted with individual institutions working on various challenges or issues with teaching, learning, and outcomes assessment
- Served as a facilitator, data coach, and/or participant in TAS development workshops
- Advocated for increased community engagement and data into action in higher education; see complete list of TAS activities under Other Scholarly Contributions

**UNIVERSITY OF WISCONSIN-STEVENS POINT**

- Director of Policy Analysis and Planning, Office of the Chancellor 07/07 – 01/2012
- Advanced a culture of data-informed decision making at all levels to inform policy development and continuous improvement; provided high quality data analyses, interpretation, and reporting to meet needs of diverse stakeholders
  - Served on the Chancellor’s Cabinet; advised and assisted the Chancellor and Vice Chancellors on a variety of policy and institutional matters
  - Served on an interdisciplinary team in the four-year HLC assessment academy to transform institutional and program assessment and the general education program
  - Directed and managed the institutional research function, including: accountability reporting, institutional effectiveness and continuous improvement efforts, enrollment management research, and information management; supported strategic planning, assessment, and accreditation efforts; produced the annual accountability report, department performance indicators, institutional facts, etc.
  - Oversaw student grade appeals for the Office of the Provost
  - Supervised staff - institutional planner, limited-term research analyst, and student research assistants
  - Served as the institutional contact for UW-System data collection, HLC Annual Institutional Data Update, the Voluntary System of Accountability (VSA), and the National Survey of Student Engagement (NSSE) among other annual reports and surveys. Administered the institutional Survey Clearinghouse

- Visiting Assistant Professor & Assessment Consultant 08/06 – 05/07
- Led the development of comprehensive assessment within the Web and Digital Media Development program with an emphasis on student learning and educational program outcomes assessment. Conducted assessment activities for program evaluation of WDMD for the 5-year Joint Review, internal program review, and the accreditation self-study process. Served as an assessment resource person for colleagues.
  - Developed and taught *WDMD 346: Digital Portfolio Development*
  - Worked closely with the Department Chair on NSSE initiatives, student recruitment, and outreach efforts

- Assessment Consultant, Division of Student Affairs (.50 FTE; one-year consultancy) 08/05 – 05/06
- Promoted and facilitated the integration of student learning outcomes in Student Affairs units
  - Developed and presented assessment workshops for the purpose of capacity building/staff development
  - Consulted with Directors and Assessment Liaisons on individual departmental assessment plans and needs
  - Supported institutional accreditation efforts; collaborated with the co-chairs of the accreditation steering committee to present an assessment workshop for Academic Affairs

**IOWA STATE UNIVERSITY**

- Postdoctoral Research Associate, Research Institute for Studies in Education (RISE) 07/04 – 07/05
- Served as lead project evaluator for three major external clients: AgrowKnowledge: National Center for Agriscience and Technology Education; The National Foreign Language Resource Center, and The New Jersey Consortium for Assessing Performance Standards in Foreign Language Education
  - Served as evaluation team member for the following clients: Vertical Integration of Computer, Electrical, and Mechanical Engineering Education, College of Engineering; and Evaluation of the Master’s Program in Higher Education, College of Education
  - Designed and implemented evaluation plans; developed evaluation instruments; wrote reports; collaborated with colleagues on various assessment, evaluation, and research studies

- Instructor, Educational Leadership and Policy Studies
- Research and Evaluation 580 (Qualitative Research Techniques) Summer 2005
- Course purpose: to examine the history, philosophy, and processes of qualitative research, including epistemological and theoretical underpinnings of qualitative approaches
- Research and Evaluation 550 (Educational Research) – Co-Instructor Spring 2004
- Course purpose: to provide students with a fundamental understanding of the research process, including the nature of quantitative and qualitative research
- Higher Education 578 (Students in American Higher Education) – Teaching Assistant Fall 2003
- Course purpose: to examine the relationship between college students and institutional characteristics from the University Transformation period through contemporary times

- Administrative Graduate Assistant (.75 FTE), Learning Communities Divisions of Academic and Student Affairs 08/00 – 06/04
- Served as liaison to 50 learning communities (LCs) and their faculty/staff coordinators; served on the interdisciplinary Advisory Committee and four subcommittees

- o Chaired the University Learning Communities Assessment Subcommittee (2003) and co-chaired the Institute Subcommittee (2000-2004)
- o Developed and presented faculty/staff development workshops, discussions, and ongoing education
- o Collaborated with diverse faculty and staff to develop workshops and other initiatives, such as the service-learning mini-grants program, faculty survey, and the LC awards program
- o Wrote proposals, grants, and other documents for on- and off-campus distribution; received internal grants for marketing and recruitment and retention

#### **NORTH DAKOTA STATE UNIVERSITY**

Assistant Director for Organizations & Greek Life, Memorial Union 08/97 – 07/00

- o Administered the Greek Life program for 16 fraternities and sororities; advised Interfraternity and Panhellenic Councils and related Standards Boards; served as the institutional liaison to Greek headquarters, chapter advisors, faculty advisors, and visiting consultants and representatives; advised Rho Lambda
- o Administered the Student Organization Development Program for 200 organizations; advised Student Government Commission for Student Organizations; developed Idea Breaks, Advisor Leadership Challenge, and Involvement on the Road programs; developed and managed leadership resources
- o Served on the Campus Safety and Judicial Team; worked with judicial processes, the Code of Student Behavior, the Campus Security Act, and the Student-Life Database
- o Trained, supervised, and evaluated a .50 FTE graduate assistant; hired and managed 20 orientation leaders

Customer Service Coordinator & Box Office Manager, Memorial Union 10/96 – 07/97

- o Managed the MU services: Copy Shop, Graphics Shop, Information Desk, Check Cashing, and Ticket Office
- o Developed and administered service area budgets. Maintained detailed financial sales reports
- o Hired, trained, supervised, and evaluated a staff of 20-30 students and four student assistants

Instructor, University Studies 199 (Skills for Academic Success) 08/96 – 10/99

- o Developed and taught an eight-week academic skills course to 25-30 undergraduate students
- o Supervised undergraduate student peer mentors and integrated them into the course

Chemist I, Laboratory Technician III, Laboratory Technician II, College of Pharmacy 10/91 – 12/95

- o Developed and implemented methodology, protocols, and standard operating procedures (SOPs) for conducting pharmaceutical research projects on therapeutic drugs
- o Analyzed and evaluated data; wrote research reports submitted to study sponsors and to the FDA
- o Trained and supervised four full- and part-time laboratory technicians and assistants

#### **MINNESOTA STATE UNIVERSITY MOORHEAD**

Counseling and Personal Growth Center

Associate Supervisor, Supplemental Instruction (SI) Program 02/96 – 10/96

- o Interviewed, hired, trained, supervised, and evaluated 15 student leaders; served as a liaison to SI faculty and administration; collected and analyzed quantitative and qualitative data; assisted with grant requests, report writing, and budgets

Study Skills Assistant, Academic Fitness Program 09/95 – 05/96

- o Co-facilitated 8 sections of Academic Fitness class for students on academic probation; collected and analyzed program data; organized and co-wrote annual program report; helped increase the overall success rate to 82%

#### **SCHOLARSHIP**

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##### **Funded Sponsored Project**

Ellertson, S. (2015). The role of high schools in preparing students to select and succeed in STEM majors in college. Funded \$34,738 through the Research Grant on Student Achievement from the Idaho State Board of Education. Peer-reviewed.

##### **Publications**

Ellertson, S., & Schuh, J. H. (2007). Faculty development in student learning communities: Exploring the vitality of mid-career faculty participants. *To Improve the Academy*, 25, 298-313. (Refereed.)

Ellertson, S., & Schuh, J. H. (2002, October 9). Assessing programs, services, and other interventions targeted at a small number of students. *NASPA NetResults*. <http://www.naspa.org/netresults/article.cfm?ID=784> (members only access).



Ellertson, S. Expenditures on operation and maintenance of plant at America's most beautiful campuses. *Facilities Manager*, 17, September/October 2001.

Wei, Y., Nygard, G. A., Ellertson, S. L., & Khalil, S. K. W. (1995). Stereoselective disposition of hydroxychloroquine and its metabolites in rats. *Chirality*, 7, 598-604. (Refereed.)

#### Chapters in Monographs

Ellertson, S., & Thoennes, K. (2007). Reframing teaching and learning: Lessons from learning communities for Student Affairs. In E. L. Moore (Ed.) *Student affairs staff as teachers: Enhancing and developing this important role in professional practice* (pp. 35-46).

Ellertson, S., & Brooke, C. (2006). Expanding the community of learners through an on-campus Learning Communities Institute. In N. Simpson & J. Layne (Eds.) *Student learning communities, faculty learning communities, and faculty development* (pp. 47-62). Stillwater, OK: New Forums Press.

Huba, M. E., Ellertson, S., Cook, M. D., & Epperson, D. L. (2003). Assessment's role in transforming a grass-roots initiative into an institutionalized program: Evaluating and shaping learning communities at Iowa State University. In J. MacGregor (Ed.), *Assessing learning communities: Stories from five campuses*. Olympia, WA: The Evergreen State College, the Washington Center for Improving the Quality of Undergraduate Education, in cooperation with the American Association for Higher Education.

#### Technical Reports (not including reports from post-doctoral evaluation clients)

Brooke, C., & Ellertson, S. (2004). Faculty perceptions of learning activities and learning communities at Iowa State University. Ames, IA: Iowa State University.

Clayborne, H., Ellertson, S., Feldmann, M. L., Hensen, K. A., Saunders, K., & Woldt, J. L. (2003). ELPS Higher Education Master's Program outcomes assessment. Ames, IA: Iowa State University.

Ellertson, S. (2002). Academic performance policies at Iowa State University: A policy evaluation. Ames, IA: Iowa State University.

Ellertson, S. (2002). An evaluation of the Catt Associates Mentoring Project for the Carrie Chapman Catt Center for Women and Politics. Ames, IA: Iowa State University.

#### Other Scholarly Contributions

Ellertson, S. (2018). From professional development to professional responsibility: My journey to a new understanding. *eAIR Board Corner*: Association for Institutional Research.

Teagle Assessment Scholar (TAS), Center of Inquiry, Wabash College

09/2010 – 07/2018

\* January 2018: Participant, TAS development workshop, Taking Stock of Assessment, Center of Inquiry event at Trinity University, San Antonio

\* January 2016: Participant, TAS development workshop, Learning from Alumni, Center of Inquiry event at Trinity University, San Antonio

\* October 2015: Facilitator, multi-institution workshop, Making Assessment Work, Center of Inquiry Wabash College

\* July 2014: Participant, TAS development workshop, Storytelling in Assessment, Center of Inquiry event at Franklin Pierce University, Rindge, NH

\* January 2012: Keynote speaker and assessment workshop presenter/facilitator, University of Maine Fort Kent Campus Development Day

\* September 2011: Facilitator for TAS New Scholar development workshop, Center of Inquiry, Wabash College, Crawfordsville, IN

\* July 2011: Data coach for TAS development workshop, Making Sense of Institutional Quantitative Data, Center of Inquiry event at Franklin Pierce University, Rindge, NH

\* April 2011: Facilitator for multi-institution workshop, Using Evidence about Student Learning to Inform Faculty Development, Wabash National Study event at the University of Rhode Island

\* March 2011: Participant, TAS development workshop, Using Evidence to Improve Student Learning, Center of Inquiry Wabash College

\* October 2010: Facilitator for TAS New Scholar development workshop, Center of Inquiry, Wabash College

\* September 2010: Facilitator for multi-institution workshop, Wabash National Study 2.0 Kickoff Meeting, Center of Inquiry, Wabash College

Interviewed (2006, March 1) for front-page article, "How to recruit faculty to learning communities," *Student Affairs Leader* (formerly known as *On-Campus Report*), 34(5), 1-2.

Interviewed (2006, April) for article "Look to midcareer faculty for learning communities," *Academic Leader*, 22(4), 3.

**Presentations – National**

Ellertson, S., & Focarile, T. (May 2022). Activating IR-CTL partnerships to advance student learning. Association for Institutional Research Annual Forum, Phoenix.

Reder, M., Focarile, T., Ellertson, S., & Nugent, J. (November 2021). Assessment as educational development: Using evidence across traditional silos to improve student learning (Plenary Session). POD Network Annual Conference, Virtual.

Snyder, J., Preston, M., Miller, M., & Ellertson, S. (May 2021). Discipline-specific peer analyses for instructional costs and productivity. Association for Institutional Research Annual Forum, Virtual.

Appel, M., Fortman, M., Peters, E., Borden, P., Chow, T., Ellertson, S., et al. (May 2019). Ethics v.4.0: Refining our code for today's IR. Association for Institutional Research Annual Forum, Denver.

Borden, V., Chow, T., Ellertson, S., Hall, M., & Gravitt, S. (May 2019). AIR needs YOU! Leadership opportunities in AIR. Association for Institutional Research Annual Forum, Denver.

Ellertson, S., Peters, E., & Palucki Blake, L. (May 2018). hIRe: Strategies and challenges in hiring and mentoring IR staff. Association for Institutional Research Annual Forum, Orlando.

Ellertson, S., Champion, J., Chang, W. (May 2017). Using high school transcripts to model college STEM selection and success. Association for Institutional Research Annual Forum, Washington, DC.

Ellertson, S., Gansemer-Topf, A., and Kennedy-Phillips, L. (May 2016). Creating an authentic culture of assessment: Building institutional capacity to do assessment. Association for Institutional Research Annual Forum, New Orleans.

Odom, L., & Ellertson, S. (May 2016). Making sense of data governance: The evolution of a campus plan. Association for Institutional Research Annual Forum, New Orleans.

Ellertson, S., and Gansemer-Topf, A. (May 2015). How to write effective outcomes and teach others to do the same. Association for Institutional Research Annual Forum, Denver, CO.

Gansemer-Topf, A., Ellertson, S., Kennedy-Phillips, L., Saunders, K. (May 2015). Mentors in measurement: Building institutional capacity to conduct assessment. Pre-conference workshop, Association for Institutional Research Annual Forum, Denver, CO.

Pike, G., Ellertson, S., Atchison, E., Woosley, S. (May 2015). Invited panelist, graduate student session. Association for Institutional Research Annual Forum, Denver, CO.

Hinds, T., Rowen, C., & Ellertson, S. (May 2014). It's a dangerous business, Stepping out your door: IR and environmental scans. Association for Institutional Research Annual Forum, Orlando.

Ellertson, S., and Ward, S. (March 2012). Creative collaborations. Invited presentation for the American Association of State Colleges and Universities (AASCU) Communications Conference, Washington, DC.

Bailey, T., & Ellertson, S. (2011, October). Success and progress rates within the University of Wisconsin System. Invited presenter for webinar sponsored by the Association of Public and Land-Grant Universities (APLU) for the Voluntary System of Accountability.

Ellertson, S. (2011, June). Using data and program audits to build a profile of first-generation and low-income students. Invited featured speaker for web conference presented to the CIC/CLA Consortium Pathways Project, Council of Independent Colleges.

- Ellertson, S., & Ward, S. (2011, May). Speaking the language of data: Strengthening the relationship between institutional research and marketing communications. Program presented at The Forum of the Association for Institutional Research, Toronto.
- Ellertson, S., Kellogg, A., Ketchum-Ciftci, L., & Summers, S. (2010, March). Leaving a legacy: Creating a divisional assessment review process. Program presented at the Conference of the National Association of Student Personnel Administrators, Chicago, IL.
- Ellertson, S., & Schuh, J. H. (2006, March). Learning communities and faculty development: Implications for Student Affairs. Program presented at the Conference of the National Association of Student Personnel Administrators, Washington, DC.
- Ellertson, S., Kemis, M., & Padgitt, J. (2005, April). Evaluating AgrowKnowledge. Poster presented at the annual conference of the National Center for Agriscience and Technology Education, Ventura, CA.
- Ellertson, S., & Brown, B. (2004, May). The faculty experiences in learning communities. Program presented at the National Learning Communities Project Conference, Seattle, WA.
- O'Connor, J., Brooke, C., Gruenewald, D., Kendrick, G., & Ellertson, S. (2004, May). Learning communities in research universities. Program presented at the National Learning Communities Project Conference, Seattle, WA.
- Shonrock, D., Lindstrom, J., & Ellertson, S. (2003, November). Valuing the role of librarians and libraries in learning communities: Integration of information literacy and partnerships in learning communities. Program presented at the Learning Communities and Collaboration Conference, Indianapolis, IN.
- Ellertson, S., Gansemer-Topf, A., Clayborne, H., Ludeman, R., Reason, R., & Hamrick, F. (2003, April). 101 things nobody told me about getting my PhD. Program presented at the Convention of the American College Personnel Association, Minneapolis, MN.
- Ellertson, S., & Schuh, J. H. (2003, March). Strategies for assessing interventions targeted at a small number of participants. Program presented at the Conference of the National Association of Student Personnel Administrators, St. Louis, MO.
- Ellertson, S., & McGuire, S. P. (2002, March). Multiple voices bring academic performance policies to life. Program presented at the Convention of the American College Personnel Association, Long Beach, CA.
- Reason, R., Benjamin, M., Cullen, J., Ellertson, S., & Saunders, K.P. (2002, March). Senior student affairs officers' responses to the September 11 tragedies. Program presented at the Convention of the American College Personnel Association, Long Beach, CA.
- Presentations – State and Regional**
- Preston, M., Ellertson, S., & Miller, M. (2021, November). Costs of instruction: Peer analyses with case studies. North Eastern Association for Institutional Research Annual Conference, Virtual.
- Ellertson, S. (2014, September). A story of program prioritization: Process, metrics and lessons learned. Rocky Mountain Association for Institutional Research Conference, Coeur d'Alene, Idaho.
- Ellertson, S., & Ward, S. (2011, June). The language of data. Program presented at the IM. Comm. Conference, Oshkosh, WI.
- Davis, J., Davis, K., Ellertson, S., Sage, J., & Summers, G. (2011, March). Letting it flow: Collecting, analyzing, and disseminating general education data. Poster presented at the Annual Meeting of the Higher Learning Commission, Chicago.
- Ward, S., & Ellertson, S. (2010, December). Speaking the language of data by strengthening communications and institutional research partnerships. Program presented at the District V CASE Conference, Chicago, IL.
- Ellertson, S. (2009, November). Assessing and evaluating your alternative breaks program. Presenter at Drive-in Conference for Wisconsin Student Activities Professionals, Stevens Point, WI.

- Warren, D., & Ellertson, S. (2009, January). Is participation in a critical thinking course related to performance on a standardized critical thinking test? Program presented at the University of Wisconsin-Green Bay 13<sup>th</sup> Annual Faculty Development Conference, Green Bay.
- Ellertson, S. (2005, May). Faculty in action: What do faculty members gain from their learning community experience? Program presented at the Seventh Annual Learning Communities Institute, Iowa State University, Ames.
- Ellertson, S. (2004, December). Mid-career faculty involvement in learning communities: An exploration of outcomes and vitality. Poster presented at the annual Iowa Educational Research and Evaluation Conference, Waterloo.
- Brooke, C., & Ellertson, S. (2004, May). Engaging faculty in learning community work. Program presented at the Sixth Annual Learning Communities Institute, Iowa State University, Ames.
- Clayborne, H., Ellertson, S., Feldmann, M. L., Hensen, K. A., Saunders, K., & Woldt, J. L. (2003, December). Assessing the experiences of master's students from a formative perspective. Poster presented at the 25<sup>th</sup> annual conference of the Iowa Educational Research and Evaluation Conference, Ames.
- Brooke, C., & Ellertson, S. (2002, April). Challenges and opportunities of implementing campus-wide learning communities. Regional workshop (invited) presented for The Collaboration for the Advancement of Teaching and Learning, Moorhead, MN.
- Ellertson, S. (2001, May). Getting to know you: Simple exercises to promote group interaction. Program presented at the Third Annual Learning Communities Institute, Iowa State University, Ames.
- Ellertson, S. (2000, February). Doing it all and not going crazy. Program presented at the Regional Girl Scout Leaders Conference, Fargo, ND.
- Fisher, G., & Ellertson, S. (1999, November). The voyage of developing a comprehensive student employment program. Program presented at the Association of College Unions International, Region 9 Conference, Iowa State University, Ames.
- Oster-Aaland, L., & Ellertson, S. (1999, April). Making tracks: Influencing culture change in an orientation team. Program presented at the National Orientation Directors Association (NODA) Region 5 Conference, Northern State University, Aberdeen, SD.
- Ellertson, S. (1999, February). 1-Make a splash with your chapter scholarship program, and 2- Developing a personal mission statement. Programs presented at the Delta Upsilon Province 8 Conference, Fargo, ND.
- Ellertson, S., & Thull, J. (1998, November). Involvement on the road. Program presented at the Association of College Unions International, Region 9 Conference, University of Minnesota, Minneapolis.
- Pratt, R., Ferris, S., & Ellertson, S. (1996). Academic fitness: Developing academic proficiency and intellectual tenacity. Program presented at National Academic Advising Association Region 6 Conference, Fargo, ND.

#### **Institutional Presentations**

- Ellertson, S. (ongoing). Data informed decision-making. Presentation to the new academic leaders / department chairs. Offered through the Academic Leadership and Faculty Affairs unit.
- Ellertson, S. (2019). Assessment in University Foundations. Facilitator of three planning and work sessions for the General Education Committee of Faculty Senate.
- Ellertson, S. (2017). Data resources for Student Affairs. Presenter for the Division of Student Affairs professional development workshop series.
- Ellertson, S., Stieha, V., Focarile, T. (2015 to present). Academic program assessment workshop series in collaboration with the Center for Teaching and Learning.
- Ellertson, S. (2011). Writing Outcomes: Program, Service, and Learning. Presenter of on-campus workshop for the Division of Student Affairs.

- Ellertson, S., Estanich, M., and Sage, J. (2010). UWSP Assessment Academy, Part 2. Presenter for two-workshop series (Developing Curriculum Maps) sponsored by the Faculty Senate Assessment Subcommittee.
- DeHart, P., Ellertson, S., Sage, J., & Summers, G. (2010). UWSP Assessment Academy. Presenter for three-workshop series (Writing Learning Outcomes) sponsored by the Faculty Senate Assessment Subcommittee.
- Bondeson, S., Ellertson, S., Ploetz, P., & Shaw, P. (2007, August). Focus on Teaching: Overview of Backward Course Design and Development of Intended Learning Outcomes. Presenter and facilitator for New Faculty Orientation.
- Ellertson, S. (2007, June). Developing Intended Learning Outcomes and Measurable Assessments for Active Learning. Center for Academic Excellence and Student Engagement Summer Course Redesign Workshop.
- Ellertson, S. (2007, May). Developing Intended Learning Outcomes and Measurable Assessments for Collaborative Learning. Center for Academic Excellence and Student Engagement Summer Course Redesign Workshop.
- Ellertson, S. (2007, February). You Want Them to Learn *What?* Writing Effective Learning Outcomes. Presenter for Service-Learning Colloquium, University of Wisconsin-Stevens Point.
- Bondeson, S., Ellertson, S., & Mosier, R. E. (2006, February). Capturing Outcomes in Academic Programs: It's All about Learning! Presenter for Academic Affairs workshop, University of Wisconsin-Stevens Point.
- Ellertson, S. (2005, July; 2004, October). Qualitative Research and the Dissertation Process. Panelist for Higher Education 615H: Dissertation Seminar, Iowa State University, Ames.
- Ellertson, S. (2004, March). Qualitative Research. Guest lecturer and panelist for Research and Evaluation 550: Educational Research, Iowa State University, Ames.
- Ellertson, S., & Cook, M. (2003, February). Transforming Learning through Learning Communities. Guest lecturer for Higher Education 561: College Teaching, Iowa State University, Ames.
- Ellertson, S., & Cook, M. (2001, November). Writing in APA Style. Presenter for Dean of Students Office Graduate Student Professional Development Session, Iowa State University, Ames.
- Ellertson, S. (2001, June). Qualitative Research. Panelist for Research and Evaluation 580: Qualitative Research Techniques, Iowa State University, Ames.
- Ellertson, S. (2001, April). Projects Using the Integrated Postsecondary Educational Data System (IPEDS). Presenter for Research Seminar, Department of Educational Leadership and Policy Studies, Iowa State University, Ames.
- Ellertson, S. (2001, March). Using the Integrated Postsecondary Educational Data System (IPEDS). Panelist for Higher Education 667: Financing Higher Education, Iowa State University, Ames.
- Ellertson, S. (1999, January). Who are these Greeks anyway? Presented at the Residence Life Conference Day, North Dakota State University, Fargo, ND.
- Ellertson, S. (1998, April). Serving Others. Keynote address presented at the Theta Chi Parent's Weekend banquet.
- Ellertson, S. (1997, April). Developing your Personal Mission Statement. Presented at the Student Leadership Conference, North Dakota State University, Fargo, ND.
- Ellertson, S. (1996, August). Ranking, Reliability, and Rush: How do they fit together? Presented at the Kappa Alpha Theta Leadership Workshop.

