

**PLANNING, POLICY & GOVERNMENTAL AFFAIRS
JUNE 19-20, 2008**

TAB	DESCRIPTION	ACTION
1	PRESIDENT’S COUNCIL REPORT	Information Item
2	EASTERN IDAHO TECHNICAL COLLEGE REPORT	Information Item
3	IDAHO PUBLIC TELEVISION PROGRESS REPORT	Information Item
4	IDAHO DIGITAL LEARNING ACADEMY ANNUAL REPORT	Motion to Approve
5	REAPPOINTMENT OF IDAHO BOARD OF LIBRARY COMMISSIONERS APPOINTMENT	Motion to Approve
6	APPROVAL OF UNIVERSITY OF IDAHO ALCOHOL WAIVER REQUEST FOR 2008 HOME FOOTBALL GAMES	Motion to Approve
7	TEMPORARY/PROPOSED RULE CHANGE – IDAPA 08.02.03.111 - Assessment in the Public Schools	Motion to Approve
8	TEMPORARY/PROPOSED RULE CHANGE – IDAPA 08.01.04 – Rules Governing Residency Classification	Motion to Approve
9	PROPOSED RULE CHANGE – IDAPA 08.02.04.300 - Rules Governing Public Charter Schools	Motion to Approve
10	PROPOSED RULE CHANGE – IDAPA 47.01.01 - Rules of the Idaho Division of Vocational Rehabilitation	Motion to Approve
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12	INSTITUTION/AGENCY 2008 STRATEGIC PLANS	Motion to Approve
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13	INSTITUTION/AGENCY 2008 PERFORMANCE MEASURES	Information Item
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14	2009 LEGISLATIVE IDEAS	Motion to Approve
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SUBJECT

President's Council Report.

BACKGROUND

Monthly report given by the President of the President's Council.

STAFF COMMENTS AND RECOMMENDATIONS

State Board staff offers no comments or recommendations.

BOARD ACTION

This item is for informational purposes only. Any action will be at the Board's discretion.

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SUBJECT

Eastern Idaho Technical College

BACKGROUND

Periodically, the institutions of higher education in the State of Idaho are requested to provide a progress report to the members of the State Board of Education. It has been over one year since Eastern Idaho Technical College has supplied an overview of its status and accomplishments.

DISCUSSION

Bill Robertson, President of Eastern Idaho Technical College, will be in attendance at the meeting and present a summary of the accomplishments and future goals of the university.

IMPACT

President Robertson's presentation will provide the State Board members and others with current status information about Eastern Idaho Technical College.

STAFF COMMENTS AND RECOMMENDATIONS

No staff comments or recommendations are needed at this time.

BOARD ACTION

This item is for informational purposes only. Any action will be at the Board's discretion.

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SUBJECT

Idaho Public Television Progress Report (IPTV).

BACKGROUND

In an effort to allow the agencies under