## SERVICE AND LEADERSHIP

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**Idaho Statewide Data Management Council, Postsecondary Representative (2015 – 2018)**  
Secretary, 2017-18  
Data Masking Policy Working Group

**University of Wisconsin System**

Search Committee, Associate Vice President for Policy Analysis and Research, Spring 2010  
Institutional Accountability Report Working Group, 2009  
Partnerships Working Group, 2009  
Presenter, *Accountability in the UW System* (with S. Wilhelm), to the Board of Regents, October 2008

**Institutional**

*Boise State University*

Next Frontier Initiative Steering Committee (current)  
University Strategic Planning Council, 2020-2022  
University Program Prioritization Committee, 2013-14, 2020-21  
Strategic Enrollment and Retention Planning Research Committee (current)  
University Data Governance Committee, co-chair (current)  
Information Technology Planning Committee (current)  
Decision Support Subcommittee (current)  
Bronco Budget Committee (incentive-based budget model), 2015-16 and data team (current)  
CCA Momentum Pathways team, 2019  
Executive Enrollment Committee  
Teaching and Learning National Institute Teams  
\* Using Evidence for Improvement, 2018  
\* Learning Communities, 2016  
Student Affairs Program Prioritization Review Team, 2013-14

*University of Wisconsin-Stevens Point*

Pointer Compact Differential Tuition Committee, 2011-2012  
Enrollment Management Committee 2012  
Search Committee Chair, Financial Aid Advisor, 2012  
Search Committee, Executive Director of University Relations and Communication, 2011  
Strategic Planning Steering Committee, 2010-2012  
HLC Assessment Academy Team, 2008-2012  
Faculty Senate Assessment Subcommittee, 2007-2012  
Faculty Senate General Education Committee, 2011-2012  
University Marketing and Communications Advisory Group, 2008-2012  
Inclusive Excellence Leadership Team, 2009-2011  
Wisconsin Women in Higher Education Leadership (WWHEL) Campus Steering Committee, 2008-2011  
Division of Student Affairs Assessment Team, 2008-2011  
Academic Staff Council, 2008-2010  
Service-Learning Steering Committee, 2006-2007  
Greek Life Task Force, 2006-2007 and 2012  
Web and Digital Media Development Curriculum Committee, 2006-2007  
Division of Student Affairs Assessment Liaison Group, 2005-2006

*Iowa State University*

Learning Communities Advisory Committee, 2000-2004  
Learning Communities University Assessment Subcommittee, 2000-2004 (Chair, 2003-2004)  
Learning Communities Institute Subcommittee (Co-chair), 2000-2004  
Learning Communities Curriculum Development and Enhancement Subcommittee, 2000-2004  
Learning Communities Peer Mentor Subcommittee Member, 2000-2004  
College of Education Outcomes Assessment Committee, 2002-2004  
Department of Educational Leadership & Policy Studies Outcomes Assessment Committee, 2002-2004  
Department of ELPS Master's Program Outcomes Assessment Working Group, 2003  
Assessment Consultant, Catt Center for Women and Politics, Spring 2002  
Grievance Hearing Board, Office of the Provost, Summer 2001  
Service-Learning Task Force, 2000-2001

*North Dakota State University*

Campus Safety and Judicial Team, 1997-2000  
University Orientation Committee, 1997-2000  
Welcome Week Committee, 1997-2000  
Search Committee Member for Assistant Director of Multicultural Student Services, 2000

Code of Student Behavior Revisions Committee, 1999  
Critical Incidents Procedures Committee, 1999  
Chairperson, Assistant Director for Operations and Services Search Committee, 1999  
Phi Eta Sigma Scholarship Selection Committee, 1999  
Tapestry of Diverse Talents Selection Committee, 1998  
Greek Life Discussion Group, 1998-1999  
National Collegiate Alcohol Awareness Week Committee, 1997-1998  
Memorial Union Staff Development Committee, 1997-2000  
Who's Who Among Students in American Colleges & Universities Selection Committee, 1997  
Memorial Union Student Employee Handbook Committee, 1996

### Professional Involvement

Association for Institutional Research (AIR), Current member

- o Board of Directors Member-at-Large, 2017-2020
- o Secretary, Board of Directors, 2018-2020
- o Publications Peer Reviewer
- o eAIR Advisory Committee
- o AIR Forum Track Assessment Committee, 2010-11

Association of Public and Land Grant Universities (APLU)

- o Voluntary System of Accountability Work Group, 2013-2015

Rocky Mountain Association for Institutional Research

- o Conference Sponsorship Coordinator, 2014 Conference, Coeur d'Alene, ID

Association of Institutional Research for the Upper Midwest (AIRUM) – Member, 2007-2012

Mentor for student in the Edgewood College Doctor of Education program, 2009-2011

Association for the Study of Higher Education – Previous member /

National Association of Student Personnel Administrators – Previous member

- o Conference Program Reviewer, 2004, 2006

American College Personnel Association

- o Directorate Member, Commission for Academic Support in Higher Education, 2002-2005
- o AIDS Auction Volunteer, 1999

Iowa Educational Research and Evaluation Association – Member, 2003-2005

Association of College Unions International – Member, 1996-2000

- o Facilitator, National Institute for Leadership Education and Development, 1999. Indiana University, Bloomington.
- o Facilitator, Student Leadership Initiative, 1997. Region 9 Conference, Southwest State University, Marshall, MN.

Association of Fraternity Advisors – Member, 1997-2000

Fargo/Moorhead Women in Science – Member, 1992-1995

### Community

United Way LIFE Report for Portage County, Education Committee, 2012  
Women's Fund Steering Committee, Portage County, 2012  
Lake Agassiz Habitat for Humanity, Family Advocate, Family Selection and Fundraising Committees, 1997-2000  
Kappa Alpha Theta Women's Fraternity, National Educational Instructor (1997-2000), Advisory Board Chair and Member (1992-1996), and Co-chair of Alumni Scholarship Fundraising Campaign (1994)

### HONORS

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Northwest Commission on Colleges and Universities (NWCCU) Fellowship Program, 2019-2021  
Teagle Assessment Scholar, Wabash National Study, Center of Inquiry, 2010-2018  
Learning Communities Champion Award, Iowa State University, 2004  
Ebbers Dissertation Fellowship, Iowa State University, 2003  
Kappa Alpha Theta International Lambert Graduate Scholarship Recipient (top honor), 2001  
Wakonse Teaching Institute Fellow, Iowa State University, 2001  
NDSU Outstanding Student Organization Advisor, 2000 – nominated and selected by students  
Honorary Member, Phi Eta Sigma, North Dakota State University, 1999  
Phi Kappa Phi, Moorhead State University, inducted 1998  
Kappa Alpha Theta International Sue Farrell Supple Graduate Scholarship Recipient, 1996

11/07/22

Dear Data Management Council,

I am writing to express my interest in the open seat on the Data Management Council. I have extensive experience as a data analyst and Director at the University of Idaho. I have an educational background in statistics and economics.

Over the years, I've had the opportunity to interact with the Board through the IR Director's meetings and now the monthly meetings. Much like data analysis, they serve to tie the inherent intent of Board requests to the data itself. Meeting with IR and Board representatives across the state with shared goals and common tasks has been a wonderful professional experience. The resulting data analysis has been more enriching and directed knowing the underlying thought processes.

The DMC can further enrich my understanding of Board concerns and help me better serve my institution. I believe I have the experience and desire necessary to be an asset to this group. Further, being more closely involved in the DMC will increase my knowledge of how the SLDS data from the UI is used as well as how research requests could tie to institutional data needs.

I look forward to learning more about the SBOE and the DMC, especially the research results tied to such requests. Thank-you for your consideration.

Regards,

Wesley McClintick  
IR Director  
Institutional Research  
University of Idaho  
P.O. Box 443163  
Moscow, ID 83844-3163  
(208) 885-7994



2250 N Highway 95 #5, MOSCOW, ID 83843  
(208) 631-4878  
MCCLINTICK@UIDAHO.EDU

## WESLEY MCCLINTICK

**PROFILE** I enjoy finding solutions to complex statistical and programming problems that provide efficient process management and correct information.

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**EXPERIENCE** Director, Institutional Research (March 2020-Current)  
Institutional Research Coordinator and Senior Analyst (May 2018 – March 2020)  
Senior Programmer Analyst (2015-May 2018)  
State Longitudinal Data System Analyst (May 2014-2015)  
TA/Tutoring (2012-2014)

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**SKILLS / HISTORY** **SAS/R/SQL/BRIO/TABLEAU/VISUAL ANALYTICS:** Extensive SAS experience beginning AY 2003:

- Completion of the SAS programming course series (STAT 404 Sections1-3).
- Retrieval, manipulation, and analysis of Census Bureau data for Professor Abelardo Rodriguez (2010-2011).
- A complete reprogramming/logic transfer/restructuring of the Student Evaluation of Teaching reports from BRIO to SAS using SQL joins and subqueries, impacting all departments and faculty University-wide:
  - Promotion and Tenure Packets, automating MUSA consolidated reports, customized reports for the Honors Program and Department Heads on-demand, and improved data quality by debugging errors.
- Programmed the automation and completion of the state-required SLDS data uploads:
  - Create and maintain parameter-driven program to output 11 standardized Excel files to replace custom coding, covering enrollment, degree counts, test scores, and financial aid data.
  - Collaborated and debugged with other UI offices such as Student Financial Aid Office and the Registrar's Office to ensure data precision.
- Systematically and regularly identify and improve data quality control procedures across campus by working collaboratively with the Registrar's Office, Financial Aid, the Budget Office, and Advising.
  - Identified and programmed error reports for students with identical double majors due to data entry error and worked with the Registrar to fix them.

- Programmed a report to identify students who changed majors, but their advisor had not been updated (for UI Advising)
- Identified and corrected improper exposure of Social Security Numbers in a secured table.
- Assisted in developing a crosswalk with Budget office between finance and academic departments.
- Debugged, proofed, and maintained high visibility external surveys previously completed by IR Director and Associate Director. This entails in-depth investigation and understanding of data sources, their interaction, and relationships in order to publicize and report UI data accurately.
- Daily programming improvements for Institutional Research & Assessment via
  - Programming of utility macros for day-to-day office level operations in procedure and system development to aid programming by office personnel. Including identifying the key for a table within a relational database, creating a missing values reports, searching through validation tables, etc.
  - Researched and implemented a change of connection drivers from ODBC to ORACLE which allowed standard SAS code (e.g. PROC CONTENTS) to work on database tables (BANNER) and greatly improved speed and connectivity.
  - Researched and programmed Registrar functions into SAS code to facilitate data exchange between IR and the Registrar.
- Wrote program to create a standardized degrees table to correct and restructure the degree data from the outdated student data warehouse - which no longer contained all degrees majors.
- Developed database and subsequently designed Tableau reports for data dissemination for departmental External Program Review and Program Prioritization.
- Developed dashboards within SAS Visual Analytics for executive leadership, including a process to transfer data to the UNIX servers now used by the entire IR office.

**R Programming Language & Data Visualization:** 5 years experience programming in R including classic and Bayesian statistics, Markov Chain Monte Carlo techniques, solving differential equations, and designing custom graphics that greatly simplify complex data.

**Teaching & Communicating Statistical Concepts.** 3 years teaching and consulting with students and faculty within the Statistics Assistant Center (SAC) and Statistical Consulting Center (SCC).

**Statistical Consulting:** 2 years taking on an incredibly diverse range of problems as a Statistical Consultant within the SCC and independently

EDUCATION

UNIVERSITY OF IDAHO, MOSCOW ID

**BACHELOR OF SCIENCE; POLITICAL SCIENCE AND ECONOMICS 2002**

Political Science Honor Society, Economics Honor Society

**MASTER OF SCIENCE: APPLIED ECONOMICS 2008**

1st Place VIEW competition: Led a group of five undergraduate and graduate students to conceive, write, and present a business plan based on my Masters' thesis.

**MASTER OF SCIENCE: STATISTICAL SCIENCE 2016**

Focused on obtaining as wide-ranging of a statistical education as possible, both in terms of content and abilities, i.e., programming, mathematical statistics, spatial analysis (map-based statistics) and ecological modeling (differential equations). I have previously studied time series and mixed effects models for data varying over time

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PROFESSIONAL  
DEVELOPMENT

SAS Global Conference 2016, 2015. Western Users of SAS Conference (WUSS) 2016,2015,2014. American Statistical Association Membership 2014, 2015. Rocky Mountain Association of Institutional Research (RMAIR) Conference and Presentation 2015, 2016. Mastering Outlook PDL Course 2017. Excel Macros in VBA PDL Course 2016. Effective Communication Skills PDL Course 2016. State Board of Education (SBOE) IR Directors Meeting 2015, 2016, 2017. Enterprise Guide for SAS Programmers SAS course 2017. Visual Analytics: Report Viewer, SAS Class 2016. Visual Analytics: Data Explorer, SAS class 2016. Understanding Management Console, SAS Class 2017. Statistics in Enterprise Guide, SAS Class 2017.

**From:** Grace L. Anderson <glanderson@lcsc.edu>  
**Sent:** Monday, March 6, 2023 11:00 AM  
**To:** Cathleen McHugh <Cathleen.McHugh@osbe.idaho.gov>  
**Cc:** Doug Armstrong <doug.armstrong@osbe.idaho.gov>  
**Subject:** RE: DMC Schedule / Reappointment

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Thank you, Cathleen: I am interested in being reappointed to the DMC.

Thank you.  
Grace

Grace L. Anderson, Ph.D.  
Vice President for Institutional Research, Planning & Effectiveness  
Lewis-Clark State College  
[glanderson@lcsc.edu](mailto:glanderson@lcsc.edu)  
208-792-2456



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**From:** Brown, Lindsey (lindseybrown@uidaho.edu) <lindseybrown@uidaho.edu>  
**Sent:** Monday, March 6, 2023 10:14 AM  
**To:** Doug Armstrong <doug.armstrong@osbe.idaho.gov>  
**Subject:** RE: DMC Schedule / Reappointment

Doug,

I would be interested in serving another year.

Thanks,  
Lindsey

**LINDSEY BROWN**, Ph.D.  
University Registrar

Office of the Registrar  
Office: Pitman Center 119K  
[lindseybrown@uidaho.edu](mailto:lindseybrown@uidaho.edu)  
[uidaho.edu/registrar](http://uidaho.edu/registrar)  
208-885-5566  
875 Perimeter Drive MS 4260 | Moscow ID 83844-4260



The Registrar's Office is hiring! [Graduation & Commencement Specialist](#) [Transfer & Enrollment Services Specialist](#) [Classroom Scheduling & Enrollment Services Specialist](#) [Academic Publications and Curriculum Coordinator](#)

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**From:** Chris Campbell <cacampbell@sde.idaho.gov>  
**Sent:** Monday, March 6, 2023 10:09 AM  
**To:** Doug Armstrong <doug.armstrong@osbe.idaho.gov>  
**Cc:** Cathleen McHugh <Cathleen.McHugh@osbe.idaho.gov>  
**Subject:** RE: DMC Schedule / Reappointment

Yes, I am willing to continue serving.

**From:** Todd M. King <tking@sde.idaho.gov>  
**Sent:** Tuesday, March 7, 2023 4:49 PM  
**To:** Doug Armstrong <doug.armstrong@osbe.idaho.gov>  
**Cc:** SCOTT R THOMSON <STHOMSON@NORTHIDAHOSTEM.ORG>  
**Subject:** RE: DMC Reappointment

Hi Doug,

Please consider this as an official response, regarding my interest in being reappointed to the Data Management Council.

Thank you

*Todd M. King*

*Education Data Systems Reporting Manager*  
(208) 332-6937



[ISEE Idaho System for Educational Excellence | Idaho State Board of Education](#)

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**From:** Heather Luchte <Heather.Luchte@cte.idaho.gov>  
**Sent:** Tuesday, March 7, 2023 2:20 PM  
**To:** Cathleen McHugh <Cathleen.McHugh@osbe.idaho.gov>  
**Cc:** Doug Armstrong <doug.armstrong@osbe.idaho.gov>  
**Subject:** RE: DMC Schedule / Reappointment

I'm happy to renew my term.

For May 23, I may have a conflict for a conference, but also trying to get out of it. ☹️

**From:** Cathleen McHugh <Cathleen.McHugh@osbe.idaho.gov>  
**Sent:** Monday, March 6, 2023 10:22 AM  
**To:** Doug Armstrong <doug.armstrong@osbe.idaho.gov>  
**Subject:** Reappointment to Data Management Council

This is to confirm my interest in being reappointed to the Data Management Council.

*Dr. Cathleen McHugh*  
Chief Research Officer  
[cathleen.mchugh@osbe.idaho.gov](mailto:cathleen.mchugh@osbe.idaho.gov)  
Tel: (208) 332-1572



[www.boardofed.idaho.gov](http://www.boardofed.idaho.gov)

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**From:** Scott Thomson <sthomson@northidahostem.org>  
**Sent:** Tuesday, March 7, 2023 2:28 PM  
**To:** Doug Armstrong <doug.armstrong@osbe.idaho.gov>  
**Cc:** Todd King <tking@sde.idaho.gov>  
**Subject:** Re: DMC Reappointment

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Yes I am.  
Thank you.

Scott Thomson  
Executive Director  
STEM Charter Academy  
A Free K-12 Public School of Choice

***Be optimistic, It costs the same!***

On Tue, Mar 7, 2023 at 1:10 PM Doug Armstrong <[doug.armstrong@osbe.idaho.gov](mailto:doug.armstrong@osbe.idaho.gov)> wrote:

I just want to verify that you are interested in being reappointed to the Data Management Council.

**Doug Armstrong**

Business Analyst – Postsecondary Measures of Academic Progress (PMAP)



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**CONSENT**  
**APRIL 25, 2023**

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**SUBJECT**

Idaho Indian Education Committee Appointments

**REFERENCE**

June 20, 2019	The Board approved the appointment of Dr. Leslie Webb, Mr. Jaime Barajas-Zepeda, and Ms. Effie Hernandez.
February 13, 2020	The Board approved the appointment of Mr. Jesse LaSarte.
April 16, 2020	The Board approved the appointment of Dr. Rex Force.
August 26, 2020	The Board approved the appointment of Dr. Mary Jane Miles.
April 2021	The Board approved the reappointments for Mr. Sobotta, Dr. Force, Ms. James, Dr. Meyer, and Mr. LaSarte.
June 2021	The Board approved the reappointment of Ms. Tina Strong.
August 2021	The Board approved the appointment of Ms. Shirley Allman.
October 2021	The Board approved the appointment of Dr. Eric Scott.
February 2022	The Board approved the appointment of Dr. Jean McGivney-Burelle, Dr. Kassie Silvas, and Ms. Desi Moses.
April 2022	The Board approved the reappointments for Ms. Hernandez, Dr. Bisbee, and Mr. Edmo.
October 2022	The Board approved the appointments for Mr. LaSarte, Ms. Porter, and Dr. Thornes.
February 2023	The Board approved the appointment of Ms. Ballard.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies and Procedures, Section I.P.

**BACKGROUND/DISCUSSION**

The Idaho Indian Education Committee serves as an advisory committee to the State Board of Education (Board) and the State Department of Education (Department) on educational issues and how they impact Idaho's American Indian student population. The committee also serves as a link between Idaho's American Indian tribes. Pursuant to Board Policy I.P., the Idaho Indian Education Committee consists of 19 members appointed by the Board. Each member serves a term of five years. Appointments to vacant positions during a previous incumbent's term are filled for the remainder of the open term. The membership consists of:

- One representative from each of the eight public postsecondary institutions
  - Nominations are submitted from the institution president
- One representative from each of the five tribal chairs or their designee
- One representative from each of the five tribal education departments

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- One representative from each of the two Bureau of Indian Education schools
    - Representatives must be a school board member, administrator, or designee
  - One representative from the State Board of Education
- All members are voting members.

Members serve five-year terms and may be reappointed at the end of each term. Terms run from July 1 of the appointing year to June 30 of the year they expire.

**IMPACT**

The proposed appointments will add two members to fill the new at-large positions on the committee, reappoint two representatives from the Nez Perce Tribe and replace representatives for College of Southern Idaho.

**ATTACHMENTS**

- Attachment 1 – Current Committee Membership
- Attachment 2 – At-large nominations
- Attachment 3 – College of Southern Idaho nomination
- Attachment 4 – Nez Perce Tribe nominations

**BOARD STAFF COMMENTS AND RECOMMENDATIONS**

In April 2022, the Board approved amendments to Board Policy I.P, Idaho Indian Education Committee that expanded the membership to include two at-large positions on the committee. The purpose is to have additional expertise on a consistent and ongoing basis as the committee works on educational issues impacting American Indian students across the K-20 system. The committee developed a process for soliciting and screening nominations based on criteria and a scoring rubric. The process resulted in three submissions from Dr. David Aiken, Superintendent, Lapwai School District; Ms. Jessica Matsaw with University of Idaho's Indigenous Knowledge for Effective Education Program; and Ms. Chrystna Toneekia Hernandez from the Owhyee-Combined School. Based on final results, the Idaho Indian Education Committee is nominating Dr. David Aiken and Ms. Jessica Matsaw for appointment by the Board to the Indian Education Committee.

Additionally, there are four individuals whose terms are set to expire June 30, 2023. Mr. Jason Ostrowski, representing the College of Southern Idaho will not be renewing his term. President Dean Fisher will replace Mr. Ostrowski as CSI's representative.

Ms. Joyce McFarland representing the Nez Perce Tribal Education Department has expressed interest in continuing her service on the committee and Ms. Shirley Allman, serving as the Nez Perce Tribal Executive Committee's representative has also expressed interest in continuing her service on the committee.

Letters of support for all six individuals are included. If approved, each person will serve a new five-year term to run from July 1, 2023 through June 30, 2028. These

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nominations were shared with the Idaho Indian Education Committee at its March 3, 2023 meeting and the committee recommends approval of the appointments as presented.

Staff recommends approval.

**BOARD ACTION**

I move to appoint Dr. David Aiken and Ms. Jessica Matsaw, representing the at-large positions, to the Idaho Indian Education Committee effective July 1, 2023 and expiring June 30, 2028.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to appoint Dr. Dean Fisher, representing College of Southern Idaho to the Idaho Indian Education Committee effective July 1, 2023 and expiring June 30, 2028.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

I move to reappoint Ms. Shirley Allman, representing Nez Perce Tribal chair, and Ms. Joyce McFarland, representing Nez Perce Tribal Education Department to the Idaho Indian Education Committee effective July 1, 2023 and expiring June 30, 2028.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**STATE BOARD OF EDUCATION  
Idaho Indian Education Committee**

**Tribal Chair or Designee**

**Dr. Chris Meyer** is the Director of Education for the Coeur d'Alene Tribal Education Department and serves as the Tribal Chairperson's designee for the Coeur d'Alene Tribe. Term: July 1, 2021 – June 30, 2026.

**Shirley J. Allman** is the Nez Perce Tribal Executive committee representative and serves as the Tribal Chairperson's designee. Term: July 1, 2023 – June 30, 2028. **Pending Board approval.**

**Jennifer Porter** is the Tribal Chairperson for the Kootenai Tribe of Idaho and serves as their Tribal Chair representative. Term: October 19, 2022 – June 30, 2027.

**Ladd Edmo** is a member of the Fort Hall Business Council and serves as their Tribal Chairperson representative. Term: July 1, 2022 - June 30, 2027.

**Pending Recommendation** - Tribal Chairperson's designee for the Shoshone-Paiute Tribes.

**Tribal Education Department Representative**

**Jessica James** is the Tribal Education Program Manager for the Shoshone-Bannock Tribes and serves as their Tribal Education Department representative. Term: July 1, 2021 – June 30, 2026.

**Joyce McFarland** is the Education Manager for the Nez Perce Tribe and serves as their Tribal Education Department representative. Term: July 1, 2023 – June 30, 2028. **Pending Board approval.**

**Jesse LaSarte** is the Family Engagement Specialist for the Coeur d'Alene Tribe and serves as their Tribal Education Department representative. Term: October 20, 2022 – June 30, 2026.

**Pending Recommendation** – Tribal Education Department representative for the Shoshone-Paiute Tribes.

**Pending Recommendation** – Tribal Education Department representative for the Kootenai Tribe.

**Bureau of Indian Education Representatives**

**Allen Mayo** is the Bureau of Indian Education school representative. Term: July 1, 2023 – June 30, 2028. **Pending Board approval.**

**Tina Strong** is the Bureau of Indian Education school representative. Term: July 1, 2021 – June 30, 2026.

**At-large Members**

**Dr. David Aiken** is the Superintendent, Lapwai School District. Term: July 1, 2023 – June 30, 2028. **Pending Board approval.**

**Jessica Matsaw** is with the University of Idaho's Indigenous Knowledge for Effective Educators program. Term July 1, 2023 – June 30, 2028. **Pending Board approval.**

**State Board of Education Representative**

**Dr. Linda Clark** is the State Board of Education member of the Indian Education Committee.

**Institutions of Higher Education Representatives**

**Jaime Barajas-Zepeda** is the Assistant Director of Admissions and Recruitment at the College of Western Idaho. Term: immediately - June 30, 2024.

**Bob Sobotta, Jr.** is the Director for Native American, Minority, and Veteran's Services at Lewis-Clark State College. Term: July 1, 2021 – June 30, 2026.

**Dr. Jean McGivney-Burelle** is the Dean of the College of Education at Idaho State University. Term: February 17, 2022 – June 30, 2026.

**Dr. Yolanda Bisbee** is the Chief Diversity Officer and Executive Director of Tribal Relations at the University of Idaho. Term: July 1, 2022 – June 30, 2027.

**Effie Hernandez** is the Multicultural Coordinator at College of Eastern Idaho. Term: July 1, 2012 – June 30, 2027.

**Dr. Dean Fisher** is the President at College of Southern Idaho. Term: July 1, 2023 - June 30, 2028. **Pending Board approval.**

**Dr. Tim Thornes** – Interim chair, Department of Linguistics at Boise State University. Term: October 19, 2022 – June 30, 2027.

**Ms. Gail Ballard** is the Associate Dean of Instruction at North Idaho College. Term: February 15, 2023 – June 30, 2027.



March 17, 2023

Mr. Matt Freeman  
Executive Director  
Idaho State Board of Education  
650 West State Street  
3<sup>rd</sup> Floor  
Boise, ID 83720

Dear Executive Director Freeman:

This letter confirms my intent to serve as the designee from the College of Southern Idaho on the Indican Education Committee. Educational opportunities for our Natives and assuring that the ways that we support their access respect tribal cultures and traditions is important to me. As you already know, my home state has thirty-nine federally-recognized tribes resident in the state, and I have an affiliation with one tribe.

Should you have any questions, please let me know.

Best,

A handwritten signature in black ink, appearing to read 'L. Fisher', is written over a large, faint watermark of the College of Southern Idaho seal. The seal features a central figure holding a torch and a book, surrounded by the text 'COLLEGE OF SOUTHERN IDAHO' and the year '1965'.

Dr. L. Dean Fisher  
President



## TRIBAL EXECUTIVE COMMITTEE

PO. BOX 305 • LAPWAI, IDAHO 83540 • (208) 843-2253

March 1, 2023

Bob Sobotta, Chair  
Idaho Indian Education Committee  
Idaho State Board of Education  
650 West State Street 3<sup>rd</sup> Floor  
Boise, ID 83702

re: Nez Perce Tribe Designated Representatives for the Idaho Indian Education Committee

Dear Mr. Sobotta:

On February 14, 2023, the Nez Perce Tribal Executive Committee appointed Secretary Shirley J. Allman and Ms. Joyce McFarland, Education Manager as the Nez Perce Tribe's designated representatives on the Idaho Indian Education Committee.

The Nez Perce Tribe appreciates the commitment of Secretary Allman and Ms. McFarland to the Idaho Indian Education Committee and believes that both will continue to represent this important work for Idaho's American Indian students.

Secretary Allman may be reached by phone at 208-621-3698 or by email at [SAJlman@nezperce.org](mailto:SAJlman@nezperce.org) and Ms. McFarland may be reached at 208-621-4610 or by email at [joycem@nezperce.org](mailto:joycem@nezperce.org). Thank you.

Sincerely,

A handwritten signature in blue ink that reads "Samuel N. Penney".

Samuel N. Penney,  
Chairman

**CONSENT**  
**APRIL 25, 2023**

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**STATE DEPARTMENT OF EDUCATION**

**SUBJECT**

Emergency Provisional Certificates Recommendations

**REFERENCE**

August 2022	Board approved three (2) provisional certificates for the 2022-2023 school year.
October 2022	Board approved seventy-six (76) provisional certificates for the 2022-2023 school year.
December 2022	Board approved (87) provisional certificates for the 2022-2023 school year.
February 2023	Board approved (31) provisional certificates for the 2022-2023 school year.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho Code § 33-1201 and § 33-1203

**BACKGROUND/DISCUSSION**

Fourteen (14) complete Emergency Provisional Certificate applications were received by the State Department of Education by March 7, 2023 including, Instructional and Occupational Specialist certificate applications from the school districts listed below. These applications for the 2022-23 school year were reviewed by the Certification Department of the State Department of Education using the state board approved Emergency Provisional Certificate Application Process. The Emergency Provisional Certificate allows a school district or charter school to request one-year certification/endorsement in an emergency situation for a candidate who does not hold the required Idaho certificate or endorsement to fill a position. While the candidate is under emergency provisional certification, no financial penalties will be assessed to the hiring district.

**Instructional and CTE Applications**

**Wilder School District #133**

**Applicant Name:** JoyInn Haylett

**Endorsement(s):** World Language Spanish 6-12

**College Training:** AA

**Declared Emergency Date:** 8/9/2022

**Hire/Assignment Date:** 8/10/2022

**Summary of Recruitment Efforts:** The Spanish teaching position was posted and advertised starting in June and up until the board declared an emergency in August, right before school started. There were no other qualified candidates that applied. The candidate has an AA in Spanish and is a fluent speaker. She was a para in the district and is familiar with parents and students.



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**Applicant Name:** Eric Lopez

**Endorsement(s):** Physical Education 6-12, Health 6-12

**College Training:** AA

**Declared Emergency Date:** 8/10/2022

**Hire/Assignment Date:** 8/9/2022

**Summary of Recruitment Efforts:** The PE teaching position was posted and advertised starting in June and up until the board declared an emergency in August, right before school started. There were no other qualified candidates that applied. The candidate has experience working in this position and is working towards his Physical Education teaching credential.

**Applicant Name:** Shanna Sorenson

**Endorsement(s):** English 6-12

**College Training:** 91 credit hours

**Declared Emergency Date:** 2/14/2023

**Hire/Assignment Date:** 2/13/2023

**Summary of Recruitment Efforts:** To meet the needs of the IFRA's growth, the school found a secondary English teacher was needed quickly. The board met on 2/14/23 and declared an emergency for the position. The candidate is a para in the school district at the IFRA and is finishing a teaching degree. She is familiar with the school's format, students, and staff. The school believes she will meet the needs of the students and school.

**Salmon River Joint School District #243**

**Applicant Name:** Miranda Boyd

**Endorsement(s):** All Subjects K-8

**College Training:** AA

**Declared Emergency Date:** 1/23/23

**Hire/Assignment Date:** 8/1/2023

**Summary of Recruitment Efforts:** The position was posted on the EdJobs website, district Facebook and the district website. Did not meet the student teaching requirements to qualify for the Content Specialist application.

**West Jefferson School District #251**

**Applicant Name:** Madison Robinson

**Endorsement(s):** All Subjects K-8

**College Training:** 122 credit hours

**Declared Emergency Date:** 3/8/2023

**Hire/Assignment Date:** 3/1/2023

**Summary of Recruitment Efforts:** A teacher resigned on 2/24/2023. After advertising the position there were only two applicants. Both were interviewed and it was decided that Ms. Robison was the best for the job.

**Jerome Joint School District #261**

**Applicant Name:** Halle Driscoll

**Endorsement(s):** All Subjects K-8

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**College Training:** 58 credit hours

**Declared Emergency Date:** 1/24/2023

**Hire/Assignment Date:** 1/16/2023

**Summary of Recruitment Efforts:** The candidate was hired due to the unfortunate resignation of a first-grade teacher. We had a first-grade teacher resign due to medical situation needing attention in NY. The position was posted in December and received one applicant. The candidate was the only applicant who applied. She was a current substitute and is making progress towards her teaching degree. She is doing an excellent job and the students are very responsive.

**Applicant Name:** Sara Perry

**Endorsement(s):** All Subjects K-8

**College Training:** 151 credit hours

**Declared Emergency Date:** 1/24/2023

**Hire/Assignment Date:** 1/16/2023

**Summary of Recruitment Efforts:** Replacement of staff member who resigned due to medical conditions. The position was posted in November and received two applicants. Both applicants would have been provisional applications. The current candidate was chosen due to being a para in the school district. She has been doing a great job and the students have been very receptive.

**South Lemhi School District #292**

**Applicant Name:** Chandra Day

**Endorsement(s):** CTE Agriculture Science and Technology

**College Training:** AA

**Declared Emergency Date:** 1/17/2023

**Hire/Assignment Date:** 1/23/2023

**Summary of Recruitment Efforts:** A teacher resigned mid-year. The board voted to amend the schedule to absorb the class taught by the previous teacher. The teaching position (ag teacher) was opened to be posted. Before the position was posted, word of mouth traveled through the community which reached the current candidate whom applied and was hired as of January 23rd. The schedule returned to the original classes so the school can finish out the year with offered courses.

**Lewiston Independent School District #340**

**Applicant Name:** Carli Ahlers

**Endorsement(s):** Mathematics 6-12

**College Training:** 106 credit hours

**Declared Emergency Date:** 2/13/2023

**Hire/Assignment Date:** 1/24/23

**Summary of Recruitment Efforts:** Significant number of math teachers left their positions in the 21-22 school year. This resulted in numerous vacancies at the high school. Most positions were able to be filled during the 22-23 school year, but still left a few open positions. This resulted in teachers using their prep hour during the first semester. Students needs are no longer being met, requiring a new position

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to be filled. The current candidate was one of two applicants and was the most qualified. She is finishing up her teaching program.

**Fruitland School District #373**

**Applicant Name:** Caleb Ziegler

**Endorsement(s):** Social Studies 6-12

**College Training:** BS

**Declared Emergency Date:** 1/18/2023

**Hire/Assignment Date:** 1/6/2023

**Summary of Recruitment Efforts:** The vacancy was advertised beginning October 27, 2022 on the district website, in the building, Idaho EdJobs and to several universities through Handshake. One applicant was received and the position was offered, but then backed out. The current candidate was the second application received. He was interviewed and accepted the position.

**Teton School District #401**

**Applicant Name:** Alissa Giannini

**Endorsement(s):** All Subjects K-8

**College Training:** BA

**Declared Emergency Date:** 10/10/2022

**Hire/Assignment Date:** 8/26/2022

**Summary of Recruitment Efforts:** Did not meet the point rubric for the CS application. Only one decent candidate applied in the two months it had been open (end of June through August). The position was opened as an ELA position and no one applied. The school had one other candidate apply, who had previously not been rehired by the district, and who had been interviewed for other positions in previous year but who they did not hire. Of the two the current candidate was the only qualified candidate, who the team felt comfortable hiring to fill the position. If Alissa had not applied on the Friday before school, the district would have needed to find a sub, and switch the class to online.

**Applicant Name:** Joseph Grant

**Endorsement(s):** Mathematics 6-12

**College Training:** BA

**Declared Emergency Date:** 1/9/2023

**Hire/Assignment Date:** 8/22/2022

**Summary of Recruitment Efforts:** The position was opened throughout the entire Summer. No other applicants applied. The school felt he was well qualified with his degree in Statistics.

**Buhl School District #412**

**Applicant Name:** Kenneth Sutton

**Endorsement(s):** CTE Automotive Maintenance

**College Training:** Industry Certificate

**Declared Emergency Date:** 2/23/2023

**Hire/Assignment Date:** 2/1/2023

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**Summary of Recruitment Efforts:** The current teacher has been placed in hospice care. The candidate is graduate of the auto program in which the current teacher taught. The current teacher has requested the auto program remain running after he is gone. A retired CTE instructor has agreed to mentor the candidate.

**Xavier Charter School #462**

**Applicant Name:** Darla Ridenour

**Endorsement(s):** Physical Education K-12

**College Training:** AA

**Declared Emergency Date:** 7/11/2022

**Hire/Assignment Date:** 7/11/2022

**Summary of Recruitment Efforts:** The position was posted in April of 2022 and reopened until July 2022 when the board declared an emergency. The school had a miscommunication between roles of school personnel. There was turnover within the front office and the individual that was tasked with sending applications to state was under the impression they would not assume the role until 2023-2024. Several applications were not submitted to the state during the transition of roles. The school realized the error and sent in all applications for teachers who needed their certification, including this Emergency Provisional. Documentation is included showing the declaration date along with the Charter Admin's explanation.

**IMPACT**

If an emergency provisional certificate is not approved, the school district will have no certificated staff to serve in the position as required by Idaho Code §33-1201 and funding could be impacted. In many cases the staff have been serving as long term substitutes or are currently certificated teachers teaching courses in subject areas they do not hold an endorsement to teach in.

**BOARD STAFF COMMENTS AND RECOMMENDATIONS**

Pursuant to Section 33-1201, Idaho Code, "every person who is employed to serve in any public elementary or secondary school in the capacity of teacher, supervisor, administrator, education specialist, school nurse or school librarian shall be required to have and to hold a certificate issued under the authority of the State Board of Education...." Section 33-1203, Idaho Code, prohibits the Board from authorizing standard certificates to individuals who have less than four (4) years accredited college training, except in "the limited fields of trades and industries, and specialists certificates of school librarians and school nurses." In the case of emergencies, which must be declared, "the State Board may authorize the issuance of provisional certificates based on not less than two (2) years of college training."

Section 33-512(15), Idaho Code, defines substitute teachers as "as any individual who temporarily replaces a certificated classroom educator...." Neither Idaho Code, nor administrative rule, limits the amount of time a substitute teacher may

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be employed to cover a classroom. In some cases, school districts use a long-term substitute prior to requesting emergency provisional certification for the individual. The individual that the school district is requesting emergency certification for may have been in the classroom as a long-term substitute for the entire school term. Salary based apportionment is calculated based on school district employee certification. A school district or charter school receives a lesser apportionment for noncertificated/classified staff than it receives for certificated staff. Substitute teachers are calculated at the classified staff rate.

The Department staff have forwarded those applications they recommend for approval for Board consideration. Emergency Provisional Certificates and Endorsements may be issued to an uncertified person with the minimum amount of training or may be issued to individuals with an existing certificate and endorsement outside of the area in which they have been hired. In the case of someone hired outside of the subject area they are endorsed to teach in, the Emergency Provision Certificate/Endorsement is for the endorsement area.

Approval of the requested Emergency Provisional certificates and or endorsements will bring the total approved to date for the 2022-2023 school year to 210. The Board approved 138 certificates and or endorsements in total for the 2021-2022 school year.

The process for approving provisional certificates was approved by the Board at the April 2019 Regular Board meeting to limit the timeline for emergency provisional certificates to come to the Board. The approved provisions required requests, for the current school year, to come to the Board at no later than the April Regular Board meeting. The process was amended at the August 2019 Regular Board meeting to provide an extension of this timeframe “subject to extenuating circumstances” such as when an LEA loses a staff member toward the end of the school year.

**BOARD ACTIONS**

I move to approve the request by State Department of Education, pending a cleared background check, for one-year emergency provisional certificates in the instructional and career technical education and endorsement area(s) at the specified school districts as provided herein for the 2022-2023 school year for the following individuals: Jolynn Haylett, Eric Lopez, Shanna Sorenson, Miranda Boyd, Madison Robinson, Halle Driscoll, Sara Perry, Chandra Day, Carli Ahlers, Caleb Ziegler, Alissa Giannini, Joseph Grant, Kenneth Sutton, Darla Ridenour.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

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**SUBJECT**

Safety Busing - Requests for approval to transport students less than one and one-half miles for the 2022-2023 school year

**REFERENCE**

June 2018	Board approved the request for 99 school districts and 12 charter schools to transport students less than one and one-half miles for the 2017-2018 school year.
June 2019	Board approved the request for 97 school districts and 17 charter schools to transport students less than one and one-half miles for the 2018-2019 school year.
June 2021	Board approved the request for 93 school districts and 21 charter schools to transport students less than one and one-half miles for the 2020-2021 school year.
April 2022	Board approved the request for 97 school districts and 22 charter schools to transport students less than one and one-half miles for the 2021-2022 school year.

**APPLICABLE STATUTE, RULE, OR POLICY**

Sections 33-1006, and 1502, Idaho Code

**BACKGROUND/DISCUSSION**

Pursuant to Section 33-1006, Idaho Code, "The state board of education shall determine what costs of transporting pupils, including maintenance, operation and depreciation of basic vehicles, insurance, payments under contract with other public transportation providers whose vehicles used to transport pupils comply with federal transit administration regulations, "bus testing," 49 CFR part 665, and any revision thereto, as provided in subsection (4)(d) of this section, or other state department of education approved private transportation providers, salaries of drivers, and any other costs, shall be allowable in computing the transportation support program of school districts."

The transportation support program of a school district shall be based upon the allowable costs of transporting pupils less than one and one-half (1½) miles as provided in Section 33-1006(4)(b), Idaho Code, when approved by the State Board of Education.

The *Standards for Idaho School Buses and Operations* states, "All school districts submitting applications for new safety busing reimbursement approval shall establish a board policy for evaluating and rating all safety busing requests. The State Department of Education staff shall develop and maintain a measuring instrument model, which shall include an element for validating contacts with responsible organizations or persons responsible for improving or minimizing hazardous conditions. Each applying district will be required to annually affirm that conditions of all prior approved safety busing requests are unchanged.

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The local board of trustees shall annually, by official action (33-1502, Idaho Code), approve all new safety busing locations. School districts that receive state reimbursement of costs associated with safety busing will re-evaluate all safety busing sites at intervals of at least every three years using the local board adopted measuring or scoring instrument. In order to qualify for reimbursement the local school board will, by official action, approve the initial safety-busing request and allow the students in question to be transported before the application is sent to the state. Consideration for reimbursement is contingent on the application being received by the State Department of Education Transportation Section on or before March 1 of the school year in which the safety busing began.”

All requests are submitted on the Safety Busing form found in the Idaho Bus Utilization System (IBUS) Portal. Reminders are emailed to all districts and charter schools prior to March 1. All requests recommended for approval are compliant with Section 33-1006, Idaho Code.

Ninety-six (96) school districts and twenty-one (21) charter schools affecting 23,383 students applied for safety busing using the correct form and are being recommended for approval.

**IMPACT**

The approval of LEAs with safety-based students listed in Attachment 1 allows LEAs to be reimbursed for routes that meet the safety busing requirements. Board inaction or denial of the safety bus waivers would result in a loss of funding for the LEA's in question.

**ATTACHMENTS**

Attachment 1 – Safety Busing Rider Count Report 2023

**STAFF COMMENTS AND RECOMMENDATIONS**

Section 33-1006, Idaho Code, allows for the reimbursement of cost to transport students 1.5 miles or more from the school and pupils less than 1.5 miles as provided in Section 33-1501, Idaho Code, when approved by the State Board of Education. Section 33-1501, Idaho Code, allows for the reimbursement of transportation cost for pupils less than 1.5 miles from the nearest school when in the judgment of the local board of trustees the age or health or safety of the pupil warrants it.

State Department of Education staff annually review school district requests and forward those meeting the requirements for safety busing to the Board for consideration. Staff recommends approval.

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**BOARD ACTION**

I move to approve the requests by ninety-six (96) school districts and twenty-one (21) charter schools for approval to transport students less than one and one-half miles as submitted in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_



<b>Safety Busing Rider Count Report 2022-2023</b>		
<b>Districts</b>	<b>2022-2023</b>	
Aberdeen District	89	
American Falls Joint District	197	
Basin School District	0	
Bear Lake County District	238	
Blackfoot District	597	
Blaine County District	516	
Bliss Joint District	44	
Boise Independent District	688	
Bonneville Joint District	2896	
Boundary County District	74	
Butte County Joint District	47	
Camas County District	0	
Cambridge Joint District	7	
Cascade District	0	
Cassia County Joint District	486	
Castleford District	6	
Challis Joint District	18	
Clark County District	25	
Coeur D'alene District	0	
Cottonwood Joint District	42	
Council District	0	
Culdesac Joint District	6	
Dietrich District	0	
Emmett Independent District	142	
Firth District	0	
Fremont County Joint District	0	
Fruitland District	80	
Future Public School, Inc.	10	
Garden Valley District	0	
Genesee Joint District	51	
Glenns Ferry Joint District	142	
Gooding Joint District	472	
Hagerman Joint District	60	
Hansen District	26	
Homedale Joint District	366	
Horseshoe Bend School District	109	
Idaho Arts Charter School, Inc.	43	
Idaho Falls District	1188	
Jefferson County Joint District	1214	
Jerome Joint District	500	
Joint School District No. 2	575	
Kamahia Joint District	24	
Kellogg Joint District	38	
Kimberly District	147	

<b>Kootenai District</b>	12	
<b>Kuna Joint District</b>	228	
<b>Lake Pend Oreille School District</b>	233	
<b>Lakeland District</b>	0	
<b>Lapwai District</b>	46	
<b>Madison District</b>	388	
<b>Marsh Valley Joint District</b>	65	
<b>Marsing Joint District</b>	61	
<b>Melba Joint District</b>	15	
<b>Midvale District</b>	0	
<b>Minidoka County Joint District</b>	1224	
<b>Moscow District</b>	95	
<b>Mountain Home District</b>	282	
<b>Mountain View School District</b>	156	
<b>Murtaugh Joint District</b>	0	
<b>Nampa School District</b>	1637	
<b>New Plymouth District</b>	58	
<b>North Gem District</b>	19	
<b>Notus District</b>	122	
<b>Oneida County District</b>	88	
<b>Orofino Joint District</b>	42	
<b>Parma District</b>	109	
<b>Payette Joint District</b>	485	
<b>Plummer-Worley Joint District</b>	76	
<b>Pocatello District</b>	1761	
<b>Post Falls District</b>	116	
<b>Potlatch District</b>	29	
<b>Preston Joint District</b>	376	
<b>Richfield District</b>	0	
<b>Ririe Joint District</b>	110	
<b>Rockland District</b>	41	
<b>Salmon District</b>	81	
<b>Salmon River Joint School District</b>	0	
<b>Shelley Joint District</b>	0	
<b>Shoshone Joint District</b>	148	
<b>Snake River District</b>	47	
<b>Soda Springs Joint District</b>	0	
<b>South Lemhi District</b>	20	
<b>St Maries Joint District</b>	30	
<b>Sugar-Salem Joint District</b>	0	
<b>Swan Valley Elementary District</b>	19	
<b>Teton County District</b>	21	
<b>Troy School District</b>	50	
<b>Twin Falls District</b>	679	
<b>Vallivue School District</b>	1145	
<b>Wallace District</b>	108	
<b>Weiser District</b>	370	
<b>Wendell District</b>	87	

<b>West Bonner County District</b>	43	
<b>West Jefferson District</b>	30	
<b>West Side Joint District</b>	802	
<b>Wilder District</b>	120	
	<b>22837</b>	<b>96</b>
<b>Charters</b>		
<b>Blackfoot Charter Community Learning Center, Inc.</b>	35	
<b>Cardinal Academy Incorporated</b>	1	
<b>Compass Public Charter School, Inc.</b>	14	
<b>Elevate Academy Inc.</b>	0	
<b>Falcon Ridge Public Charter School, Inc.</b>	15	
<b>Gem Prep: Meridian, Llc</b>	0	
<b>Gem Prep: Nampa, Llc</b>	0	
<b>Heritage Academy, Inc.</b>	50	
<b>Heritage Community Charter School, Inc.</b>	132	
<b>Idaho Science And Technology Charter School, Inc.</b>	34	
<b>Idaho Stem Academy, Inc.</b>	18	
<b>Legacy Public Charter School, Inc.</b>	4	
<b>Liberty Charter School, Inc.</b>	5	
<b>North Star Charter School, Inc.</b>	0	
<b>Project Impact Stem Academy, Inc.</b>	0	
<b>Rolling Hills Public Charter School, Inc.</b>	30	
<b>Thomas Jefferson Charter School, Inc.</b>	56	
<b>Treasure Valley Classical Academy, Inc.</b>	86	
<b>Victory Charter School, Inc.</b>	3	
<b>Vision Charter School, Inc.</b>	63	
<b>Xavier Charter School, Inc.</b>	0	
	<b>546</b>	<b>21</b>
<b>Districts</b>	<b>22837</b>	<b>96</b>
<b>Charters</b>	<b>546</b>	<b>21</b>
	<b>23383</b>	

**CONSENT**  
**APRIL 25, 2023**

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**SUBJECT**

Transportation Funding – 103% Cap Waiver

**REFERENCE**

June 2020	Board approved the request for six (6) districts to receive a funding cap waiver
June 2021	Board approved the request for eight (8) school districts to receive a funding cap waiver
June 2022	Board approved the request for six (6) school districts to receive a funding cap waiver

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-1006, Idaho Code

**BACKGROUND/DISCUSSION**

Section 33-1006, Idaho Code designates certain bus runs as “hardship” runs, and allow the district to receive a higher cap based on the percentage of the district’s bus runs that exceed by 103% the statewide average cost per mile and cost per rider.

As of March 8, 2023, 30 school districts and/or charter schools were negatively affected by the pupil transportation funding cap.

The State Department of Education received requests from various school districts and charter schools for a waiver of the 103% funding cap as provided in Section 33-1006, Idaho Code. Student Transportation staff reviewed these requests to ensure they meet the eligibility criteria. Of the 30 districts and charter schools negatively affected by the pupil transportation funding cap, only four districts have routes meeting the statutory requirements of a hardship bus run, which would allow the Board to grant a waiver. All four of these districts have applied for a waiver from the student transportation funding cap.

**#341 Lapwai District** submitted school bus routes that met the required criteria. This represents 44.44% of the bus runs operated by the district. When added to the 103% funding cap, as provided by law, this would allow the Board to increase their funding cap to a maximum of 147.44%.

**#244 Mountain View School District** submitted school bus routes that met the required criteria. This represents 65% of the bus runs operated by the district. When added to the 103% funding cap, as provided by law, this would allow the Board to increase their funding cap to a maximum of 168%.

**#171 Orofino School District** submitted school bus routes that met the required criteria. This represents 25% of the bus runs operated by the district. When added to the 103% funding cap, as provided by law, this would allow the Board to increase their funding cap to a maximum of 128%.

**CONSENT**  
**APRIL 25, 2023**

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**#305 Highland School District** submitted school bus routes that met the required criteria. This represents 80% of the bus runs operated by the district. When added to the 103% funding cap, as provided by law, this would allow the Board to increase their funding cap to a maximum of 183%.

**IMPACT**

Approval of the cap waivers allows districts to be reimbursed for routes that meet the hardship criteria. Board inaction or denial of the funding cap waivers would result in a loss of funding for the school districts in question.

**ATTACHMENTS**

Attachment 1 – Negatively Affected Schools / Charters  
Attachment 2 – Funding Cap Waiver Spreadsheet

**STAFF COMMENTS AND RECOMMENDATIONS**

At the June 2022 Regular Board meeting the Board approved waivers for 6 school districts: Orofino County, Mountain View, Moscow, Highland Joint, Lapwai, and Kimberly School Districts. All four of the school districts the Board is considering had waivers of the funding cap approved in 2022.

Pursuant to Section 33-1006, Idaho Code:

“A school district may appeal the application of the one hundred three percent (103%) limit on reimbursable costs to the state board of education, which may establish for that district a new percentile limit for reimbursable costs compared to the statewide average, which is higher than one hundred three percent (103%). In doing so, the state board of education may set a new limit that is greater than one hundred three percent (103%), but is less than the percentile limit requested by the school district. However, the percentage increase in the one hundred three percent (103%) cap shall not exceed the percentage of the district’s bus runs that qualify as a hardship bus run, pursuant to this subsection. Any costs above the new level established by the state board of education shall not be reimbursed. Such a change shall only be granted by the state board of education for hardship bus runs. To qualify as a hardship bus run, such bus run shall meet at least two (2) of the following criteria:

- (a) The number of student riders per mile is less than fifty percent (50%) of the statewide average number of student riders per mile;
- (b) Less than a majority of the miles on the bus run are by paved surface, concrete or asphalt road;
- (c) Over ten percent (10%) of the miles driven on the bus run are a five percent (5%) slope or greater.

The Department of Education transportation staff review each of the applications prior to submittal for Board consideration. Only those school districts that have met the statutory requirements may be considered for approval.

**CONSENT**  
**APRIL 25, 2023**

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**BOARD ACTION**

I move to approve the request by #341 Lapwai School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2023 of 147.44%, for a total of \$27,202 in additional funds from the public-school appropriation.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

AND

I move to approve the request by #244 Mountain View School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2023 of 168%, for a total of \$48,505 in additional funds from the public-school appropriation.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

AND

I move to approve the request by #171 Orofino School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2023 of 128%, for a total of \$39,207 in additional funds from the public-school appropriation.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

AND

I move to approve the request by #305 Highland Joint District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2023 of 183%, for a total of \$44,476 in additional funds from the public-school appropriation.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

<b>District #</b>	<b>District Name</b>	<b>Reduction in Funding</b>
002	JOINT SCHOOL DISTRICT NO. 2	\$914,821
011	MEADOWS VALLEY DISTRICT	\$41,127
061	BLAINE COUNTY DISTRICT	\$39,271
071	GARDEN VALLEY DISTRICT	\$74,010
072	BASIN SCHOOL DISTRICT	\$52,231
131	NAMPA SCHOOL DISTRICT	\$317,124
134	MIDDLETON DISTRICT	\$47,895
137	PARMA DISTRICT	\$6,738
171	OROFINO JOINT DISTRICT	\$39,207
244	MOUNTAIN VIEW SCHOOL DISTRICT	\$48,505
271	COEUR D'ALENE DISTRICT	\$272,394
285	POTLATCH DISTRICT	\$4,200
305	HIGHLAND JOINT DISTRICT	\$44,476
314	DIETRICH DISTRICT	\$5,891
341	LAPWAI DISTRICT	\$27,202
381	AMERICAN FALLS JOINT DISTRICT	\$46,479
391	KELLOGG JOINT DISTRICT	\$5,007
393	WALLACE DISTRICT	\$11,494
411	TWIN FALLS DISTRICT	\$76,994
412	BUHL JOINT DISTRICT	\$5,594
421	MCCALL-DONNELLY JOINT SCHOOL DISTRICT	\$63,069
456	FALCON RIDGE PUBLIC CHARTER SCHOOL, INC.	\$6,140
461	TAYLOR'S CROSSING PUBLIC CHARTER SCHOOL, INC.	\$23,449
475	THE SAGE INTERNATIONAL SCHOOL OF BOISE, A PUBLIC CHARTER SCHOOL, INC.	\$3,586
478	LEGACY PUBLIC CHARTER SCHOOL, INC.	\$9,759
499	FUTURE PUBLIC SCHOOL, INC.	\$20,081
511	PEACE VALLEY CHARTER SCHOOL, INC.	\$10,405
513	PROJECT IMPACT STEM ACADEMY, INC.	\$9,873
544	MOSAICS PUBLIC SCHOOL, INC.	\$8,868
508	HAYDEN CANYON CHARTER SCHOOL, INC.	\$19,993

**Pupil Transportation Funding Formula Capped at Legislatively Mandated Percent of State Average  
Cost Per Mile and Cost Per Rider**

**Fiscal Year 2020-2021 Data - Approved Costs Reimbursed in Fiscal Year 2022-2022 (Eighteenth Capped Year)**

Set percentage cap to apply to statewide average **103%** Riders per Mile **1.5**

Revised: **1/15/2023 Second Draft**

	Cost Per Mile	Cost Per Rider
Statewide Averages before cap	\$5.22	\$1,315
Statewide Averages after cap	\$5.38	\$1,354

Dist #	District Name	District Funding Capped - Reimbursement Reduced By:	Percent of Reimbursement Loss Subsequent to Cap Impact (See Columns X & Y)	Total 100% Reimbursable Costs Eligible at 50%	Funding Cap Penalty Waived	% Hardship Bus Run Waived	Final Payment Amount
171	OROFINO JOINT DISTRICT	\$39,207	9.5%	\$435,975	TRUE	0.0625	\$580,262
244	MOUNTAIN VIEW SCHOOL DISTRICT	\$48,505	7.9%	\$546,443			\$785,510
305	HIGHLAND JOINT DISTRICT	\$44,476	24.2%	\$0			\$208,731
341	LAPWAI DISTRICT	\$27,202	19.3%	\$149,510			\$160,570



**CONSENT**  
**APRIL 25, 2023**

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**STATE DEPARTMENT OF EDUCATION**

**SUBJECT**

Adoption of Praxis II Tests and Idaho Cut Scores

**REFERENCE**

February 2020	Board approved Praxis II assessments and Idaho cut scores and amended the Content, Pedagogy and Performance Assessments rubric
February 2021	Board accepted the Professional Standards Commission recommendation to approve Praxis II assessments and Idaho cut scores
April 2022	Board accepted the Professional Standards Commission recommendation to approve proposed Praxis II assessments and Idaho cut scores
December 2022	Board accepted the Professional Standards Commission recommendation to approve proposed Praxis II assessments and Idaho cut scores

**APPLICABLE STATUTE, RULE, OR POLICY**

IDAPA 08.02.02.015.01.d - Standard Instructional Certificate  
IDAPA 08.02.02.017.01 - Content, Pedagogy and Performance Assessment for Certification

**BACKGROUND/DISCUSSION**

One of the requirements for obtaining a Standard Instructional Certificate is that proficiency be shown in the area of endorsement being sought (IDAPA 08.02.02.015.01.d). Each candidate must meet or exceed the state qualifying score on the State Board of Education (Board)-approved content area assessment. Praxis II – Subject Assessments are one of the Board-approved content area assessments. The Professional Standards Commission is charged with recommending assessments and qualifying scores to the Board for approval (IDAPA 08.02.02.017.01). On February, 2, 2023, the Professional Standards Commission voted to recommend the following amendments to assessments and qualifying scores to the Board for approval:

- Adoption of Praxis II assessment 5355 Special Education: Foundational Knowledge, with a multi-state qualifying score of 145, to replace expiring assessments 5354 Special Education: Core Knowledge and Applications, and 5543: Special Education: Core Knowledge and Mild to Moderate Applications
- Adoption of Praxis II assessment 5205 Teaching Reading: Elementary, with a multi-state qualifying score of 159, to support the newly adopted Early Literacy K-3 endorsement.

**CONSENT**  
**APRIL 25, 2023**

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**IMPACT**

Approval of assessments and cut scores ensures compliance with Idaho Administrative Code.

**ATTACHMENTS**

Attachment 1 – ETS Praxis II Assessments and Qualifying Scores

**STAFF COMMENTS AND RECOMMENDATIONS**

Pursuant to IDAPA 08.02.02.017, the Professional Standards Commission (Commission) recommends assessments and qualifying scores to the State Board of Education for approval. While the Commission is required to make recommendations to the Board in this area, the Board may also approve assessments and qualifying scores that have recommended by Board staff or other groups. IDAPA 08.02.02. includes multiple references to requirements for instructional staff candidates to receive a qualifying score on a Board approved content area, pedagogy, or performance assessment as applicable to the route or type of certification.

The Praxis II is one of the Board approved content area assessments. Receiving a qualifying score on a content area assessment is required for earning a standard instructional certificate, career technical degree-based certification, alternate routes for content area endorsements, and interim certification through an alternative authorization for content specialist. The PRAXIS II was approved by the Board in early 2000.

Qualifying scores were set by the Board based on recommendations from the Commission at the December 2003 Board meeting, effective September 1, 2004. A few updates to the qualifying scores in individual subject areas were made at the June 2005, April 2006, June 2006, October 2006 and February 2018 Board meetings. Starting in 2019, updates have come to the Board more regularly. Consideration of the attached qualifying scores is part of the ongoing process to maintain updated qualifying scores on Board-approved content, pedagogy or performance assessments.

In February 2020, the Board requested the Commission to include in their consideration and make recommendations on additional types of assessments that could serve as content, pedagogy, or performance assessment for certification purposes. The PRAXIS is the only assessment that the Commission has recommended at this time. The Board approved a mastery-based assessment and scoring rubric for determining the qualifying score in 2018 based on Board staff work and stakeholder input.

**CONSENT**  
**APRIL 25, 2023**

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**BOARD ACTION**

I move to accept the recommendation of the Professional Standards Commission to approve the proposed Praxis II assessments and qualifying scores as provided in Attachment 1.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

Standard Instructional Certificate						NOTE: Passing scores on discontinued/expired tests will be accept for 5 years after the expiration date.
Endorsement Code	Endorsement	Content/ Grade Level	ETS Praxis II Subject Assessment	Idaho Cut Score	Multi State Cut Score	Comments:
7010	All Subjects (Candidates can take 5001 OR 7811)	(K-8)	Elementary Education: 5002 Reading and Language Arts Subtest AND	157	157	
			Elementary Education: 5003 Mathematics Subtest AND	157	157	
			Elementary Education: 5004 Social Studies Subtest AND	155	155	
			Elementary Education: 5005 Science Subtest	159	159	
7010	All Subjects (Candidates can take 5001 OR 7811)	(K-8)	CKT Elementary Education: 7812 Reading and Language Arts Subtest AND	161	161	
			CKT Elementary Education: 7813 Mathematics Subtest AND	150	150	
			CKT Elementary Education: 7814 Science Subtest AND	154	154	
			CKT Elementary Education: 7815 Social Studies Subtest	161	161	
8222	American Government/Political Science	(5-9)	5089 Middle School Social Studies	149	-	
7222		(6-12)	5931 Government/Political Science	149	149	
7770	American Indian Language	(K-12)	-	-	-	
7038	Bilingual Education	(K-12)	5362 English to Speakers of Other Languages	155	155	
8421		(5-9)	5442 Middle School Science	152	152	
7421	Biological Science	(6-12)	5236 Biology	154	154	5235 test to be discontinued with Aug. 2023 as the last day of administration. 5236 regenerated test available Sept. 2022
7083	Blended Early Childhood Education/Early Childhood Special Education	(Birth-Grade 3)	5025 Early Childhood Education OR Elementary Subtests (See All Subjects 5001 or 7811) AND	156	156	
			5692 Special Education: Early Childhood/Early Intervention	159	159	
7014	Blended Elementary Education/Elementary Special Education	(Grade 4-6)	Elementary Subtests (See All Subjects 5001 or 7811)	See All Subjects	See All Subjects	Must also hold the endorsement and successfully pass the requisite Praxis exams for Blended Early Childhood Education/Early Childhood Special Education endorsement
8440	Chemistry	(5-9)	5442 Middle School Science	152	152	
7440		(6-12)	5246 Chemistry	146	146	5245 test to be discontinued with Aug. 2023 as the last day of administration. 5246 regenerated test available Sept. 2022
8144	Communication	(5-9)	5221 Speech Communication: Content Knowledge	143	-	
7144		(6-12)				
8400	Computer Science	(5-9)	5652 Computer Science	149	149	
7400		(6-12)				
9921	CTE - Agriculture Science & Technology	(6-12)	5701 Agriculture	147	147	
9093	CTE - Business Technology Education	(6-12)	5101 Business Education: Content Knowledge	148	154	
9400	CTE - Computer Science	(6-12)	5652 Computer Science	149	149	
9401	CTE - Engineering	(6-12)	5051 Technology Education	154	159	
9970	CTE - Family and Consumer Sciences	(6-12)	5122 Family and Consumer Sciences	153	153	
9092	CTE - Marketing Technology Education	(6-12)	5561 Marketing Education	158	-	
9981	CTE - Technology Education	(6-12)	5051 Technology Education	154	159	
7030	Deaf/Hard of Hearing	(Pre-K-12)	<del>5354 Special Education: Core Knowledge and Applications</del> <del>5355 Special Education: Foundational Knowledge</del> AND	145	145	5354 test to be discontinued with the last administration date of Aug. 2024. Test replaced with new test 5355, available Sept. 2023
			5272 Special Education: Education of Deaf and Hard of Hearing Students	160	160	
7019	Early Childhood Special Education	(Pre-K-3)	5025 Early Childhood Education OR Elementary Multiple Subtests (See All Subjects 5001 or 7811) AND	156	156	
			5692 Special Education: Early Childhood/Early Intervention	159	159	
7140	Early Literacy	(K-3)	5205 Teaching Reading: Elementary	159	159	
8451		(5-9)	5442 Middle School Science	152	152	
7451	Earth and Space Science	(6-12)	5572 Earth and Space Sciences	154	154	5571 test to be discontinued Aug. 2023 as the last day of administration. 5572 regenerated test available Sept. 2022

Standard Instructional Certificate						NOTE: Passing scores on discontinued/expired tests will be accept for 5 years after the expiration date.
Endorsement Code	Endorsement	Content/ Grade Level	ETS Praxis II Subject Assessment	Idaho Cut Score	Multi State Cut Score	Comments:
8228	Economics	(5-9)	5089 Middle School Social Studies	149	-	
7228		(6-12)	5911 Economics	150	150	
8990	Engineering	(5-9)	5051 Technology Education	154	159	
7990		(6-12)				
8120	English	(5-9)	5047 Middle School English Language Arts	164	164	
7120		(6-12)	5038 English Language Arts: Content Knowledge	167	167	
7126	English as a Second Language (ESL)	(K-12)	5362 English to Speakers of Other Languages	155	155	
7036	Exceptional Child Generalist	(K-8)	5543 Special Education: Core Knowledge and Mild to Moderate Applications 5355 Special Education: Foundational Knowledge AND Elementary Subtests (See All Subjects 5001 or 7811)	453 145	458 145	5543 test to be discontinued, with the last administration date of Aug. 2024. Test replaced with new test 5355, available Sept. 2023
7037		(6-12)		See All Subjects	See All Subjects	
7029		(K-12)				
8226	Geography	(5-9)	5089 Middle School Social Studies	149	-	
7226		(6-12)	5921 Geography	153	-	
8452	Geology	(5-9)	5442 Middle School Science	152	152	
7452		(6-12)	5572 Earth and Space Sciences	154	154	5571 test to be discontinued with Aug. 2023 as the last day of administration. 5572 regenerated test available Sept. 2022
7028	Gifted and Talented	(K-12)	5358 Gifted Education	157	157	
8520	Health	(5-9)	5551 Health Education	155	-	
7520		(6-12)				
7521		(K-12)				
8221	History	(5-9)	5089 Middle School Social Studies	149	-	
7221		(6-12)	5941 World and U.S. History: Content Knowledge	141	-	
8133	Humanities	(5-9)	-	-	-	
7133		(6-12)	-	-	-	
8134	Journalism	(5-9)	5224 Journalism	153	153	
7134		(6-12)				
7080	Junior ROTC	(6-12)	-	-	-	
7139	Literacy	(K-12)	5206 Teaching Reading	156	156	
8320	Mathematics - Middle Level	(5-9)	5164 Middle School Mathematics	157	157	
7300	Mathematics	(6-12)	5165 Mathematics	159	159	
8820	Music	(5-9)	5113 Music: Content Knowledge	148	161	
7820		(6-12)				
7810		(K-12)				
7420	Natural Science	(6-12)	5436 General Science	141	141	Must also hold an endorsement and successfully pass the requisite Praxis exam in one of the following areas: Agriculture Science Technology (6-12), Biological Science (6-12), Chemistry (6-12), Earth and Space Science (6-12), Geology (6-12) or Physics (6-12)
7989	Online-Teacher	(Pre-K-12)	-	-	-	
8510	Physical Education (PE)	(5-9)	5091 Physical Education: Content Knowledge	143	-	
7512		(6-12)				
7511		(K-12)				
8430	Physical Science	(5-9)	5442 Middle School Science	152	152	
7430		(6-12)	5485 Physical Science	157	157	

Standard Instructional Certificate						NOTE: Passing scores on discontinued/expired tests will be accept for 5 years after the expiration date.
Endorsement Code	Endorsement	Content/ Grade Level	ETS Praxis II Subject Assessment	Idaho Cut Score	Multi State Cut Score	Comments:
8450	Physics	(5-9)	5442 Middle School Science	152	152	
7450		(6-12)	5266 Physics	145	145	
8231	Psychology	(5-9)	5391 Psychology	154	154	
7231		(6-12)				
8453	Science - Middle Level	(5-9)	5442 Middle School Science	152	152	
7200	Social Studies	(6-12)	5081 Social Studies: Content Knowledge	150	-	Must also hold an endorsement and successfully pass the requisite Praxis exam in one of the following areas: History, American Government/Political Science, Economics or Geography.
8220	Social Studies - Middle Level	(5-9)	5089 Middle School Social Studies	149	-	
8229	Sociology	(5-9)	5952 Sociology	154	154	
7229		(6-12)				
8236	Sociology/Anthropology	(5-9)	5952 Sociology	154	154	
7236		(6-12)				
7297	Teacher Leader - Instructional Specialist	-		-	-	
7296	Teacher Leader - Instructional Technology	-		-	-	
7298	Teacher Leader - Literacy	-	5206 Teaching Reading (OR)	156	156	This test is currently used for the Literacy K-12 endorsement
			5205 Teaching Reading: Elementary (OR)	159	159	<a href="#">This test is being recommended for the Early Literacy K-3 endorsement</a>
			5302 Reading Specialist	165	165	This test was previously used in Idaho for the Literacy K-12 endorsement and was re-adopted for use aligning to this endorsement
7299	Teacher Leader - Mathematics	-	5164 Middle School Mathematics (OR)	157	157	This test is currently used for the Mathematics - Middle Level (5-9) endorsement
			5165 Mathematics (OR)	159	159	This test is currently used for the Mathematics (6-12) endorsement
			5037 Elementary Education: Math Specialist	153	153	
7045	Teacher Leader - Special Education	-		-	-	Individuals seeking the Teacher Leader - Special Education Endorsement are required to additionally hold a Standard Instructional Certificate endorsement Generalist K-12, K-8 or 5-9 endorsement
7020	Teacher Librarian	(K-12)	5312 School Librarian	154	154	5311 test to be discontinued with Aug. 2023 as the last day of administration. 5312 regenerated test available Sept. 2022
8137	Theater Arts	(5-9)	5641 Theatre	148	-	
7137		(6-12)				
8852	Visual Arts	(5-9)	5134 Art: Content Knowledge	151	158	
7852		(6-12)				
7851		(K-12)				

Standard Instructional Certificate						NOTE: Passing scores on discontinued/expired tests will be accept for 5 years after the expiration date.
Endorsement Code	Endorsement	Content/ Grade Level	ETS Praxis II Subject Assessment	Idaho Cut Score	Multi State Cut Score	Comments:
7035	Visual Impairment	(Pre-K-12)	<del>5354 Special Education: Core Knowledge and Applications</del> -5355 Special Education: Foundational Knowledge AND	145 <del>145</del>	<del>151</del> 145	5354 test to be discontinued with the last administration date of Aug. 2024. Test replaced with new test 5355, available Sept. 2023
			5282 Special Education: Teaching Students with Visual Impairments	163	163	
8700	World Language (All other languages not listed below)	(5-9)	5841 World Language Pedagogy	151	158	
7700		(6-12)				
7710		(K-12)				
8702	World Language - American Sign Language	(5-9)	0634 American Sign Language Proficiency Interview (ASLPI) by Gallaudet	3 (score is equivalent to a 160 scale score)	160	
7702		(6-12)				
7701		(K-12)				
8796	World Language - Chinese	(5-9)	5665 Chinese (Mandarin): World Language	164	164	
7796		(6-12)				
7715		(K-12)				
8830	World Language - French	(5-9)	5174 French: World Language	156	162	
7730		(6-12)				
7712		(K-12)				
8740	World Language - German	(5-9)	5183 German: World Language	157	163	
7740		(6-12)				
7713		(K-12)				
7792	World Language - Japanese	(K-12)	5661 Japanese	156	156	
7750	World Language - Latin	(K-12)	5601 Latin	152	-	
7714	World Language - Russian	(K-12)	5671 Russian: World Language	130	130	New test - adopted by SBOE at their December 2022 meeting.
8720	World Language - Spanish	(5-9)	5195 Spanish: World Language	163	168	
7720		(6-12)				
7711		(K-12)				

**CONSENT**  
**APRIL 25, 2023**

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**STATE DEPARTMENT OF EDUCATION**

**SUBJECT**

Appointments to the Professional Standards Commission

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-1252, Idaho Code

**BACKGROUND/DISCUSSION**

Section 33-1252, Idaho Code, sets forth criteria for membership on the Professional Standards Commission (Commission). The Commission consists of eighteen (18) members including one (1) from the State Department of Education and one (1) from the Division of Career Technical Education. The remaining members shall be representative of the teaching profession of the State of Idaho, and not less than seven (7) members shall be certificated classroom teachers in the public school system and shall include at least one (1) teacher of exceptional children and at least one (1) in pupil personnel services.

The Idaho School Superintendents' Association, the Idaho Association of Secondary School Principals, the Idaho Association of Special Education Administrators, the education departments of private colleges, and the colleges of letters and sciences of the institutions of higher education may submit nominees for (1) position each. The community colleges and the education departments of the public institutions of higher education may submit nominees for two (2) positions.

Four (4) positions on the Commission are open for three (3)-year appointments, effective July 1, 2023: one (1) position representing certificated classroom teachers, one (1) position representing public higher education/teacher education, one (1) position representing school superintendents, and one (1) position representing directors of special education.

Nominations were sought from the Idaho Association of Colleges for Teacher Education (IACTE), Idaho Education Association (IEA), Northwest Professional Educators (NWPE), Idaho Indian Education Committee (IIEC), Idaho School Superintendents' Association (ISSA), and Idaho Association of Special Education Administrators (IASEA). Nominations for appointment or reappointment were received from IEA, IACTE, ISSA, and IASEA. Positions appointed to the Commission sit as representatives to the respective seats they are appointed to, not the association or group that nominated them for Board for consideration.

In compliance with Section 33-1252(2), Idaho Code, three (3) nominations are required to be put forward for each open position. Both the Idaho School Superintendents' Association and the Idaho Association of Special Education Administrators nominated their current Commission appointee for reappointment



**CONSENT**  
**APRIL 25, 2023**

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and did not seek additional nominations from their membership. Jonelle Warnock of Boise School District and Katie Mathias of Boise State University are recommended for appointment to the Commission, and Lance Harrison of Preston School District and Ramona Lee of West Ada School District are recommended for reappointment to the Commission.

**IMPACT**

Board action allows for appointment or reappointment of members to the Professional Standards Commission, ensuring all seats on the Commission are filled.

**ATTACHMENTS**

- Attachment 1 – Current Professional Standards Commission Members
- Attachment 2 – Jonelle Warnock, nominated by IEA
- Attachment 3 – Lindsey McKinney, nominated by IEA
- Attachment 4 – Eric McDowell, nominated by IEA
- Attachment 5 – Katie Mathias, nominated by IACTE
- Attachment 6 - Jennifer Snow, nominated by IACTE
- Attachment 7 – Taylor Raney, nominated by IACTE
- Attachment 8 – Lance Harrison, nominated by ISSA
- Attachment 9 – Ramona Lee, nominated by IASEA

**STAFF COMMENTS AND RECOMMENDATIONS**

Pursuant to Section 33-1252(2), Idaho Code, “Except for the member from the staff of the State Department of Education, and the member from the staff of the Division of Career Technical Education, three (3) nominees for each position on the Commission shall be submitted to the State Superintendent of Public Instruction, for the consideration of the State Board of Education. Any state organization of teachers whose membership is open to all certificated teachers in the state may submit nominees for positions to be held by classroom teachers; the Idaho Association of School Superintendents may submit nominees for one (1) position, the Idaho Association of Secondary School Principals may submit nominees for one (1) position; the Idaho association of elementary school principals may submit nominees for one (1) position; the Idaho School Boards Association may submit nominees for one (1) position; the Idaho Association of Special Education Administrators may submit nominees for one (1) position; the education departments of the private colleges of the state may submit nominees for one (1) position, the community colleges and the education departments of the public institutions of higher education may submit nominees for two (2) positions, and the colleges of letters and sciences of the institutions of higher education may submit nominees for one (1) position.” Additionally, Section 33-1252, Idaho Code, requires not less than seven (7) members be certificated classroom teachers in the public school system and shall include at least one (1) teacher of exceptional children and at least one (1) teacher in pupil personnel services. While not required, historical practice has been to identify whether a teacher serving on the

**CONSENT**  
**APRIL 25, 2023**

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Commission is an elementary or secondary school teacher to assure a balance in the representation on the Commission.

Original appointments are made for a term of three years. Appointments to fill vacant positions are made for the remainder of the term they are filling. This process helps to limit the number of new appointments that have to be made in a single year and helps to assure some continuity of membership on the Commission.

**BOARD ACTION**

I move to appoint Jonelle Warnock of Boise School District to the Professional Standards Commission, replacing Chanel Harming of Lapwai School District, for a three-year term beginning July 1, 2023, and ending June 30, 2026, replacing Chanel Harming, representing certificated classroom teachers.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

AND

I move to appoint Katie Mathias of Boise State University to the Professional Standards Commission, replacing Emma Wood of Idaho State University, for a three-year term beginning July 1, 2023, and ending June 30, 2026, representing public higher education/teacher education.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

AND

I move to reappoint Lance Harrison of Preston School District to the Professional Standards Commission for a three-year term beginning July 1, 2023, and ending June 30, 2026, representing school superintendents.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

AND

I move to reappoint Ramona Lee of West Ada School District to the Professional Standards Commission for a three-year term beginning July 1, 2023, and ending June 30, 2026, representing special education administrators.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

## 2022-2023 Member Roster

**Marianne Sletteland, Chair**

Exceptional Child Teacher  
Moscow School District #281  
Term 7/1/22 – 6/30/25

Vanessa Anthony-Stevens, Public Teacher Education  
University of Idaho  
Term 7/1/22 – 6/30/25

Stephanie Brodwater, Classroom Teacher  
Post Falls School District #273  
Term (Partial) 10/19/22 – 6/30/25

Tate Castleton, Elementary Principal  
Homedale Joint School District #370  
Term 7/1/21 – 6/30/24

Kristi Enger, Educator Certification Director  
Idaho Career Technical Education  
Term 7/1/21 – 6/30/24

Angela Gillman, Classroom Teacher  
Idaho Falls School District #091  
Term 7/1/21 – 6/30/24

Katie Horner, Classroom Teacher  
Murtaugh School District #418  
Term 7/1/21 – 6/30/24

Lance Harrison, School Superintendent  
Preston Joint District #201  
Term (Partial) 4/21/22 – 6/30/23

Stacey Jensen, Classroom Teacher  
Pocatello School District #025  
Term 7/1/22 – 6/30/25

**Chanel Harming, Vice Chair**

Classroom Teacher  
Lapwai School District #341  
Term (Partial) 10/20/21-6/30/23

Ramona Lee, Special Education Administrator  
West Ada School District #002  
Term 7/1/20 – 6/30/23

Amy McBride, Secondary Principal  
Twin Falls School District #411  
Term 7/1/22 – 6/30/25

Jamee Nixon, College of Letters and Sciences  
Northwest Nazarene University  
Term 7/1/22 – 6/30/25

Karen Pyron, School Board Member  
Butte County School District #111  
Term 7/1/21 – 6/30/24

MeLissa Rose, Pupil Service Staff  
Lakeland School District #272  
Term 7/1/22 – 6/30/25

Lori Sanchez, Private Teacher Education  
Northwest Nazarene University  
Term 7/1/21 – 6/30/24

Emma Wood, Public Teacher Education  
Idaho State University  
Term 7/1/20 – 6/30/23

Ryan Cantrell, Chief Deputy Superintendent  
State Department of Education  
February 2, 2023 – June 30, 2026

**Jonelle R. Warnock**

Home:



School:

Boise High School  
1010 W. Washington St.  
Boise, Idaho 83702

Phone: 208-371-6511

E-mail: jonelle.warnock@boiseschools.org

**Education**

Summer 2017, Driver's Education endorsement  
Summer 2010, Boise State Writing Project Fellow  
May 2003, Library science endorsement, University of Idaho, Moscow, ID  
May 1999, Masters of English, Boise State University, Boise, ID  
May 1992, Bachelor of Arts, Whittier College, Whittier, CA  
May 1988, High School Diploma, Borah High School, Boise, ID

**Teaching Certificates/Endorsements**

Idaho English 6-12, Library Media Specialist 6-12  
Idaho Technology Certification  
HOUSSE Highly Qualified in Language Arts

**Education Experience**

**Boise High School** Boise, Idaho  
Learning Coach for all teachers and grade levels (2022-present)

**West Jr. High School** Boise, Idaho  
AVID 9 (2012-2022)  
English 9, Accelerated English 9 (2007-2022)  
Library Media Specialist (2004-2007)  
English 7, 8, 9, Yearbook (1993-1999)

**Idaho Digital Learning Alliance** Boise, Idaho  
**(adjunct with College of Eastern Idaho)**  
Dual Credit English 101/102 (2020-present)  
English 10b (2022)

**Boise State University** Boise, Idaho  
ENGL 481 Teaching Literature to Jr. and Sr. High Students (Spring 2015, Fall 2017)

**Timberline High School** Boise, Idaho  
English 10, English 11, Student Leadership (1999-2004)

**Professional Responsibilities/Committees**

BSD ELA screener (2015-present)  
BEA/BSD Joint Negotiations Team (2004-present)  
West JHS Literacy Coach (2021-2022)  
West JHS leadership team (2009-2022)  
West JHS AVID site team (2012-2022)  
West JHS Student Council Advisor (2010-2022)  
Boise School District Pre-AP committee (2018-2022)  
Idaho Coaching Network (2014-2019)  
Wassmuth Center Human Rights Curriculum Committee (2021-2022)  
Idaho Council of Teachers of English Board member (1999-2022)  
Super Conference Committee (2017-2019)  
BSD Instructional Support Trainer (2010-2017)  
New Teacher Mentor (2019-2020)  
Language Arts Department Chair, West Junior High School (2010-2015)  
Past Boise School District Common Core curriculum committee for English 9  
Student Teacher Supervisor/Mentor Teacher (11 student teachers)

**Professional Organizations**

National Council of Teachers of English  
Idaho Council of Teachers of English  
National Writing Project  
Boise State Writing Project  
National Education Association  
Boise Education Association

**Accolades and Recognition**

2019-2021 Master Educator Premium recipient  
2019 BSD Foundation Grant Recipient  
2017 Rotary Distinguished Educator  
2017 Century Link grant recipient  
2013 Teacher of the Month– West Junior High School  
2013 Idaho Council Teachers of English Teacher of the Year  
2013 NCTE Secondary Teacher of Excellence by the Idaho Council of Teachers of English  
2012 Rotary Distinguished Educator  
Yearbook competition awards– 1995-1998

**References**

Robb Thompson- Boise HS principal- [robb.thompson@boiseschools.org](mailto:robb.thompson@boiseschools.org)  
Stephanie Myers- Boise Education Association- [stephaniemyers@boiseea.org](mailto:stephaniemyers@boiseea.org)  
Brandon Bolyard- Vallivue School District Secondary Instructional Coach- [brandon.bolyard@vallivue.org](mailto:brandon.bolyard@vallivue.org)



**Objective:** A position on the Idaho Professional Standards Commission.

**Summary of Qualifications:**

- Bachelor's of Science in Communication
- Idaho Teaching Certification in Business Education and Basic Mathematics
- Excellent communication skills
- Proven customer service relations
- Flexible work practices, willingness to learn new positions
- Recognized time management skills
- Proficient with Microsoft Office programs including Word, Excel, PowerPoint, Access, Publisher, and various other programs including Dreamweaver, Photoshop, and InDesign
- Good leadership skills
- Have passing Praxis scores in Business Education and Basic Mathematics
- Idaho Business Education Association Outstanding Secondary Educator 2020

**Experience:**

Orofino Jr/Sr High School  
Orofino, ID

**Business/Technology Teacher**

August 2019-present

Teach a wide range of business and technology subjects ranging from Word, Excel, Access, PowerPoint, Publisher, Keyboarding, Interactive Media, Accounting, Yearbook and Computer Technology. Served as the Business Professionals of America advisor, Student Council advisor, and a class advisor. Plan and implement lesson plans, create pacing schedule for coursework, interact with students and other staff members.

North Idaho College  
Coeur d'Alene, ID

**Dual Credit Instructor**

August 2018-present

Teach a wide range of Computer Applications classes ranging from Word, Excel, Access, PowerPoint, Outlook, and Computer Fundamentals. Plan and implement lesson plans, create pacing schedule for coursework, interact with students and other staff members.

Bruneau-Grandview School District  
Bruneau, ID

**Business/Technology Teacher**

August 2017-May 2019

Teach a wide range of business and technology subjects ranging from Word, Excel, Access, PowerPoint, Publisher, Keyboarding, Interactive Media, Business Communications, Sports and Entertainment Marketing and Personal Finance. Served as the Business Professionals of America advisor, Student Council advisor, and a class advisor. Plan and implement lesson plans, create pacing schedule for coursework, interact with students and other staff members.

Dietrich School District  
Dietrich, ID

**Business/Technology Teacher**

September 2015-May 2017

Teach a wide range of business and technology subjects ranging from Word, Excel, Access, PowerPoint, Publisher, Keyboarding, Economics, Business Law, Interactive Media, Business Communications, Business Administration and Sports and Entertainment Marketing. Served as the Business Professionals of America advisor, Yearbook advisor, a class advisor and served on the leadership and the budget committees. Plan and implement lesson plans, create pacing schedule for coursework, interact with students and other staff members.

Lindsey McKinney

Spokane Falls Community College  
Pullman, WA

**Computer Applications/Business Technology Instructor**

September 2014-June 2015

Teach a wide range of computer application subjects ranging from beginning to advanced Word, Excel, Access, PowerPoint, Outlook, Publisher, and Keyboarding. Plan and implement lesson plans, create pacing schedule for coursework, interact with students and other staff members.

Mountain View School District #244  
Kooskia, ID

**Substitute Teacher**

January 2014-June 2015

Substituted in various positions including paraprofessional positions, teachers and the office staff. Also assisted in other duties including before and after school bus duty, recess duty, and lunch duty. Handled classroom interruptions, took attendance, answered a multiline phone system, and interacted with students and other staff members.

Dabco Property Management  
Pullman, WA

**Property Manager**

November 2009-December 2013

Perform Data entry, opening and closing procedures, interact with residents in person and on the phone, filing, checking the mail, creating documents, processing rent payments, compiling leases and other forms, Yardi, general office duties, technical troubleshooting, and other duties as assigned.

**Education:**

American College of Education

Indianapolis, IN

**M. Ed Advanced Studies Business**

Expected Spring 2023

Classes in Risk Management, Financial Management, Strategic Innovation and Entrepreneurship, Law, Labor and Negotiations, Information Systems, Marketing Management, Designing Courses and Programs, Online Learning and Teaching.

University of Idaho

Moscow, ID

**Communication**

2009

**Career and Technical Education**

Member of the U of I Marching Band, University Ambassador, Education classes, Integrated Business Curriculum, Accounting, Economics, other related business classes and several computer classes including Desktop Publishing using InDesign, Photoshop. Member of the U of I Chapter of Business Professionals of America. Treasurer for hall government, worked on projects on a team.

**Idaho Education Association Positions Held:**

IEA Board of Directors	August 2020-present
Orofino Education Association President	August 2019-present
IEA Human and Civil Rights Committee Chair	August 2017-present
IEA Human and Civil Rights Committee	January 2017- present
Presenter at Summer Institute	2017-present
Idaho Education Association Trainer	2019-present
NEA Leaders for Just Schools	2019-present
Bruneau-Grandview Association President	2017-2019
IEA Marketing and Branding Task Force	2017-2018
Dietrich Education Association President	2015-2017

**References:**

Available on Request

Eric McDowell, PhD.



Work: eric.mcdowell@sd283.org



2/22/2023

Professional Standards Commission  
Idaho State Department of Education  
650 West State Street  
Boise, ID 83702

Greetings,

My name is Eric McDowell and I am the current science teacher at Kendrick Jr./Sr. High School. For the past 10 years, I have been heavily involved in my school and community in a variety of roles beyond my duties as a teacher. I have been a city councilor, the treasurer of the Juliaetta Community Improvement Association, the President of the Kendrick Education Association, and the secretary of the Kendrick Lions Club. I am also a prolific and successful grant writer who has brought over \$100K into the Kendrick-Juliaetta community.

In my roles as a teacher and officer of my local teaching association, I have contributed to our local finally achieving an actual master agreement rather than the unofficial agreements that had existed since the late 1970s. This successful effort has played huge roles in minimizing teacher/staff turnover in my district as well as to make our small district competitive in Region 2. More recently, I was instrumental in my district in changing health insurance to the state health insurance, making insurance affordable for many district employees and their families.

I have dedicated much of my adult life to making both my school and its larger community a better place than I originally found it. Along the way, I have witnessed things I wish I could say I was making them up. It is my hope that my efforts could somehow prevent them from happening in the first place but one has to be realistic. Regardless, I am hopeful that I can further my profession and my student's futures by seeking a spot on Idaho's Professional Standards Committee.

Regards,

A handwritten signature in black ink that reads "Eric McDowell".

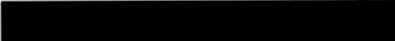
Eric McDowell, PhD



Eric McDowell, PhD.



Work: eric.mcdowell@sd283.org



**Education:**

- 1998 - 2003: Department of Molecular Biology and Biochemistry, University of Idaho, Moscow, Idaho; Degree: Bachelor of Science.
- 2003 - 2010: Department of Plant Science, University of Arizona, Tucson, Arizona; Degree: PhD in Plant Biology concerning plant trichome and rhizome biology.
- 2012-2014: Division of Education, Lewis-Clark State College, Lewiston, Idaho; Natural Science Teaching Certification.

**Teaching Experience:**

- Kendrick Jr./Sr. High School
  - 2012-present
  - Physical Science (9<sup>th</sup> grade)
  - Biology (10<sup>th</sup> grade)
  - Earth Science (8<sup>th</sup> grade)
  - Environmental Science (10-11<sup>th</sup> grades)
  - Physics (11-12<sup>th</sup> grades)
  - Chemistry (11-12<sup>th</sup> grades)
  - Integrative Science (9<sup>th</sup> grade)
  - New Teacher mentor
- NATS104, Plants and our World
  - Fall 2008, & 2009
  - Introductory botany/plant biology course for non-science majors
- PLS312, Plant and Animal Genetics
  - Spring 2007, 2008, 2009
  - Advanced genetic course for science majors
- Supervised/ trained summer interns and undergraduates lab assistants

**Awards:**

- 2005 - 2007: IGERT Research Fellow
- 2012 - Present: \$90,547 total in grants awarded
  - Avista Foundation - Solar Panels 2016: \$37,756.80
  - INL Classroom Improvement Grant - Apiaries 2015: \$4,998.00
  - Captain Planet Foundation - Apiaries 2015: \$2,499.09
  - Toshiba Foundation - Ghost Peppers 2015: \$1192.91
  - CapED Education Foundation - Ghost Peppers: \$703.00

- KJ7 Education Foundation - 3D Sandbox 2016: \$1,000.00
- Idaho Stem Action Center - Gold Project 2016: \$2,497.40
- LCCU Education Foundation - Composter Project 2017: \$500.00
- INL Mini Grant - Composter Project 2017: \$500.00
- Idaho Community Foundation - Bee Fab Project 2019: \$19,100.00
- NezPerce Education Foundation - Bee Fab Project 2019: \$8,000.00
- Innovia Education Foundation - Bee Fab Project 2019: \$5,300.00
- KJ7 Education Foundation -2019 Cooking/3D filament/Lab Safety: \$500.00
- NezPerce Education Foundation - Honey Dehydrator: \$6,000.00
- MJ Murdock Fellow - 2021-2023

**Memberships:**

- 2012 - Present: Kendrick Education Association member
- 2016 - Present: Kendrick Education Association Negotiator
- 2016 - 2019: Kendrick Education Association Vice-President
- 2019 - Present: Kendrick Education Association President
- 2019 - Present: Idaho Education Association/Center for Teaching and Learning Trainer
- 2019 - Juliaetta City Council
- 2018 - Present: Kendrick-Juliaetta Lions Club - Club Secretary
- 2020 - Present: Juliaetta Community Improvement Association

**Current Employer**

- Kendrick Joint School District #283; Kendrick, Idaho (Aug. 2012 - present)

**Publications:**

- **McDowell ET.** (2010) A tale of two 'omes: Comparative genomics and important genes in specialized tissues. PhD dissertation. University of Arizona, Tucson.
- **McDowell ET, Kapteyn J, Li C, Shi F, An L, Descour A, Kang JH, Schmidt A, Schillmiller A, Howe GA, A. Jones AD, Pichersky E, Wilkerson C, Soderlund CA, Gang DR** (2010) Comparative functional genomic analysis of *Solanum* glandular trichome types. *Plant Physiology*.
- **Kapteyn J, He R, McDowell ET, Gang DR.** (2010) Incorporation of non-natural nucleotides into template-switching oligonucleotides reduces background and improves cDNA synthesis from very small RNA samples. *BMC Genomics*. 11:413.

## Katie Rebholz Mathias



### Experience

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#### **Boise State University, Boise ID**

*Director of Assessment & Reporting, College of Education*

October 2022-present

- Direct the continuous improvement of teacher education programs across campus through research efforts, managing annual reporting measures, achieving state and national accreditation, meeting external data requests, and supporting internal procedures such as program assessment reporting
- Implement a systemic quality assurance system and design, launch, and manage a college-wide data dashboard for strategic recruitment and retention, clinical and community partnerships, and research and productivity
- Serve as primary communication liaison among stakeholders; from faculty and staff to external policy-making bodies

#### **College of Southern Idaho, Boise ID**

*Senior Coordinator, Early College*

August 2021-October 2022

- Spearhead strategic outreach to build quality, sustaining relationships between CSI and Treasure Valley schools to refine dual credit teaching and programming and assist students in the transition to college and post-secondary training and certification
- Serve as a liaison to the Office of the State Board of Education for the the Idaho Association of Collegiate Registrars and Admissions Officers (IACRAO) to increase go-on rates
- Assist in efforts towards continuous program improvement guided by state policy and national accreditation with the National Alliance of Concurrent Enrollment Partnerships (NACEP)

#### **K12 Stride Inc., Boise ID**

August 2019-2021

*Director, School Board and District Partner Relations*

- Established a data dashboard centralizing information from over 60 non-profit charter school boards and district partners and utilized reporting for transparency across national teams
- Overhauled internal management and external board relations by formulating standard procedures and implementing custom tools and targeted training
- Contributed to the start-up and renewal of charter schools across the country, including the support and training of new school board members

#### **Idaho State Department of Education, Boise ID**

April 2018-August 2019

*Coordinator, Professional Standards Commission*

- Managed the Professional Standards Commission on matters of educator licensure, teacher preparation, and professional ethics
- Planned, executed, and reported on state-wide educator preparation programs through Idaho and CAEP accreditation review processes to ensure compliance with educator preparation standards, including alternative routes to certification
- Continually revised educator preparation standards and endorsements by leading state-wide reviews and completing revisions to be incorporated through legislative rule

**Gem Prep, Boise ID**

*Student Advisor and English Teacher*

- Designed and taught all online secondary English courses; delivered career and college advising; administered, graded, and analyzed interim and summative IRI and ISAT testing (SBAC)

**K12 International High School, Boise ID**

May 2011-January 2014

*English and Electives Teacher, Community Events & Upper School Teacher Training Coordinator*

- Responsible for the teaching and management of 200+ online students per term; designed and led a comprehensive and detailed training for all new high school instructors; managed and promoted high school community activities

**Elizabeth Seton Academy, Boston MA**

September 2007-June 2011

*Teacher and Program Director*

- Classroom instructor of English, reading, public speaking, and debate courses and director of free after-school tutoring and support program; supervised and led all-school MAP testing; ran SAT prep summer courses and directed freshman summer orientation

**The Honorable Thomas J. Critchley, Jr., J.S.C., Newton NJ**

September 2006-September 2007

*Law Clerk*

- Assisted Judge in criminal, civil, and family court proceedings including detailed legal research and writing, preparing sentences, motions, and appeals
- Utilized negotiation skills to successfully mediate civil cases in order to promote fair settlements

**Education & Certification**

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<b>Idaho Education Credential</b>	Current
<i>Standard Secondary English 6-12</i>	
<b>American College of Education</b>	2011
<i>Master of Education (M.Ed.) in Curriculum and Instruction</i>	
<b>Vermont Law School</b>	2006
<i>Juris Doctor (J.D.)</i>	
<b>The Catholic University of America</b>	2002
<i>Bachelor of Arts (B.A.) in English Literature, minor in Philosophy</i>	
<b>University of KwaZulu-Natal</b>	2001
<i>Community Service and Public Policy Program</i>	

**Selected Achievements and Community Involvement**

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- *Second Vice-Chair, Serve Idaho - Governor's Commission for Community Service 2020-present*
- *Accreditation Reviewer, AdvancED/Cognia 2019-present*
- *Peer Reviewer, Idaho Charter School Program (CSP) Grants 2018-2022*
- *St. Mary's Food Bank Board Member, St. Mary's Food Bank 2017-2020*
- *Boise City Curb-It Pro Volunteer, 2018-2019*
- *Conference Presenter: Online Teacher Training, iNACOL 2013*
- *National Honor Society Board Member, K12 International School 2012-2013*
- *Special Education Team; Disciplinary Review Team Member, Elizabeth Seton Academy 2007-2011*
- *Student Government & Bar Association President, Vermont Law School 2005-2006*
- *Law Clerk, NJ Attorney General, Division of Criminal Justice, Appellate Bureau, Summer 2005*
- *Albert Schweitzer Fellow, Vermont Law School 2004 - 2005*
- *Community Service Award Recipient, AmeriCorps NCCC 2003*
- *Americorps National Civilian Community Corps (NCCC) Member, SE United States, 2002-2003*

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**Education:**

**Ph.D. Curriculum and Instruction** The Pennsylvania State University. May 2003  
**Emphasis Area** - Curriculum and Supervision.

**Dissertation Title:** *Living an Inquiry Stance Toward Teaching: Teachers' Perceptions of Teacher Inquiry within a Professional Development School Context.*

**M.A. Secondary Education** West Virginia University. December 1995  
**Emphasis Area** – Curriculum and Instruction, Secondary English Education.

**M.S. Journalism** West Virginia University. May 1995  
**Professional Project Title:** *The Benedum Project: A Professional Development School Portfolio.*

**B.S. Journalism (1993)** West Virginia University. May 1993  
**Emphasis Area** – Public Relations.

**Academic Positions:**

2014–present *Associate Dean and Professor*, College of Education, Boise State  
2012–2014 *Professor, Teacher Education Coordinator*, CIFS Department, Boise State  
2008–present *Associate Professor, Chair*, CIFS Department, Boise State University, ID  
2003–2008 *Assistant Professor*, CIFS Department, Boise State University, Boise, ID

**Teaching Assignments:**

**Boise State University, College of Education, Boise, ID**

**2015-16** - Liaison to elementary and secondary partner schools. Total: 11 candidates each semester.

**2014-15** – Liaison to elementary and secondary partner schools. Total: 15 candidates each semester.

**Summer 2014**

**ED-CIFS 506, *Issues in Education*.** Course required for all master's degree candidates in education focusing on historical and contemporary social, economic, and organizational issues influencing education. (21 students enrolled; overall instructor rating: 4.8)

Teaching (continued):

Fall 2013

**ED-CIFS 692, *Capstone Course*.** . Capstone course for MA in C&I students. Write and defend a synthesis paper (4 students)

**Partner School Liaison.** 11 Interns and Student Teachers in 6 different elementary, junior high, and high schools in four different school districts.

Summer 2013

**ED-CIFS 506, *Issues in Education*.** (20 students enrolled; overall instructor rating: 4.85)

**ED-CIFS 536, *Curriculum Planning and Implementation*.** (11 students enrolled; overall instructor rating: 4.71)

**ED-CIFS 692, *Capstone Course*.** (1 student; overall instructor rating: 5.0)

Spring 2013

**ED-CIFS 664, *Curriculum Seminar*.** (6 students enrolled; overall course instructor rating: 4.67)

**Partner School Liaison.** 18 elementary and secondary students in two districts.

Fall 2012

**ED-CIFS 692, *Capstone Course*.** (1 student; overall instructor rating: 5.0)

**ED-CIFS 692, *Directed Research*.** (1 student)

**Partner School Liaison.** 14 elementary and secondary students in four districts.

Summer 2012

**ED-CIFS 692, *Capstone Course*.** (3 students)

**ED-CIFS 506, *Issues in Education*.** (17 students enrolled; overall instructor rating: 4.29)

Spring 2012

**PDS Liaison.** 19 Interns and Student Teachers in Elementary. 3 secondary student teachers

Fall 2011

**ED-CIFS 332, *Elementary Classroom Learning Environments*.** Course focusing on principles of classroom management for democratic classroom communities for student teacher interns pursuing elementary certification. Taught in “hybrid” format. (29 students enrolled; overall instructor rating: 4.24)

**PDS Liaison,** 19 Elementary Interns and Student Teachers

Teaching (continued):

Summer 2011

**ED-CIFS 600**, *Capstone Course*. Capstone course for MA in C&I students. Write and defend a synthesis paper. (7 students)

**ED-CIFS 332**, *Elementary Classroom Learning Environments*. (30 students enrolled; overall instructor rating: 4.24)

Spring 2011

**ED-CIFS 600**, *Capstone Course*. (7 students)

**ED-CIFS 664**, *Doctoral Curriculum Seminar*. Doctoral course serving as a capstone seminar study of curriculum. Includes a scholarly writing emphasis. (7 students)

**ED-CIFS 332**, *Elementary Classroom Learning Environments*. (30 students enrolled)

**PDS Liaison**, 5 student teachers

Fall 2010

**ED-CIFS 600**, *Capstone Course*. (7 students; overall instructor rating: 4.6)

**ED-CIFS 506**, *Issues in Education*. (30 students enrolled).

**ED-CIFS 332**, *Elementary Classroom Learning Environments*. (27 students enrolled; overall instructor rating: 4.93)

**PDS Liaison**, 5 Professional Year Interns; 1 Student Teacher

Summer 2010

**ED-CIFS 600**, *Capstone Course*. (7 students enrolled; overall instructor rating: 4.6)

**ED-CIFS 536**, *Curriculum Planning and Implementation*. (10 students enrolled – 2 instructors. Only narrative comments provided on evaluation.)

**ED-CIFS 506**, *Issues in Education*. (45 students enrolled – 2 instructors; overall instructor rating: **4.17**)

**ED-CIFS 332**, *Classroom Learning Environments*. (21 students enrolled; overall instructor rating: 4.72)

Spring 2010

**ED-CIFS 664**, *Doctoral Curriculum Seminar*. (8 students; overall instructor rating: 4.67)

**ED-CIFS 332**, *Elementary Classroom Learning Environments*. (28 students enrolled; overall instructor rating: 4.76)

**PDS Liaison**, 6 student teachers, 2 PY Interns at 2 elementary schools

Teaching (continued):

Fall 2009

**ED-CIFS 661**, *Pedagogical Practices in Education*. Doctoral level course focusing on pedagogical issues in teaching and teacher education. (13 students enrolled; overall instructor rating: **4.69** with **5.0 being the highest rating**)

**ED-CIFS 506**, *Issues in Education*. (24 students enrolled)

**PDS Liaison**, 1 student teacher, 6 PY Interns at 2 elementary schools

Summer 2009

**ED-CIFS 506**, *Issues in Education*. (38 students enrolled – 2 instructors; overall instructor rating: **4.6**)

**ED-CIFS 332**, *Classroom Learning Environments*. (20 students enrolled; overall instructor rating: 4.8)

Spring 2009

**PDS Liaison**, 7 student teachers at 1 elementary and 1 junior high school

Fall 2008

**ED-CIFS 661**, *Current Issues in Teaching*. (10 students enrolled; overall instructor rating: **1.10** with **1.0 being the highest rating**)

**ED-CIFS 506**, *Issues in Education*. (2 sections – 10 and 12 enrolled respectively; **1.0** overall instructor rating.)

**PDS Liaison**, 6 PY interns at 1 elementary school

Summer 2008

**ED-CIFS 506**, *Issues in Education*. (15 students; **1.2** overall instructor rating.)

**ED-CIFS 332**, *Elementary Classroom Learning Environments*. (22 students enrolled; **1.09** overall instructor rating.)

Spring 2008

**ED-CIFS 664**, *Doctoral Curriculum Seminar*. (6 students; **1.0** overall instructor rating.)

**PDS Liaison**, 6 student teachers at 1 elementary school

Fall 2007

**ED-CIFS 661**, *Current Issues in Teaching*. (6 students enrolled; 1.4 overall instructor rating.)

**ED-CIFS 506**, *Issues in Education*. (13 students enrolled; 1.15 overall instructor rating.)

**PDS Liaison**, 6 PY interns at 1 elementary school



Teaching (continued):

Summer 2007

ED-CIFS 332, *Elementary Classroom Learning Environments*. (11 students; 1.18 overall instructor rating.)

Spring 2007

ED-CIFS 577, *Leading Teaching and Learning*. Module for students in new educational leadership program. Particular area of emphasis was reflective supervision of teaching and learning by and for school leaders. (17 students enrolled; 1.6 overall instructor rating.)

ED-CIFS 664, *Doctoral Curriculum Seminar*. (7 students enrolled; 1.0 overall instructor rating.)

**Other Teaching Assignments:**

ED-CIFS 575, *Teacher Leadership*

ED-BLESL 600, *Capstone Seminar*

ED-CIFS 231, *Introduction to Teaching and Learning*

ED-LTCY 597, *Social Justice Through Literacy*

ED-CIFS 581, *School Law*

ED-CIFS 597, *School, Family, and Community Partnerships*

ED-CIFS 230, *Introduction to Teaching/Block 1 Field Experience*

**Graduate Assistantships:**

1999-2003     *Teaching-Research Assistant*, Department of Curriculum & Instruction, The Pennsylvania State University, University Park, PA. Taught the following courses: *Teacher as Researcher*, *Classroom Learning Environments*, *Principles of Instructional Supervision*, *Secondary Teaching*

1993-1995     *Teaching-Research Assistant*, The Benedum Collaborative, College of Education, West Virginia University, Morgantown, WV. Taught *Foundations of Education* and conducted research/evaluation for PDS as well as published newsletter.

**Supervision and School Partnership Work:**

**Boise State University, College of Education, Boise, ID**

2014–Present. *Associate Dean*. Coordinate, facilitate, supervise. Accreditation reporting.

**2012–2014.** *Teacher Education Coordinator* – Coordinate all field

placements/experiences for elementary and secondary teacher education; facilitate unit governance meetings and work committees; participate in unit assessment and reporting.

**2003–Present.** *Liaison* – Supervise elementary and secondary school student teacher interns in placements at local partnership schools. Serve as university liaison to partnership school, hold meetings with interns and mentor teachers, facilitate intern placements at elementary and middle schools, and meet with ad-hoc Professional Development School committee. Served on the committee to revise Professional Year Field Guides and assessments. Developed PDS partnership with area elementary school.

**The Pennsylvania State University, College of Education, University Park, PA**

**2002–2003.** *Professional Development Associate* – University-based partner in State College Area School District-Penn State University Elementary PDS Partnership (ATE2002 Distinguished Program Award Winner). Supervised elementary school interns in a yearlong, integrated PDS program. Observed weekly, promoted reflective teaching, supported teacher inquiry, and lead field experience seminars. Collaborated with mentor teachers on teacher development and performance-based assessment of interns. Conducted annual program evaluations.

**1999–2001.** *Field Experience Supervisor* – Supervised prospective teachers in pre-student teaching field experience in secondary social studies, math, and foreign languages at selected secondary level schools. Conducted a weekly seminar on field experience issues.

**North Marion High School, Professional Development School,**

Marion County, WV

**1998 – 1999.** *Teacher Education Coordinator* – School-based partner in West Virginia University's Benedum Collaborative, a PDS partnership involving 21 public schools in a five county range from WVU. Coordinated placement of prospective teachers (interns). Observed and evaluated performance and planned orientations and professional development seminars during three-year program. Assisted with and provided guidance for intern action research projects. Contributed to the creation of assessment instruments for prospective teachers and the planning of field experience curriculum.

**West Virginia University, College of Education and Human Resources,**

Morgantown, WV

**1993 – 1995.** *Assistant to PDS Director* – Served as graduate assistant in The Benedum Collaborative. Published the Collaborative's monthly newsletter concerning school reform and PDS, handled publicity for public events, and constructed news releases. Participated in meetings and conferences with university and public school personnel on simultaneous renewal, served as a liaison between the University and various PDS sites in West Virginia and planned with colleagues for professional development and the implementation of WVU's redesigned teacher preparation program (Holmes Group model). Analyzed data for program evaluation and conducted interviews for assessment data set.

Professional Teaching Positions:

- 1997-1999 *High School Teacher*. North Marion High School, **Professional Development School**, Marion County, WV. Taught *Journalism I, II, and III; Creative Writing* – introductory and advanced courses in journalism, newspaper, yearbook, and school publicity (grades 9 – 12). Contributed to the creation of county and state standards for journalism curriculum. Advised monthly publication of award-winning student newspaper and yearbooks. Managed Journalism Department finances. Handled news releases and school publicity.
- 1996 *Adjunct Instructor*. Fairmont State College, Department of Language and Literature, Fairmont, WV. Taught: *Journalism History, The Publications Process*, and *English Composition* and advised weekly college newspaper.
- 1995 *Student teacher/Intern*. Morgantown High School, Morgantown, WV. Taught in 7<sup>th</sup> – 9<sup>th</sup> grade English classes as well as 11<sup>th</sup> grade English and journalism classes in middle and high school level Professional Development Schools. Advised monthly publication of the student newspaper. Taught an integrated *Linking the Humanities* course with social studies teacher.

Research and Scholarship:

**Refereed Articles**

- Snow, J.L.**, Dismuke, S.D., Zenkert, A.J., & Loffer, C. (in press). Re-culturing Educator Preparation Programs: A Collaborative Case Study of Continuous Improvement. Re-submitted to *The Teacher Educator*.
- Snow, J.L.**, Martin, S.D., & Dismuke, S. (2015). "We do more than discuss good ideas": A Close Look at the Development of Professional Capital in an Elementary Education Liaison Group. *Teacher Education Quarterly* (42), 2, pp. 43-63.
- Thiede, Keith W.; Brendefur, Jonathan L.; Osguthorpe, Richard D.; Carney, Michele B.; Bremner, Amanda; Strother, Sam; Oswalt, Steven; and **Snow, Jennifer L.** (2015). "Can Teachers Accurately Predict Student Performance?" *Teaching and Teacher Education*, 49, 36-44.
- Snow, J.L.** & Martin, S.D. (2014). Confessions of Practice: Multi-dimensional Interweavings of our Work as Teacher Educators. *The New Educator*, 10 (4), 331 – 353.
- Snow, J.L.** & Zenkert, A. J. (2012). Positions toward Inquiry: Partners in Knowledge Construction and Teacher Development Across the Professional Life Span. *Swiss Journal of Education*.

Research and Scholarship (continued):

**Refereed Articles (continued)**

- Martin, S. **Snow, J.L.** & Torrez, C. (2011). Navigating the Terrain of Third Space: Tensions With/In Relationships in School-University Partnerships. *Journal of Teacher Education*, 62 (3) 299 - 311.
- Snow-Gerono, J.L.** (2010). Living an Inquiry Stance Toward Teaching in School-University Partnerships. *Teacher Education and Practice*, 23(3), 331 – 334.
- Snow-Gerono, J.L.** (2009). Voices less silenced: What do veteran teachers value in school-university partnerships and initial teacher preparation? *The Teacher Educator*, 44(4).
- Snow-Gerono, J.L.** & Gregory, A. (2009). Which path to educational equity? External policy influences internal school goals. *Interchange*, 40 (1), 1 - 22.
- Snow-Gerono, J.L.**, Dana, N.F., & Nolan, J.F. (2008). Following up with PDS graduates: An emergent theory of novice teacher leadership. *School-University Partnership Journal*, (2), 2, 55 - 68.
- Snow-Gerono, J.L.** (2008). Locating supervision: A reflective framework to negotiating tensions within conceptual and procedural foci for teacher development. *Teaching and Teacher Education* (24), 1502 - 1515.
- Hale, A., **Snow-Gerono, J.L.**, & Morales-Brendefur, F., (2008). Transformative education for culturally diverse learners through narrative and ethnography. *Teaching and Teacher Education*. (24), 6, 1413-1425.
- Snow-Gerono, J.L.** & Budge, K. (2008). Subject, self, and social for leadership of place. *Academic Exchange Quarterly* (12), 2, 150 - 154.
- Franklin, C.A. & **Snow-Gerono, J.L.** (2007). Perceptions of Teaching in an Environment of Standardized Testing: Voices from the Field. *The Researcher*(21), 1, 2 - 21.
- Freedman, D. M., **Snow, J.**, Slonaker, A., Antrop-Gonzalez, R., Duo, P. C., Huang, Hsiu-Ping (2006). Yearbook Disclosure In/Ex-Clusion: Excavating Past Dirt, Identity, and Memory. *Journal of Curriculum Theorizing* (22) 4, 123 - 134.
- Snow-Gerono, J.L.** & Franklin, C.A. (2006). Mentor Teachers Share Views on NCLB Implementation: What are the Affects on Initial Teacher Preparation? *Kappa Delta Pi Record* (43), 1, 20 - 24.
- Henning, M.B., **Snow-Gerono, J.L.**, Reed, D. & Jones, A. (2006). Listening to children think critically about Christopher Columbus. *Social Studies and the Young Learner* (10), 2, 19 - 22.

**Research and Scholarship (continued):**

**Refereed Articles (continued)**

- Dana, N.F., Yendol-Silva, D. & **Snow-Gerono, J.L.** (2006). Deconstructing Inquiry: Exploring the Domains and Contents of Teachers' Questions. *Action in Teacher Education*, 27 (4), pp. 59 - 71.
- Snow-Gerono, J.L.** (2005). Naming inquiry: PDS teachers' perceptions of teacher research and living an inquiry stance toward teaching. *Teacher Education Quarterly*, 32 (4) pp. 79 - 95.
- Snow-Gerono, J.L.** (2005). Professional Development in a Culture of Inquiry: PDS Teachers Identify the Benefits of Professional Learning Communities. *Teaching and Teacher Education*, 21(3) 241-256.
- Gregory, A., Rawley, M.A., Rogien, L.R., **Snow-Gerono, J.**, & Yates, D.L. (2005). A Factious Analogous Analysis of *No Child Left Behind* Through the Lens of *Harry Potter and the Order of the Phoenix*. *The Researcher*, 19 (1) pp. 42 - 52.
- Snow-Gerono, J.L.**, Yendol-Silva, D. & Nolan, J.F. (2002). Reconceptualizing curriculum for the PDS: University faculty negotiate tensions in collaborative design of methods courses. *Action in Teacher Education*, 24 (3), 63 - 73.
- Dana, N.F., Yendol-Silva, D., & **Snow-Gerono, J.** (2002). Building a culture of inquiry in a Professional Development School. *Teacher Education & Practice*, 15(4), 71-89.
- Bullock, P., Park, V., Rodriguez, E., & **Snow, J.L.** (2002). Redefining interdisciplinary curriculum: Collaboration and change in secondary teacher education. *Interchange*, 33 (2), 159 - 182.
- Snow-Gerono, J.**, Dana, N.F., & Silva, D.Y. (2001). Where are they now? PDS interns emerge as first-year teacher leaders. *The Professional Educator*, 24 (1), 35 - 48.

**Book Chapters**

- Torrez, C.A. F., **Snow-Gerono, J.L.**, & Martin, S. (2011). Negotiating Complex Relationships in School-University Partnerships: Befuddled, Bewildered, and Even Bemused. In Nath, J.L., Ramsey, J., Guadarrama, I. (Eds.) *Investigating University/School Partnerships: A Volume in Professional Development School Research. Professional Development School Research Volume IV.* (249 - 268), Information Age Publishing.
- Osguthorpe, R. & **Snow-Gerono, J.L.** (2010). Decorating for NCATE. In Pinnegar, S. (Ed.) *Tensions in Teacher Preparation: Accountability, Assessment, and Accreditation, Volume 12* within the *Advances in Research on Teaching*. (pp. 35 - 54). Emerald Group Publishing Inc.

**Research and Scholarship (continued):**

**Book Chapters (continued)**

- Gregory, A. & **Snow-Gerono, J. L.** (2010). Embracing alternatives: Examining family constructs in the stories of early childhood. In Carole Rhodes & Lori Wolf (Eds.). *Exploring social justice issues in teacher education*. (pp. 77 – 105).
- Snow-Gerono, J.L.** (2008). Portraits of an inquiry stance toward teaching: Exploring explicit relationships between inquiry and PDS. In Guadarrama, I., Ramsey, J., & Nath, J. (Eds.) *Research in Professional Development School Series, Volume 3*. (pp. 295 – 317). Charlotte, NC: Information Age Publishing.
- Gregory, A. & **Snow-Gerono, J.L.** (2008). Understanding early literacy learning and teaching. In Larocque, M. & Darling, S.M. (Eds.) *Blended curriculum in the inclusive K-3 classroom: Teaching ALL young children*. Boston: Pearson Education.
- Snow-Gerono, J.L.** & Franklin, C.A. (2007). Accountability System's Narrowing Effect on Curriculum in the United States: A Report Within an Elementary Education Teacher Certification Program. L. Deretchin & C. Craig (Eds.) *ATE Teacher Education Yearbook XV: International Perspective on Accountability Systems and Their Impact on Students, Society and Teacher Preparation* (pp. 97 – 112). Scarecrow Education Publications.
- Snow-Gerono, J.L.** (2007). Calling for democratic education through curriculum work... In J.D. Marshall, J. Sears, Allen, L., Roberts, P., & Schubert, W. *Turning points: A contemporary American memoir*, (Afterword), (pp. 273-277) New Jersey: Prentice-Hall.
- Antrop-Gonzalez, R., Freedman, D. M., **Snow-Gerono, J.**, Slonaker, A., Duo, P. C., & Huang, Hsiu-Ping (2006). Understanding school culture: In/Exclusion within yearbook discourses. In D. E. Armstrong and B. J. McMahon (Eds.). *Inclusion in urban educational environments: Addressing issues of diversity, equity, and social justice*. Greenwich, CT: Information Age Publishing.
- Snow-Gerono, J.L.** & Franklin, C.A. (2006). Teacher Education in an Era of Standardization and Accountability: Elementary School Teachers Share their Perceptions of Teaching and Mentoring in an Environment of Testing. Proceedings for the 4<sup>th</sup> Annual Hawaii International Conference on Education, January, ISSN# 1541-5880.
- Snow-Gerono, J.L.** & Slonaker, A.L. (2004). Finding our discursive selves: Examining positionality and (silent) voices in school-university partnerships. In L. Coia, N. Brooks, S.J. Mayer, P. Pritchard, E. Heilman, M.L. Birch, & A. Mountain. (Eds.) *Democratic Responses in an Era of Standardization* (pp. 51 - 69), Troy, NY: Educators International Press, Inc.

achievement may narrow the scope of learning. *Idaho Issues Online*.

**Research and Scholarship (continued):**

**Book Reviews**

**Invited**

Dismuke, S. & Snow, J.L. (2015). *IN/Exclusion in Elementary Education Learning Environments: A Book Review of Effective Inclusion Strategies for Elementary Teachers*. Teachers College Record on-line publication [www.tcrecord.org](http://www.tcrecord.org)

**Snow-Gerono, J.L.** (2004). Journeying for Social Justice: A Review of Walking the Road: Race, Diversity, and Social Justice in Teacher Education. *Teachers College Record* on-line publication [www.tcrecord.org](http://www.tcrecord.org), May 10, 2004 issue.

**Snow-Gerono, J.L.** (2003). Who is asking the questions? A review of Disturbing PrActice: Reading teacher education as text. *Teaching Education*, 14 (3) 339 - 341.

**Snow, J.L.** and Marshall, J.D. (2002). The more things change...: Rediscovering stubbornness and persistence in school-university collaborations [A review of *Collaborative reform and other improbable dreams*]. *Journal of Curriculum Studies*, 34 (4), 481 - 494.

**Publications Under Review**

**Snow, J.L.**, Wenner, J., & Dismuke, S., (2017). Professional Positioning as Inquiry: A Key to the Early Years of Teaching. *Journal of Teacher Education*.

**Snow, J.L.**, Dismuke, S., Loffer, C. & Eliaison, M. (2016). Complicating Complexity in Teacher Development: Inquiry Communities in Induction. *The New Educator*.

**Grants**

Enright, E. **Snow, J.L.**, Dismuke, S. (2016, Summer). Investigating the Phenomenon of Feedback in Teacher Preparation: How Might it Influence Teacher Development and K-12 Student Learning? Grant proposal submitted to the Institute of Education Sciences.

Thiede, K., Semmelroth, C., **Snow, J.L.**, Cross, K., & Seibert, C. (2016). *Evaluating teachers with Danielson Framework for Teaching*. Grant proposal accepted by Idaho State Board of Education, (\$200,000). Not Funded

**Grants (continued):**

Thiede, K., Osguthorpe, R.D., Brendefur, J. & Snow, J. (2012). *Improving teaching and classroom assessment by investigating the accuracy of student performance monitoring*. Grant proposal submitted to the U.S. Department of Education, Institution of Education Sciences (CASL) (\$1,391,745). Funded

*Professional Development in Content Area Literacy*. No Child Left Behind Act of 2001 Eligible Partnership Subgrants. (Submitted with **Co-Principal Investigators** Anne Gregory, **Jennifer L. Snow-Gerono**, and Lee Dubert; and Susan Martin, Rosemary Palmer, Tanya Peters, Stan Steiner, and Roger Stewart (2006-2007). **Funded: \$200,000.**

*Social Justice Through Literacy*. Research project in Southwestern Idaho elementary school. **Jennifer L. Snow-Gerono** and Anne Gregory (2004 – 2005). Boise State University Faculty Research Grant **funded: \$4,998.**

*Helping Adolescent Readers and Their Teachers: Collaborative Virtual Professional Development*. Teacher Quality Research – Reading and Writing Grants (Total Budget Requested: \$1,500,000). Submitted and denied with Principal Investigator Lee Dubert; Susan Martin, Anne Gregory, Rosemary Palmer, Roger Stewart, **Jennifer L. Snow-Gerono**, and Mary Ann Rawley (2005 – 2008).

*Changing the Nature of Instruction: Professionalizing Teaching and Learning*. Teacher Quality Grant submitted and denied (\$676,726) Jonathan Brendefur, Anne Gregory, and **Jennifer L. Snow-Gerono** (2004 – 2007).

**Evaluation/Technical Reports**

**Snow, J.L.** (2015). *Boise State Self-Study*. Submitted to Council for Accreditation of Educator Preparation.

**Snow-Gerono, J.L.** (2002). *The Professional Development School Story continued: Assessing the impact of year four (2001 – 2002) of the State College Area School District – Pennsylvania State University Elementary Professional Development Schools*. Submitted to the State College Area Board of School Directors.

**Snow-Gerono, J.L.,** Dana, N.F., & Nolan, J.F. (2002). *The Professional Development School Story continued: Assessing the impact of year three (2000 – 2001) of the State College Area School District – Pennsylvania State University Elementary Professional Development Schools*. Submitted to the State College Area Board of School Directors.

SCASD-Penn State Elementary PDS Partnership. (2002). *Simultaneous Renewal Through Inquiry*. Application report submitted to the Association of Teacher Educators for the 2002 Distinguished Program in Teacher Education.



**Evaluation/Technical Reports (continued):**

Nolan, J., **Snow, J.**, and Lehman, H. (2000). *The Professional Development School Story continued: Assessing the impact of year two (1999 – 2000) of the State College Area School District – Pennsylvania State University Elementary Professional Development Schools*. Submitted to the State College Area Board of School Directors.

**International/National Conference Presentations**

**Snow, J.L.** & Dismuke, S. (2016, October). Complicating Complexity. Paper presented at the annual COPIS Conference, Tampa, FL.

Enright, E., **Snow, J.L.**, & Dismuke, S. (2016, October). Investigating the Phenomenon of Supervisor Feedback. Paper presented at the annual COPIS Conference, Tampa, FL.

**Snow, J.L.**, **Dismuke, S.**, **Zenkert, A.J.**, **Loffer, C.** (2016, April). Teacher Performance Assessment: Living an Inquiry Stance Toward Teaching Teachers, Paper presented at the annual American Educational Research Association, Washington, D.C.

Dismuke, S., **Snow, J.L.**, & Eliaison, M. (2016, April). The First Years: A Case Study of Educator Preparation Program Completer Effectiveness. Paper presented at the annual American Educational Research Association, Washington, D.C.

Dismuke, S., **Snow, J.L.**, Eliaison, M., & Loffer, C. (2016, April). Re-Visioning Teacher Education Program Evaluation and Teacher Induction: A Mutually Beneficial Inquiry of Teacher Effectiveness. Paper presented at the annual American Educational Research Association, Washington, D.C.

**Snow, J.L.** (2015, April). *Supervisor Feedback Based on Purpose and Role: A Self-study of Observation Feedback for Teacher Candidates*. Paper presented at the annual American Educational Research Association, Chicago, IL.

**Snow, J.L.** (2015, April). *Implementing the Common Core State Standards in Elementary Schools: A Case Study of Voices from the Field*. Paper presented at the annual American Educational Research Association, Chicago, IL.

Dismuke, S. **Snow, J.L.**, Zenkert, A. J., & Loffer, C. (2015, April). *Embracing Transformation in Teacher Preparation: A Collaborative Case Study of Piloting Initiatives for Program Improvement*. Paper presented at the annual American Educational Research Association, Chicago, IL.

Dismuke, S., **Snow, J.L.**, & Martin, S. (2015, April). *Developing Professional Capital in an Elementary Education Liaison Group*. Paper presented at the annual American Educational Research Association, Chicago, IL.

Research and Scholarship (continued):

**International/National Conference Presentations (continued)**

Thiede, K. W., Brendefur, J., Carney, M., Osguthorpe, R., Snow, J., Bremner, A., Oswalt, S., & Woodard, S. (2013). *A Metacognitive Model of Teaching*. Poster presented at the 2013 Annual Meeting of the Psychonomic Society, Toronto, Canada.

**Snow, J.L.**, & Martin, S.M. (2013, April). Confessions of Practice. Paper presented at the annual meeting of the American Educational Research Association. San Francisco, CA.

Martin, S. M., **Snow, J.L.**, Osguthorpe, R.D., Coll, K. & Boothe, D. (2012, *February*). Engaging in Third Space: Implementing a Shared Leadership Model in One Teacher Education Unit. Symposium presented at the annual meeting of the American Association of Colleges and Teacher Education, Chicago, IL.

**Snow, J.L.** & Zenkert, A. J. (2012, *February*). Shared Supervision Structures for Enhanced Partnerships and Meaningful Clinical Experience. Paper presented at the annual meeting of the Association of Teacher Educators, San Antonio, TX.

Martin, S. M., **Snow, J.L.**, & Torrez, C.A. (2011, April). Navigating the Terrain of Third Space: Tensions With/In Relationships in School-University Partnership. Paper presented at the annual meeting of American Educational Research Association, New Orleans, LA.

**Snow, J.L.**, Hansen, F.B., Zenkert, A. J., & Gregory, A.E. (2011, April). Studying High-Quality Teachers Through Responsibly Just Engagement. Paper presented at the annual meeting of American Educational Research Association, New Orleans, LA.

**Snow, J.L.** & Zenkert, A. J. (2011, April). Inquiry Communities for an Inquiry Stance Toward Teaching at Multiple Levels. Poster presented at the annual meeting of American Educational Research Association, New Orleans, LA.

**Snow, J.L.**, Coll, K., Martin, S. M., Osguthorpe, R.D. & Boothe, D. (2011, February). Telling the Story of Teacher Education Team (TET): Insights, Challenges and Connections to Outcomes. Interactive Dialogue at the annual meeting of the American Association of Colleges of Teacher Education, San Diego, CA.

**Snow, J.L.** & Zenkert, A. J. (2010, October). Cultivating Inquiry Stance. . . . Paper presented at the annual meeting of Curriculum and Pedagogy Conference, Akron, Ohio.

Research and Scholarship (continued):

**International/National Conference Presentations (continued)**

- Snow, J.L.**, Hansen, F.B., Zenkert, A. J., & Gregory, A. E. (2010, April/May). Responsibly Just Engagement: Designing Systems and Frameworks for High Quality Teaching. Paper presented at the annual meeting of American Educational Research Association, Denver, CO.
- Snow, J.L.** & Zenkert, A. J. (2010, April/May). Cultivating an inquiry stance toward teaching: Authentic modeling and practice. Paper presented at the annual meeting of American Educational Research Association, Denver, CO.
- Torrez, C.A. & **Snow, J.L.** (2010, February). Four Years Later--Not Much Has Changed: Teaching in a Testing Environment. Paper presented at the annual meeting of Association of Teacher Educators, Chicago, IL.
- Snow, J.L.**, Hansen, F.B., Zenkert, A. J., & Gregory, A. (2009, October). Educating for responsibly just engagement: What will it take to ensure high quality experiences. Paper presented at the annual meeting of Curriculum and Pedagogy Conference, Decatur, GA.
- Bullock, P. & **Snow, J.L.** (2009, October). Teacher educator and LGBTQ issues: Why are we seeing straight? Paper presented at the annual meeting of Curriculum and Pedagogy Conference, Decatur, GA.
- Gregory, A.E., Cahill, M.A., **Snow-Gerono, J.L.**, Zenkert, A. J., Walther, J. VonMaur, A. (2008, December). Questioning texts: An analytic look at the texts of research-based programs. Paper presented at the annual meeting of the National Reading Conference,
- Snow-Gerono, J.L.** (2008, October). Supervision in teacher education: Collaborative inquiry groups to move 'beyond the triad.' Paper presented at annual meeting of Curriculum and Pedagogy Conference, Decatur, GA.
- Zenkert, A.J. & **Snow-Gerono, J.L.** (2008, October). Male elementary school teachers: Characteristics with/in the life of 'other.' Paper presented at annual meeting of Curriculum and Pedagogy Conference, Decatur, GA.
- Snow-Gerono, J.L.** (2008, March). Voices less silenced? Perceptions of inservice teachers in education reform for initial teacher preparation. Paper presented at annual meeting of American Educational Research Association, New York, NY.
- Franklin, C.A., **Snow-Gerono, J.L.** Martin, S. (2008, March). Befuddled, bewildered, and even bemused: A self-study of teacher educators in school-university partnerships. Paper presented at annual meeting of American Educational Research Association, New York, NY.

Research and Scholarship (continued):

**International/National Conference Presentations (continued)**

Bullock, P.L., Slonaker, A., **Snow-Gerono, J.L.**, Espinosa-Dulanto, M., Duque, G., & Slonaker, B. (2008, March). Social justice educators. Roundtable presented at annual meeting of American Educational Research Association, New York, NY.

Budge, K. & **Snow-Gerono, J.L.** (2007, November). *A 'Red' State, White Aspiring Leaders, and 'Blue' Faculty: Place, Politics, and Social Justice*. Paper presented at 21<sup>st</sup> Annual University Council for Education Administration Conference, Washington, D.C.

**Snow-Gerono, J.L.** (2007, October). *Balancing Teacher and Student Inquiry for Growth in a Democracy: A School-University Partnership in an Age of Accountability*. Presentation at the 8<sup>th</sup> Annual Curriculum and Pedagogy Conference, Balcones Springs, Texas.

Budge, K. & **Snow-Gerono, J.L.** (2007, October). *Critical Place-conscious Leaders: "Blue" Faculty and White Aspiring Leaders in a Red State*. Presentation at the 8<sup>th</sup> Annual Curriculum and Pedagogy Conference, Balcones Springs, Texas.

Gregory, A., **Snow-Gerono, J.L.**, Loffer, C., & Cahill, M.A. (2007, October). *Constructing Critical Literacy: Self-reflexive Ways for Curriculum and Pedagogy*. Presentation at the 8<sup>th</sup> Annual Curriculum and Pedagogy Conference, Balcones Springs, Texas.

Bullock, P., Slonaker, A., **Snow-Gerono, J.**, Slonaker, B., Espinosa, M., Duque, G. (2007, October). *Coming out as social justice educators: Conflicts and dilemmas in mainstream institutions*. Presentation at the 8<sup>th</sup> Annual Curriculum and Pedagogy Conference, Balcones Springs, Texas.

**Snow-Gerono, J.L.**, Peters, T., Gregory, A., & Palmer, R. (2007, April). *Professional development for teacher leadership: Democracy within and across secondary schools for teaching for understanding*. Paper presentation at annual meeting of American Educational Research Association, Chicago, Illinois.

Franklin, C.A. & **Snow-Gerono, J.L.** (2007, April). *Novice teachers and accountability: Realities of working towards quality education*. Paper presentation at annual meeting of American Educational Research Association, Chicago, Illinois.

Franklin, C.A. & **Snow-Gerono, J.L.** (2007, February). *Accountability Systems' Narrowing Effect on Curriculum in the United States: A Report Within an Elementary Education Teacher Certification Program*. Invited presentation at the annual meeting of the Association of Teacher Educators, San Diego, CA.

**Snow-Gerono, J.L.** & Gregory, A. (2006, October). *Imagining safe (con)texts: Curriculum of family constructs and stories of early childhood*. Roundtable discussion at annual meeting of the Curriculum and Pedagogy Group, Balcones Springs, Texas.

Research and Scholarship (continued):

**International/National Conference Presentations (continued)**

- Bullock, P., **Snow-Gerono, J.L.**, Slonaker, A., Darcy, G.D., Slonaker, B., & Antrop-Gonzalez, R. (2006, October). *Curriculum workers network: Fostering support of social justice research action across diverse locations and contexts*. Paper presentation at annual meeting of the Curriculum and Pedagogy Group, Balcones Springs, Texas.
- Snow-Gerono, J.L.** & Gregory, A. (2006, April). *Working toward social justice through literacy within a 'standardized' context of professional development*. Paper presented at annual meeting of the American Educational Research Association, San Francisco, CA.
- Gregory, A. & **Snow-Gerono, J.L.** (2006, April). *Imagining alternatives: Family constructs, stories of early childhood, and making ready for children*. Paper presented at annual meeting of the American Educational Research Association, San Francisco, CA.
- Franklin, C.A. & **Snow-Gerono, J.L.** (2006, April). *Agency and frustration: Preservice teachers' perceptions of teaching in an environment of testing and accountability*. Paper presented at annual meeting of the American Educational Research Association, San Francisco, CA.
- Franklin, C.A. & **Snow-Gerono, J.L.** (2006, January). *Teacher education in an era of standardization and accountability: Elementary school teachers share their perceptions of teaching and mentoring in an environment of testing*. Paper presented at the Hawaii International Conference on Education, Honolulu, Hawaii.
- Gregory, A. & **Snow-Gerono, J.L.** (2005, December). *Literacy as transformative practice: Teachers' inquiry into social justice*. Paper presented at the annual National Reading Conference, Miami, FL.
- Gregory, A. & **Snow-Gerono, J.L.** (2005, December). *Acknowledging alternatives: Examining family constructs in the stories of early childhood*. Study group conducted at annual National Reading Conference, Miami, FL.
- Gregory, A., **Snow-Gerono, J.** & Billetz, N. (2005, November). *Balancing literacy instruction in the prek-primary grades in the norms of NCLB*. Workshop presented at the 45<sup>th</sup> Biennial Convocation, Kappa Delta Pi, Orlando, Florida.
- Snow-Gerono, J.L.** & Gregory, A. (2005, October). *Embracing a federal mandate? Teachers join together to implement program and cultivate learning communities*. Paper presented at the 6<sup>th</sup> Annual Conference on Curriculum and Pedagogy, Miami, Ohio.

Research and Scholarship (continued):

**International/National Conference Presentations (continued)**

**Snow-Gerono, J.L.** & Franklin, C. (2005, October). *Elementary school teachers' perceptions of teaching and curriculum in an environment of increased testing and accountability: Walking the middle of the road*. Paper presented at the 6<sup>th</sup> Annual Conference on Curriculum and Pedagogy, Miami, Ohio.

**Snow-Gerono, J.L.** Cahill-Rawley, M.A., Yates, D., Gregory, A.E. & Rogien, L.R. (2005, April). *A factious analogous analysis of No Child Left Behind through the lens of Harry Potter and The Order of the Phoenix*. NRMERA Distinguished Paper presented at the annual American Educational Research Association, Montreal, Canada.

**Snow-Gerono, J.L.** & Franklin, C.A. (2005, February). *Teaching in an environment of testing: Mentor teachers in a school-university partnership share the influences of high-stakes testing on their teaching and mentoring*. Paper presented at the annual Association of Teacher Educators, Chicago, IL.

**Snow-Gerono, J.L.** (2004, October). *Social justice through literacy: Writing the story of teachers' understandings*. Interactive discussion at the annual Curriculum and Pedagogy conference, Miami, OH.

Slonaker, A., **Snow-Gerono, J.L.**, Slonaker, B., Bullock, P., & Duque, G. (2004, October). *Deliberating differently for social justice: A transparent, public democratic project*. Interactive discussion at the annual Curriculum and Pedagogy conference, Miami, OH.

Dana, N.F., **Snow-Gerono, J.L.** & Nolan, J.F. (2004, April). *Following up with PDS graduates: An emergent theory of teacher leadership*. Paper presented at the annual American Educational Research Association, San Diego, CA.

**Snow-Gerono, J.L.**, Nolan, J.F., Hil Kirk, K., & Badialo, B. (2004, February). *Assessing the impact of Professional Development School partnerships*. Paper presented at the annual American Association for Colleges of Teacher Education, Chicago, IL.

**Snow-Gerono, J.L.** and Slonaker, A. (2003, October). *Balancing public and private purpose: Examining potentially productive tensions within teacher inquiry*. Presentation at the 4<sup>th</sup> Annual Curriculum and Pedagogy Conference, Decatur, GA.

Slonaker, A. and **Snow-Gerono, J.L.** (2003, October). *Finding our discursive selves: Examining positionality and (silent) voices in school-university partnerships*. Presentation at the 4<sup>th</sup> Annual Curriculum and Pedagogy Conference, Decatur, GA.

Research and Scholarship (continued):

**International/National Conference Presentations (continued)**

Ruth, A.E. & **Snow-Gerono, J.L.** (2003, April). *Mentoring in a PDS: Exploring the Simultaneous Development of a Mentor Teacher and her Intern*. Paper Presentation at the American Education Research Association, Chicago, Illinois.

**Snow-Gerono, J.L.** (2003, April). *Professional Development in a Culture of Inquiry: A PDS Partnership and its Impact on Teacher Researchers*. Paper Presentation at the American Education Research Association, Chicago, Illinois.

**Snow-Gerono, J.L.** (2003, April). *A Portrait of an Inquiry Stance: Teachers Researchers' Perceptions of Inquiry and how it Impacts Professional Development*. Paper Presentation at the American Education Research Association, Chicago, Illinois.

**Snow-Gerono, J.L.**, Nolan, J.F., Dana, N.F., Ruth, A.E., McCarty, C., Alekna, M., Fanelli, S., & Jacobs, J. (2003, February). *Developing teacher leaders within a Professional Development School internship: Following up with PDS graduates*. Professional Clinic Presentation at the Association of Teacher Educators 83<sup>rd</sup> Annual Meeting, Jacksonville, Florida.

**Snow-Gerono, J.L.** & Slonaker, A. (2002, October). *Tipping the scales in school-university partnerships: Deconstructing a democratic dialectic*. Interactive Discussion at the 3<sup>rd</sup> Annual Curriculum and Pedagogy Conference, Decatur, GA.

Slonaker, A. & **Snow-Gerono, J.L.** (2002, October). *What are we educating for? Sustaining participatory democratic ideals through literacy as a social practice*. Interactive Discussion at the 3<sup>rd</sup> Annual Curriculum and Pedagogy Conference, Decatur, GA.

Dana, N.F., Abruzzo, S., Gimbert, B.G., Nolan, J., Silva, D.Y., **Snow-Gerono, J.**, Henning, M.B., Zembal-Saul, C. (2002, February). *Developing the teacher education curriculum for Professional Development Schools*. Professional Clinic Presentation at the Association of Teacher Educators 82<sup>nd</sup> Annual Meeting, Denver, Colorado.

Dana, N.F., Nolan, J.F., Abruzzo, S., Bradley, B., Easley, J., Henning, M.B., **Snow-Gerono, J.**, & Zembal-Saul, C., (2002, January). *Research and scholarship in the SCASD-Penn State Elementary PDS partnership*. Roundtable Presentation at The Holmes Partnership Sixth Annual Conference, San Antonio, Texas.

Dana, N.F., Nolan, J.F., Abruzzo, S., Bradley, B., Easley, J., Henning, M.B., **Snow-Gerono, J.**, & Zembal-Saul, C., (2002, January). *Preparing Future Teacher Educators Through Engagement in Collaborative Supervision and Program Development in the Professional Development School*. Paper Presentation at The Holmes Partnership Sixth Annual Conference, San Antonio, Texas.

Research and Scholarship (continued):

**International/National Conference Presentations (continued)**

- Dana, N.F., Nolan, J.F., Abruzzo, S., Bradley, B., Easley, J., Henning, M.B., **Snow-Gerono, J.**, & Zembal-Saul, C., (2002, January). *SCASD - Penn State PDS Partnerships*. Roundtable Presentation at The Holmes Partnership Sixth Annual Conference, San Antonio, Texas.
- Rodriguez, E., Bullock, P., Freedman, D. **Snow-Gerono, J.** (2001, October). *Disrupting to create anew: exploring the possibilities of narratives in the classroom*. Paper Presentation at the Conference on Curriculum and Pedagogy, Victoria, Canada.
- Slonaker, A., **Snow-Gerono, J.**, & Slonaker, B. (2001, October). *Yearbook discourse In/Ex-clusion: Excavating past dirt, identity, and memory*. Interactive Discussion at the Conference on Curriculum and Pedagogy, Victoria, BC, Canada.
- Freedman, D., Duo, P., Antrop-Gonzalez, R., Huang, H., Slonaker, A., & **Snow-Gerono, J.** (2001, October). *Excavating meaning: past dirt, identity, and memory within/on/between yearbook discourses*. Paper Presentation at The Conference on Curriculum Theory and Classroom Practice (the Bergamo Conference), Dayton, Ohio.
- Snow, Jennifer L.** and Silva, Diane Y. (2001, April). *Reconceptualizing Curriculum for the Professional Development School: Methods Faculty Self-Reflections*. Paper Presentation at the American Education Research Association, Seattle, Washington.
- Snow, Jennifer L.**, Freedman, Debra; Rodriguez, Encarna; and Bullock, Patricia. (2000, November). *Narratives as emancipatory practice: The reconceptualizing of a secondary education course*. Paper Presentation at the 1<sup>st</sup> Annual Conference on Curriculum and Pedagogy, Austin, Texas.
- Snow, Jennifer L.**; Rodriguez, Encarna; and Bullock, Patricia. (2000, November). *Ask my paper doll who I am as a teacher...* Paper Presentation at the Arts-based Educational Research Conference, Austin, Texas.
- Snow, Jennifer L.** and Dempsey, Van. (1999, February). *Coordination of Teacher Education at a PDS*. Presentation at the 4th Annual Kansas University PDS Conference, Kansas City, Missouri.

**Regional Conference Presentations**

- Snow-Gerono, J.L.**, Gregory, A., & Rawley, M.A. (2005, October). *No teacher left behind: Teams benefit literacy learning*. Paper presented at the 23<sup>rd</sup> Annual Conference Northern Rocky Mountain Educational Research Association. Jackson Hole, Wyoming.



Research and Scholarship (continued):

**Regional Conference Presentations (continued)**

Franklin, C. & **Snow-Gerono, J.** (2005, October). *Teachers and testing: Mentor teachers share experiences*. Paper presented at the 23<sup>rd</sup> Annual Conference Northern Rocky Mountain Educational Research Association. Jackson Hole, Wyoming.

Gregory, A. & **Snow-Gerono, J.L.** (2005, October). *Embracing alternatives in the Stories of Early Childhood*. Paper presented at the 23<sup>rd</sup> Annual Conference Northern Rocky Mountain Educational Research Association. Jackson Hole, Wyoming.

**Snow-Gerono, J.L.**, Cahill-Rawley, M.A., Yates, D., Gregory, A.E. & Rogien, L.R. (2004, October). *A factious analogous analysis of No Child Left Behind through the lens of Harry Potter and The Order of the Phoenix*. Paper presented at the annual Northern Rocky Mountain Educational Research Association, Custer, SD.

Gregory, A.E. & **Snow-Gerono, J.L.** (2004, October). *Literacy and social justice: Teachers' inquiry for transformative practice*. Paper presented at the annual Northern Rocky Mountain Educational Research Association, Custer, SD.

**Snow-Gerono, J.L.** & Ruth, A.E. (2002, October). *Exploring the journey of a PDS intern graduate into a PDS mentor teacher*. Paper Presentation at the 31<sup>st</sup> annual meeting of The Pennsylvania Association of College and Teacher Educators, Hershey, PA.

**Snow-Gerono, J.L.**, Dana, N.F., Nolan, J.F., Ruth, A.E., McCarty, C., Thulin, J., Amond, M. & Alekna, M. (2002, October). *The cultivation of teacher leaders in a Professional Development School context*. Workshop presented at the 31<sup>st</sup> annual meeting of The Pennsylvania Association of College and Teacher Educators, Hershey, PA.

**Local Conference Presentations**

**Snow, Jennifer L.** (1995, June). *Public Relations in a PDS*. Workshop for PDS teachers in a partnership with the Benedum Collaborative.

**Discussant/Chair for Conference Sessions**

**Snow, J.L.** (2015, April). *Teacher Leadership*. Annual American Educational Research Association, Chicago, IL.

**Snow, J.L.** (2010, April/May). *Teaching in an Urban Context: Thoughts, Reflections, and Challenges*. Chair. American Educational Research Association, Denver, CO.

**Snow, J.L.** (2010, April/May). *Professional Development in Social Justice Education*. Chair. American Educational Research Association, Denver, CO.

**Research and Scholarship (continued):**

**Discussant/Chair for Conference Sessions (continued)**

**Snow, J.L.** (2010, April/May) *Exploring Discipline-Based Issues in Preservice Teacher Education*. Chair. American Educational Research Association, Denver, CO.

**Snow-Gerono, J.L.** (2008, March). *Early career to veteran teachers' professional development learning experiences*. Discussant (four papers). American Educational Research Association, New York, NY.

**Snow-Gerono, J.L.** (2008, March). *Learning from others: Mentoring and supervision*. (Chair). American Educational Research Association, New York, NY.

**Snow-Gerono, J.L.** (2006, April). *Bridging pre-service teachers' educational experiences through mentoring & practice in the classroom*. Discussant (four papers). American Educational Research Association, San Francisco, CA.

**Snow-Gerono, J.L.** (2006, April). *Teacher research and teacher learning through professional development*. (Chair). American Educational Research Association, San Francisco, CA.

**Snow-Gerono, J.L.** (2005, April). *Technological Innovations in Teacher Preparation and Teacher Development*. Discussant (four papers). American Educational Research Association, Montreal, Canada.

**Snow-Gerono, J.L.** (2005, February). *Research in Preservice Teacher Education*. (Invited Discussant for double session.) Association of Teacher Educators, Chicago, Illinois.

**Snow-Gerono, J.L.** (2003, April). *Supervision as a Moral Endeavor*. (Invited Discussant on Panel for "Stephen Gordon's Perspective on Supervision as a Moral Endeavor.") American Educational Research Association, Chicago, Illinois.

**General Professional:**

**2013-Present.** *State Leadership Team Member*. Smarter Balanced Digital Library.

**2011-Present.** *Co-facilitator*, Idaho IHE Coalition.

**2010.** *Member*, University of Phoenix State Focused Review Team.

**2010.** *Participant*, Professional Standards Commission, Elementary Standards Review.

**2009-2010.** *Facilitator*, AERA Division B (Curriculum Studies) New Faculty Development Seminar.

**2009-Present.** *Participant*, Association of Teacher Education, Research Committee.

**2007 – 2011.** *Council Member*. Curriculum and Pedagogy Group (Membership Committee Chair; Program Committee Chair).

**2009.** *Facilitator*, Center for Teaching and Learning, Action Research Workshop.

**2006-2007.** *Member*, NNU State Review Team, NCATE.

**2005-2007.** *Participant*, Boise State Shared Leadership.

**2003– 2006.** *Inservice* – Presented inservices to Boise School District Special Education Paraprofessionals on Student Management (each semester).

**2006.** *Participant*, Boise State H3 Project Redesign Seminar.

**2004, April.** *Participant* – AERA Division K (Teacher Education) New Faculty Development Seminar.

**2002-2004.** *Book Editor*—Work with Dr. J. Daniel Marshall at Penn State University on the revisions for second edition of book, *Turning Points in Curriculum: A Contemporary American Memoir*.

**2003.** *Inservice* – Presented inservice with Dr. Nancy Dana on teacher inquiry for the Tyrone Area School District in Pennsylvania for secondary teachers and administration in line with their decision to focus on teacher research for self-directed supervision.

Service:

**International/National**

**2013 - Present.** *Editorial Board Member.* Journal of Teacher Education.

**2009-Present.** *Member.* Research Committee, Association of Teacher Educators.

**2008-Present.** *Member.* Dissertation Award Committee, Association of Teacher Educators.

**2009-2012.** *Co-Chair.* Program Committee, C&P Council.

**2007-Present.** *Member.* Council Curriculum and Pedagogy Group.

**2007-Present.** *Manuscript Reviewer.* Curriculum and Pedagogy Conference Proceedings.

**2007-Present.** *Book Reviewer.* SAGE Publications, Classroom management texts.

**2007-Present.** *Member.* Finance Committee, Curriculum and Pedagogy Group.

**2006 – Present.** *Manuscript Reviewer.* Journal of Curriculum and Pedagogy.

**2006 – Present.** *Manuscript Reviewer.* Journal of Teacher Education.

**2006-Present.** *Manuscript Reviewer.* Teaching and Teacher Education.

**2002-Present.** *Manuscript Reviewer,* Action in Teacher Education.

**2006-2010.** *Member,* Communications Committee, Curriculum and Pedagogy Group.

**2005-Present.** *Manuscript Reviewer.* Journal of School Leadership.

**2007-2009.** *Member.* Dissertation Award Committee, Curriculum and Pedagogy Group.

**2003-2009.** *Chair,* Membership Committee, Curriculum and Pedagogy Group.

**2006.** *Book Reviewer.* Pearson Education, Curriculum texts.

**2002.** *Manuscript Reviewer,* Teaching Education.

**2003.** *Book Reviewer,* Allyn & Bacon, Classroom Management texts.

**State**

**2011-Present.** *Co-facilitator.* IHE Coalition – Idaho.

**2010.** *Participant,* Idaho Elementary Education Teacher Professional Standards Revision.

**2010.** *Reviewer,* Idaho State Department of Education Review of University of Phoenix.

**2006.** *Reviewer,* NCATE/Idaho State Department of Education Review of NNU teacher education programs – elementary education, master’s level reading degrees.

**2002.** *Participant,* Professional Standards Commission Review of Rubrics and Standards for Elementary Teacher Certification.

Service:

**University**

**2013-2014.** COE Dean Search Committee.  
**2012-Present.** *Faculty Senate.*  
**2012.** *Interdisciplinary Mentor.*  
**2011-Present.** Naming Committee.  
**2011-Present.** Honorary Doctorate Committee.  
**2012-Present.** Faculty Financial Affairs – Senate Liaison.  
**2012-Present.** *Senate Liaison.* Faculty Financial Affairs Committee.  
**2009-Present.** *Virtual Teaching and Learning with Technology Roundtable*  
**2007-Present.** *Undergraduate Research Committee.*  
**2008-Present.** *Honorary Doctorate Committee*  
**2006 – 2009.** *Faculty Senator,* Boise State University Faculty Senate.  
**2004-2008** *Member,* Diversity Requirement Committee, Boise State University.  
**2003-2005.** *Member,* Student Affairs Committee, Boise State University.  
**2002 – 2003.** *Member,* Faculty Council Faculty/Staff/Student Awards Committee, The Pennsylvania State University.  
**2002.** *Participant,* PDS Digital Video Production Team, The Pennsylvania State University.

**College**

**2010-Present.** Clinical Field Experience Sub-committee, TECC.  
**2010-Present.** Teacher Education Shared Leadership Team  
**2008-Present.** Leadership Team(s), College of Education.  
**2008-Present.** Teacher Education Coordinating Council.  
**2009-Present.** Teacher Education Assessment Work Group.  
**2004-Present.** *Counselor,* Kappa Delta Pi, Installation of Chapter at Boise State University.  
**2003-2011.** *Co-Advisor,* Teacher Education Association, Boise State University.  
**2009.** NCATE Rejoinder Task Force.  
**2006.** *Member.* Bilingual Education Search Committee.  
**2005 – 2008** *Member,* Curriculum Committee.  
**2004 - 2008.** *Member,* Doctoral Curriculum Committee.  
**2004-2006.** *Member,* Field Guide Revisions.  
**2004-2005.** *Member,* Literacy Search Committee.

**CIFS Department**

**2013.** *Member.* Search Committee.(s)  
**2009-Present.** *Facilitator.* Elementary Education Task Force.  
**2008-2012.** *Department Chair.*  
**2006 - Present.** *Chair.* Policy Committee.  
**2005 – Present.** *Member.* Curriculum Committee.  
**2003-Present.** *Member,* Educational Leadership Task Force and Search Committee.  
**2006 – 2007.** *Member.* Search Committees.  
**2003-2005.** *Member,* Promotion and Tenure Committee.

**2003 – 2004.** *Member*, Post-Baccalaureate Certification Program Committee, CIFS Department Committee.

**2003 – 2004.** *Member*, Elementary Education Program Redesign, CIFS Department.

**Doctoral Committees:**

Brad Coats (**Chair**, 2017)

Paul Sebastian (**Chair**, 2017)

Tana Jons (**Co-Chair**, 2017)

Leisl Milan (2016)

Jamie Sand (**Chair** 2016)

Bevin Etheridge (**Co-Chair**, Graduated December 2015)

Darcie Rae (**Co-Chair**, Graduated May 2015)

Jacob Skousen (Graduated May 2015)

Jennifer Gardner (Graduated May 2015)

Brady Webb (Graduated May 2015)

Ezra Gwilliams (**Co-Chair**, Graduated Fall 2013)

A.J. Zenkert (Graduated Fall 2013)

Kelley Moneymaker (Graduated Fall 2013)

Christina Ramirez-Nava (Graduated Fall 2013)

Pamela Briggs (**Chair**, Graduated, Summer 2012)

Josh Pfiester (Graduated, Summer 2012)

Jane McKeivitt (**Co-Chair**, Graduated, Spring 2012)

Chris Haskell (**Chair**, Graduated, Spring 2012)

Bevin Etheridge (**Co-Chair**, Comps Spring 12)

Faith Beyer Hansen (Graduated, December 2011)

Eun Kyoung Yu (Graduated, August 2011)

Darlene Hartman-Hallam – (Graduated, May 2011)

Donnie Hale – (Graduated, May 2011)

Pam Gehrke (defended proposal, Spring 2011)

Greg Hoetker - Graduated, May 2010

Darcy Jack - graduated, May 2010

Jane Walther – graduated, December 2009

Julia Zarbnisky – graduated, December 2009

Brian Whitney – graduated May 2009

Linda Kirby - graduated December 2008

Mary Ann Cahill – graduated, May 2007

Jo Anne Lafferty – graduated, December 2005

Ruth Calnon – graduated, December 2005

Debra Yates – graduated December, 2005 (**Co-chaired dissertation**)

Celia King – (completed Comps, 2006)

Lisa Kinnaman (completed Comps, Spring 2008)

**Master's Committees:**

Christine Change Gillespie (December 2013)  
Nate Dean (December 2015)  
Pam Davis (July 2004)  
Catherine Hazah (December 2004)  
Christina Reggear (Thesis Defense, May 2005)  
Nichole Billetz Moos (Undergraduate Honors Thesis, May 2005)  
Jaime Campbell (July 2005)  
Anabel Ortiz-Chavolla (October 2005)  
Jason Draney (March 2006)  
Dave Michael (March 2006)  
Sheila Scott (March 2006)  
Susan Hawke (July 2006)  
Brooke Claridge (July 2006)  
William Richard McClain (Chair, October 2006)  
Jennifer McClain (October 2006)  
Natalie Aurich (October 2006)  
Roanna Barclay (October 2006)  
Kimberly Hale (October 2006)  
Phil Hiller (October 2006)  
Johnna Anderson (Thesis defense, December 2006)  
Annetta Brooks (March 2007)  
Lindsey Truxel (Chair, March 2007)  
Rebecca Franks (March 2007)  
Kandy Stanford (March 2007)  
Julie Matsushita (July 2007)  
Leah Rencher (Chair, July 2007)  
Danielle Stoddard (July 2007)  
Marvin Schroeder (July 2007)  
Gilberto Lara (July 2007)  
Jaime Sand (October 2007)  
Janine Balfour (October 2007)  
Jared Hulme (December 2008)  
Andrea Baerwald (July 2008)  
Michelle Devine (May 2009)  
LaRona Ezell (May 2009)  
Linda Osgood (July 2009)  
Gabriel Horn (Thesis defense, August 2009)  
Camille Hammond (October 2009)  
Troy Nickel (October 2009)  
Julie Read (March 2010)  
Jennifer Fish (July, 2010)  
Heather Larsen (December, 2011)  
Margaret Lisa Link (May, 2011)  
Ghada Almarwazi (Thesis May 2013)

**Professional Associations:**

American Education Research Association, American Association of Colleges of Teacher Education, Curriculum and Pedagogy Group (Council Member 2007 – 2011), Association of Teacher Educators, and Curriculum Workers Society (Founding member, The Pennsylvania State University).

**Awards and Recognitions:**

Boise State University Faculty Research Associate (2007 – 2008), Phi Delta Kappa Andrew V. Kozak Fellowship (2003), Association of Teacher Educator's Distinguished Program in Teacher Education (SCASD-Penn State Elementary PDS Partnership) (2002), Penn State Graduate Student Recognition Award for Outstanding Scholarship, Research, Dedication to Education and the Promise of Professional Excellence (2001), Eva Diefenderfer Graduate Fellowship (2000-2001), and Who's Who Among America's Teacher (1997-1999).

## CURRICULUM VITAE

University of Idaho

**NAME:** Taylor Raney

**DATE:** July 20, 2021

**RANK OR TITLE:** Director of Teacher Education, Associate Department Chair, Associate Professor of Curriculum and Instruction

**DEPARTMENT:** Curriculum and Instruction

**OFFICE LOCATION AND CAMPUS ZIP:**

Education Building 507  
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**OFFICE PHONE:** (208) 885-1027

**FAX:** (208) 885-6761

**EMAIL:** tcraney@uidaho.edu

**WEB:** www.uidaho.edu/ed/ci/taylorraney

**DATE OF FIRST EMPLOYMENT AT UI:** June 21, 2015

**DATE OF PRESENT RANK OR TITLE:** June 21, 2015

**EDUCATION BEYOND HIGH SCHOOL:**

**Degrees:**

Ph.D. (2015) Northwest Nazarene University, Educational Leadership

Ed.S. (2013) Northwest Nazarene University, Educational Administration

M.Ed. (2012) Northwest Nazarene University, Curriculum and Instruction

M.Ed. (2006) Northwest Nazarene University, Educational Administration

B.S.Ed. (2002) University of Idaho, Secondary Education

**Certificates and Licenses:**

Idaho Standard Secondary Credential: English 6/12, French K/12, Humanities 6/12, Psychology 6/12

Idaho Standard Administrator: School Principal Pre-K/12, Superintendent

**EXPERIENCE:**

**Teaching Appointments:**

2015–Present Clinical Associate Professor, Department of Curriculum and Instruction, University of Idaho, Moscow, ID

2003–2008 Secondary Teacher, West Junior & Boise Senior High Schools, Boise School District, Boise, ID

**Academic Administrative Appointments:**

2018–Present Associate Chair, Department of Curriculum and Instruction, College of Education, Health and Human Sciences, University of Idaho, Moscow, ID

2015–Present Director of Teacher Education, College of Education, Health and Human Sciences, University of Idaho, Moscow, ID

2015–2020 Elementary Program Coordinator, College of Education, Health and Human Sciences, Department of Curriculum and Instruction, University of Idaho, Moscow, ID

2015–2020 Secondary Program Coordinator, College of Education, Health and Human Sciences, Department of Curriculum and Instruction, University of Idaho, Moscow, ID

2020–present Core Program Coordinator, College of Education, Health and Human Sciences, Department of Curriculum and Instruction, University of Idaho, Moscow, ID

2013–2015 Director of Teacher Certification, Idaho State Department of Education, Boise, ID

Taylor C. Raney

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2013-2015 Director of Professional Standards, Idaho State Department of Education, Boise, ID  
2008-2013 Elementary School Principal, Caldwell School District, Caldwell

**TEACHING ACCOMPLISHMENTS:**

**Areas of Specialization:**

Curriculum and Instruction  
Educational Leadership

**Courses Taught:**

ED 250, College of Education, Health and Human Sciences Ambassadors: Spring 2019, Fall 2019, Spring 2020, Fall 2020, Spring 2021, Fall 2021  
ED 602, Literature Review, Fall 2021  
EDCI 201, Contexts of Education: Fall 2017, Fall 2018  
EDCI 301, Learning, Development, and Assessment: Fall 2015, Fall 2016  
EDCI 401, Internship Seminar: Fall 2019 (f2f sec. 01, online sec. 02, and virtual sec. 03), Fall 2020, Fall 2021  
EDCI 402, Practicum: Elementary Methods, Fall 2021  
EDCI 404, Special Topics, World Languages Teaching Methods, Spring 2021  
EDCI 408, Integrated Methods Practicum 1: Fall 2020, Spring 2021, Fall 2021  
EDCI 409, Integrated Methods Practicum II: Spring 2019  
EDCI 437, Secondary Foreign Language Methods: Fall 2019  
EDCI 447, Secondary Foreign Language Methods Practicum: Fall 2019  
EDCI 499, DS Secondary Foreign Language Methods, Fall 2021  
EDCI 501, Internship Seminar: Fall 2019 (online)  
EDCI 598, Intern: Secondary Teaching, Fall 2019, Spring 2020, Fall 2020, Spring 2021, Fall 2021  
EDCI 599, Non-thesis Master's Research: Spring 2018, Summer 2018, Spring 2021  
EDCI 600, Doctoral Research and Dissertation: Summer 2021  
EDAD 534, The Principalsip: Summer 2016  
EDAD 595, Administration and Supervision of Personnel: Summer 2016, Summer 2017, Summer 2020, Summer 2021  
ISEM 301, Alcohol and Drug Prevention: Spring 2016, Fall 2016, Spring 2017, Fall 2017, Spring 2019

**SCHOLARSHIP ACCOMPLISHMENTS:**

**Refereed/Adjudicated**

*Scholarship of Application*

**Raney, T.**, Dousay, T., Jensen, J. (2021). University of Idaho CAEP Rejoinder. University of Idaho. Moscow, ID.

**Raney, T.**, Dousay, T., Jensen, J. (2020, October). University of Idaho State Accreditation Report. University of Idaho. Moscow, ID.

**Raney, T.**, Dousay, T., Jensen, J. Hollingshead, A. (2020, April). University of Idaho CAEP Self-Study Report Addendum. University of Idaho. Moscow, ID.

**Raney, T.**, Dousay, T., Campbell, D., Jensen, J. Carr-Chellman, A., Hollingshead, A. (2019, July). University of Idaho CAEP Self-Study Report. University of Idaho. Moscow, ID.

*Scholarship in Discovery*

Scheef, A. R., Hollingshead, A., **Raney, T.**, Malone, K., Goebel, E., & Hayes, J. (In Review). School personnel perceptions of video conference IEP meetings. *Journal of Special Education Technology*.

Carr, A.A., **Raney, T.**, Campbell, D. (2020, November). Gem state inequalities: Examining the recent history of Idaho public school funding through Kozol's Lens. *Journal of Education Finance*.

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Carr, A.A., **Raney, T.**, Campbell, D. (2019, September). Rural funding inequities: The case of Idaho's public schools. *Kappan Online*. ([LINK](#))

**Technical/Professional Reports:**

- Raney, T.** (2015, May). Mathematics teacher certification in Idaho. Idaho Math Education Collaborative. Boise, ID.
- Raney, T.** (2015, January). Idaho tiered teacher licensure: Anticipated outcomes. Boise State University.
- Raney, T.** (2014, December). Issues in teacher certification. Teacher Education Coordinating Committee. University of Idaho
- Raney, T.** (2014, November). Tiered teacher licensure: What can the new teacher expect? Northwest Nazarene University.
- Raney, T.** (2014, October). Tiered licensure: Expected outcomes and ramifications. Lewis-Clark State College.
- Raney, T.**, Clark, L., Kellerer, P., Gramer, R. (2014, August). Idaho Board of Education vision for tiered teacher licensure in Idaho. Idaho School Superintendents' Annual Conference. Boise, ID.
- Raney, T.** (2014, July). Tiered teacher licensure: Other states' requirements and outcomes. Idaho State Board of Education.
- Raney, T.** (2014, April). Educator ethics: What school administration and leadership should know and do to support student safety. University of Idaho – Boise.

**Accepted Refereed Presentations at International, National, Regional, State, and Local Conferences:**

- Dousay, T., Darragh, J., **Raney, T.** (2021, June) Ready Preservice Teacher One: Creative solutions to virtual practicum experiences. P20 Conference: Learning by Doing, Twin Falls, ID.
- Darragh, J., **Raney, T.** (2020, April). Text-a-Teacher: Exploring Virtual Mentoring with First-Year Teachers. American Educational Research Association Annual Conference, San Francisco, CA. (Conference canceled)
- Raney, T.** (2019, March). Active Learning in Static Classrooms. Active Learning Symposium. Center for Excellence in Teaching and Learning, Moscow, ID.
- Rickey, D., **Raney, T.**, Pietryka, D., & DeGuire, D. (2019, January). Program Accreditation and Micro-Credentialing: Guided Discussions. Ted Andrews Winter Symposium, National Association of State Directors of Teacher Education and Certification, San Diego, CA.
- Raney, T.**, Sanchez, L., Lord, J., Neill, M., Snow, J., & Colon, L. (2018, June). The power of collaboration in the Idaho Coalition for Educator Preparation. National Association of State Directors of Teacher Education and Certification Conference, Minneapolis, MN.
- Raney, T.**, Snow, J., Sanchez, L., Kellerer, P., & VanMulle, H. (2017, February). EPP collaboration for continuous improvement across programs. American Association of Colleges of Teacher Education Annual Conference, Tampa, FL.
- Raney, T.** (2017, November). Idaho core standards and preparing teachers for a diverse world. University of Idaho Tribal Summit; Education: University and Tribal Partnerships, Moscow, ID.
- Raney, T.**, Snow, J., Sanchez, L., & Linder, C. (2015, November). Elevating the profession: Toward a continuum of professional learning. Idaho School Boards Association Annual Convention, Coeur d'Alene, ID.
- Raney, T.**, Sanchez, L., & Kellerer, P. (2015, October). Impact on reading fluency of double-dosed tier-one instruction for struggling kindergarten students. Northern Rocky Mountain Educational Research Association Conference, Boise, ID.
- Raney, T.** (2015, March). Educator ethics in a digital world. Idaho State Prevention Conference in Sun Valley, ID.

- Raney, T. & Haas, S.** (2014, August). Trends in educator ethics in Idaho. Idaho Association of School Administrators Summer Leadership Conference in Boise, ID.
- Losee, L., Wallace, J., **Raney, T.**, & Barzee, S. (2014, May). NTEP: Mapping our state's progress to transform educator preparation. 4<sup>th</sup> National Summit on Educator Effectiveness in San Antonio, TX. Kennedy, T., Sharrard, J., Serna, I., Johnston, H., Kennedy, T., **Raney, T.**, & Hammond, K. (2002, October). FLES K-6: Improving public awareness and support of elementary foreign language education programs. Idaho Association of Teachers of Language and Culture Annual Conference in Boise, ID.

#### **Panels**

Panel Moderator. (June 2021). Idaho Indian Education Summit, University of Idaho, Moscow, ID

#### **Grants Awarded**

- Additional Investigator, *Vandal Experience Conference for High School Counselors*. (Principal Investigator: Erick Larson) Funded by the University of Idaho Vandal Ideas Project. 2021. \$15,000.
- Senior Personnel. *Indigenous Knowledge for Effective Education Program (IKEEP)*. (Principal Investigator: V. Anthony-Stevens). Funded by the U.S. Department of Education. 2018-2023. Award Notification # S299B180040. \$998,704.
- Principal Investigator. *Network for Transforming Educator Preparation*. Funded by the Council of Chief State School Officers. 2013-2015. \$240,000.

#### **SERVICE:**

##### **Committee Assignments:**

###### *University Level, Campus-wide*

- Chair, Teacher Education Coordinating Committee, 2015-present
- Member, University Curriculum Committee, 2016-2019
- Chair, University Curriculum Committee, AY 2018-19
- Stand-in Member (for colleague sabbatical), University Curriculum Committee, Spring 2022
- Member, Academic Strategic Steering Committee, 2018-present
- Administrator Alternate, Dismissal Hearings Committee, 2018-2021
- Faculty, Dismissal Hearings Committee, 2021-present
- General Education Steering Committee, 2020-present
- Member, President's Council on Diversity and Inclusion, 2020-present

###### *College Level, Education, Health and Human Sciences*

- Member, Leadership Team, 2015-present
- Member, Search Committee, Dean, 2015-16
- Chair, Search Committee, Director of Student Services, 2015-16
- Chair, Teacher Education Academic Appeals Committee, 2015-present
- Co-Chair, ad hoc faculty promotion bylaw committee, 2017
- Member, College Coordinating Committee, 2015-present
- Member, Promotion and Tenure Committee, 2018-2019
- Member, Teacher Career Fair Steering Committee, 2015-present
- Member, Search Committee, Student Services Support Staff, 2018
- Member, Search Committee, Student Services Coordinator, AY 2018-19
- Member, Clinical Faculty Promotion Committee, AY 2018-20
- Member, Search Committee, Student Services Coordinator, Fall 2021
- Member, Search Committee, Administrative Assistant, AY 2021-22
- Chair, Search Committee, Assessment and Accreditation Coordinator, Fall 2021

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Departmental Level

*Agriculture and Extension Education (College of Agriculture and Life Sciences)*

Member, Search Committee, Tenure Track Early Childhood Faculty, AY 2018-19

Member, Third Year Review Committee, Faculty Member, Agriculture Education, Spring 2019

*Art & Design (College of Art and Architecture)*

Member, Search Committee, Clinical Faculty Member, Art Education, AY 2018-19

Member, Third Year Review Committee, Clinical Faculty Member, Art Education, Spring 2022

*Curriculum and Instruction (College of Education, Health and Human Sciences)*

Member, Third Year Review Committee, Clinical Faculty Member, Spring 2016

Member, Search Committee, Tenure Track Special Education Faculty, 2016

Chair, Core and Elementary/Secondary Program Revision ad hoc Committee, 2015-2017

Member, IKEEP Advisory Board, 2016-present

Member, (Specific Faculty Member) Promotion Committee, Fall 2018

Member, Search Committee, Clinical Faculty Member, Elementary Teacher Education, 2020

Member, Search Committee, Tenure Track Faculty Member, Literacy Teacher Education, Spring 2021

*Leadership and Counseling (College of Education, Health and Human Sciences)*

Member, Search Committee, Clinical Faculty Member, Educational Leadership, Spring 2021

*Lionel Hampton School of Music (College of Letters, Arts, and Social Sciences)*

Ex Officio Member, Educational Leadership Accreditation Committee, Summer 2019-present

Member, (Specific Faculty Member) Clinical Faculty Third Year Review Committee, Fall 2019

*Movement Sciences (College of Education, Health and Human Sciences)*

Member, (Specific Faculty Member) Clinical Faculty Promotion Committee, Fall 2019

Member, Search Committee, Tenure Track Faculty Member, Physical Education, Spring 2021

**Professional and Scholarly Organizations:**

National Association of State Directors of Teacher Education and Certification, 2013-2018

Idaho Association of School Administrators, 2008-2019

Idaho School Superintendents' Association, 2013-2019

Phi Delta Kappa International, 2019-present

**Intramural Service:**

Faculty Advisor, Student National Education Association, 2020-present

Media Outreach Faculty Expert, Education Issues, University of Idaho, 2016-present

Faculty Advisor, Pi Kappa Alpha fraternity, University of Idaho, 2019-present

Faculty Advisor, Men's Lacrosse Club, University of Idaho, 2020-present

**Outreach Service:**

Council for the Accreditation of Educator Preparation Reviewer, 2016-present

National Association of State Directors of Teacher Education and Certification Professional Development Committee, 2016 – 2019

Professional Evaluation Review Committee (Idaho Department of Education), 2015

Idaho Coalition for Educator Preparation, 2013-present

Chair, 2016-2018

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Idaho Association of Colleges of Teacher Education, 2013-present  
-President, Fall 2020-present  
Regions I and II Idaho School Superintendents' Association University of Idaho Liaison, 2015-present  
Idaho Rural Schools Collaborative, 2015-present  
Idaho Professional Standards Commission, Elementary Principal Representative, 2011-2013  
Idaho Professional Standards Commission, Higher Education Representative, 2016-2019  
Inclusive Education Task Force, Idaho Council on Developmental Disabilities, 2014-2017  
Elementary Standards Review, Professional Standards Commission, January 2015  
Core Standards Review, Professional Standards Commission, November 2016  
CAEP Accreditation Team, Midwestern State University, 2017 – 2018  
Member, Search Committee, Moscow School District, Moscow Middle School Principal, Spring 2017  
Equitable Access to Excellent Educators, Idaho State Department of Education, 2019-present  
Member, Curriculum Selection Committee, Idaho State Department of Education, 2018-present  
Member, State Accreditation Review Team, Teach for America, Idaho, Fall 2019  
Teaching, Learning, and Assessment Committee, Moscow School District, Idaho, Summer 2020-present  
CAEP Accreditation Team, University of Portland, 2019 – 2020  
CAEP Accreditation Team, Universidad Ana Ge Mendez-Recinto de Carolina, Puerto Rico, 2021  
Idaho Indian Education Committee, 2021-present

**Graduate Committees:**

*Northwest Nazarene University – Doctor of Philosophy*

Harris, Dana  
Hicks, Serena  
Keller, Sheree  
McMillan, Kendra  
McPherson, Peter  
O'Day, Mollee  
Ziegler, Scott

*University of Idaho – Doctor of Philosophy*

Natividad de Conley, Gloria (chair)

**Community Service:**

Board of Directors: Family Advocates of Idaho, 2013-2015  
Editorial Board: Idaho Press Tribune, 2012  
Historical Preservation Commission of Moscow, 2016-2017

**Honors, Awards, Recognitions:**

Alumni Award for Excellence Inspirational Mentor, University of Idaho, 2020  
Accomplished Under 40, Idaho Business Review, 2014

**Non-credit Classes, Workshops, Seminars, Invited Lectures, etc.:**

Guest lecturer: MUST 382: "Music Teaching and Administration." Moscow, ID, 30 January 2020.  
Guest lecturer: EDCI 401: "Internship Seminar" each semester 2017-present

**PROFESSIONAL DEVELOPMENT:**

**Scholarship:**

2018, April: *American Educational Research Association*, New York, NY.  
2018, March: *American Association of Colleges of Teacher Education Conference*, Baltimore, MD.

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2015, October. *Northern Rocky Mountain Educational Research Association Conference*. Boise, ID.

**Advising:**

2015, September. *University of Idaho 12<sup>th</sup> Annual Advising Symposium*. Moscow, ID.

**Administration/Management:**

2019, March: *Council for the Accreditation of Educator Preparation Spring Conference*, Denver, CO.

2019, January: *National Association of State Directors of Teacher Education and Certification Winter Symposium*, San Diego, CA.

2018, July: *American Council on Education Leadership Academy*, Alexandria, VA.

2018, January: *Ted Andrews NASDTEC Winter Symposium*, San Diego, CA.

2017, September: *Council for the Accreditation of Educator Preparation Fall Conf.*, Washington, D.C.

2017, June: *Annual Convention: National Association of State Directors of Teacher Education and Certification*. New Orleans, LA.

2017, March: *American Association of Colleges of Teacher Education Conference*, Tampa, FL.

2017, January: *Ted Andrews NASDTEC Winter Symposium*, San Diego, CA.

2016, October: *Council for the Accreditation of Educator Preparation Fall Conference*, Washington, D.C.

2016, June: *Annual Convention, National Association of State Directors of Teacher Education and Certification*. Philadelphia, PA.

2016, February: *Ted Andrews NASDTEC Winter Symposium*. San Diego, CA.

2015, November: *Idaho School Boards Association Annual Convention*. Coeur d'Alene, ID.

2015, June: *Annual Convention, National Association of State Directors of Teacher Education and Certification*. Atlanta, GA.

2015, May: *State Consortium on Educator Effectiveness*. Atlanta, GA.

2015, April: *Network for Transforming Educator Preparation*. Durham, NC.

2015, February: *Ted Andrews NASDTEC Winter Symposium*. San Diego, CA.

2014, June: *Network for Transforming Educator Preparation*. San Francisco, CA.

2014, June: *Annual Convention, National Association of State Directors of Teacher Education and Certification*. Kansas City, MO.

2014, May: *State Consortium on Educator Effectiveness*. San Antonio, TX.

2014, April: *Developing Student Learning Objectives Summit*, National Education Association. Minneapolis, MN.

2014, February: *Ted Andrews NASDTEC Winter Symposium*. San Diego, CA.

2014, January: *Network for Transforming Educator Preparation*. Atlanta, GA.

Lance K. Harrison

| lance.harrison@psd201.org |

- EDUCATION:**
- Doctor of Philosophy (PhD), Educational Leadership**  
Northwest Nazarene University, Nampa, ID, May 2019  
•Dissertation: Ethics in Education - Educator Misconduct in Idaho
  - Education Specialist (EdS), Educational Leadership: Superintendent**  
Northwest Nazarene University, Nampa, ID, May 2016 Dean's List
  - Master of Science (MS), Educational Administration: Principalship**  
Idaho State University, Pocatello, ID, August 2000 GPA 4.0
  - Bachelor of Science (BS), Major: Elementary Education, Teaching Certificate**  
Brigham Young University, Provo, UT, April 1994 Graduate Cum Laude
- EMPLOYMENT:**
- Preston Idaho School District #201 (1999-Present)**
    - ◆ Superintendent of Schools
    - ◆ District Elementary Director
    - ◆ Director of Special Education
    - ◆ Literacy Coordinator
    - ◆ Junior High Principal
    - ◆ High School Assistant Principal
    - ◆ Elementary Principal
    - ◆ First Grade Teacher
  - Western Governor's University (WGU) (2018-Present)**
    - ◆ Clinical Supervisor – observe, evaluate, and support teacher candidates
  - Utah State University (USU) (2015-2017)**
    - ◆ Testing Proctor – administer and monitor remote assessments taken by university students to ensure accountability and integrity of the process
  - Grace Idaho School District (1994-1999)**
    - ◆ Teacher – Grades 2, 3, 5, 7, and 8
    - ◆ Coach: HS Track & XC/JH Basketball
  - Church Educational System (1993-1994)**
    - ◆ 9<sup>th</sup> Grade Seminary Teacher, Spanish Fork Utah Intermediate School
- LEADERSHIP:**
- ◆ BYU Alumni Association Affiliate, Cache Valley Utah/Idaho Chapter (2007-2009)
  - ◆ President IAESP, Region V (2007-2008)
  - ◆ President Phi Delta Kappa (PDK), Utah State University Chapter (2006)
- TRAINING:**
- ◆ Network of Innovative School Leaders NISL (three-year participant)
  - ◆ Principal Academy of Leadership PALS Professional Development
  - ◆ Project Leadership PL Graduate (3-year training from State Department of Education)
  - ◆ Teacher Observation and Evaluation Danielson Framework Courses
  - ◆ Idaho School Law Conference (multiple-year attendee)
- SERVICE:**
- ◆ Idaho Professional Standards Commission Member (2022-2023)
  - ◆ Classroom Behavior Trainer - Teachers in Ethiopia, Africa (2018)
  - ◆ Educational Exchange Coordinator for Educators from Mongolia (2014-2015)
  - ◆ Humanitarian Work in Orphanages and Schools in Vietnam (2010 & 2012)
  - ◆ Franklin County Fair Board Member (2001-2008)
  - ◆ Special Olympics Volunteer
  - ◆ Idaho Comprehensive Literacy Course Instructor
  - ◆ Church Mission: Two Year Volunteer - Detroit, Michigan
  - ◆ Church Callings: Youth Advisor / Scout Master / Instructor / Young Men Leader  
Finance and Membership Clerk / Bishopric Counselor
- AWARDS:**
- ◆ National Emerging Leader – Selected by PDK as 1 of 13 U.S. Recipients (2007-2008)

INTERESTS:    ♦ Spending time with family    ♦ Learning new things    ♦ Traveling home and  
abroad



**RAMONA LEE**

[REDACTED] | lee.ramona@westada.org

**EDUCATION**

**B.S. Ed. Secondary Education and Special Education**

University of Idaho, Moscow, Idaho

1991

*Teaching Endorsements: Mathematics 6/12, French 6/12, Special Education Generalist K/12*

**M.Ed. Special Education**

University of Idaho, Moscow, Idaho

1999

*Emphasis in Low-Incidence Handicaps*

Additional subsequent specialized coursework

- University of Idaho: **Special Education Administration.** Maintain current endorsement as Director of Special Education.
- Stephen F. Austin University, Nacogdoches, Texas: **Vision Impairments**
- Northwest Nazarene University, Nampa, Idaho: **Gifted and Talented Education**

**EDUCATION EXPERIENCE**

**West Ada School District (Joint School District #2)**

1303 E. Central Drive, Meridian, ID 83642

**Director of Special Education, 504 Compliance Officer**

2015-Present

*Responsible to oversee budget, personnel, and program implementation for Special Education in a school district of 40,000 students*

**Weiser School District #431**

925 Pioneer Road, Weiser, ID 83672

**Director of Special Education and Federal Programs**

2012-2015

*Responsible to oversee budget, personnel, and program implementation for: Special Education, State LEP, Title III, Homeless, Title I-A, Title I-C (Migrant), and Rural Low-Income Schools programs*

**Fruitland School District #373**

P.O. Box A, Fruitland, ID 83619

2001-2012

*Special Education Teacher, Grades 7-8, (2001 –2004)  
Special Education Director (2004-2012); District Homeless Liaison (2010-2012);  
LEP/Migrant Coordinator (2011-2012); Alternative School Director (2007-2011)*

**Kamiah School District #304**

401 Hill Street, Kamiah, ID 83536

1993-2001

*Special Education Teacher, Grades 5-8*

**Lewiston Independent School District #1**

3317 12<sup>th</sup> Street, Lewiston, ID 83501

1992-1993

*Special Education Teacher, High School Severe Disabilities Classroom*

**RELATED POSITIONS / EXPERIENCE**

Idaho Professional Standards Commission, representing special education directors and IASEA, (2020-present)

Council for Administrators of Special Education (CASE); member of national professional development committee, (2021-present)

Idaho Special Education Director's Advisory Council (DAC); (2016-2019)

IESDB (Idaho Bureau of Educational Services for the Deaf and the Blind), Board member representing special education directors (2009-2017)

IASEA (Idaho Association of Special Education Administrators) Executive Board 2011-2014; President 2012-2013

Idaho CEC (Idaho Council for Exceptional Children) Executive Board 2016-2018; President 2017

Idaho SDE Special Education Director's Advisory Council (DAC), 2016-2020

Severe Disabilities Teacher Certificate Advisory Group, (2008-2012)

Interagency Autism Planning Group (IAPG), (2010-2012)

Idaho LEADS project, Member of Fruitland team (2012)

SDE Smarter Balanced Advisory Committee (2014) representing special education directors

Medicaid Advisory Committee (2013-2016)

Chair of Interagency Agreement Comment workgroup (2014)

**WORK WITH ADULT LEARNERS**

CTOPP trained (Comprehensive Training of Paraprofessionals)

Conducted district-level paraprofessional trainings annually

Professional Development instructor for Northwest Nazarene University

Curriculum writer for special education coursework for Northwest Nazarene University

Adjust instructor for Boise State University (2018-2022) and Northwest Nazarene University (2021-2022)

**AWARDS**

Educator of the Year, Fruitland Chamber of Commerce 2008

Educator of the Year, Kamiah Masonic Lodge 2000

RAMONA LEE

**PROFESSIONAL MEMBERSHIPS**

Association for Supervision and Curriculum Development (ASCD)  
Council for Exceptional Children (CEC)  
Council for Administrators of Special Education (CASE)  
Idaho Association of Special Education Administrators (IASEA)

**INTERESTS**

Farming, Reading, Playing Guitar, Fly Fishing, Travel, Church Service, 4-H, MathCounts

**PROFESSIONAL REFERENCES**

Marcus Myers, Chief Academic Officer, West Ada School District, 1303 E. Central Drive, Meridian, ID 83642 (208) 350-5042

Dr. Mary Ann Ranells, former Superintendent, West Ada School District, 1303 E. Central Drive, Meridian, ID 83642, (208) 855-4500

Bret Heller, Assistant Superintendent, West Ada School District, 1303 E. Central Drive, Meridian, ID 83642, (208) 855-4500

Wade Wilson, Superintendent, Weiser School District #431, 925 Pioneer Road, Weiser, ID 83672, (208) 414-0616

Dr. Charlie Silva, Director of Special Education, Idaho State Department of Education, 640 West State Street, Boise, ID 83702, (208) 332-6806

Julie Solberg, School Psychologist (Retired), 1006 Aldape Cove, Boise, ID 83712, (208) 850-8313

Dave Davies, Principal, Weiser High School, 690 W. Indianhead Road, Weiser, ID 83672, (208) 414-2595

Darcy Beck, Special Education Supervisor, West Ada School District, 1303 E. Central Drive, Meridian, ID 83642, (208) 350-5117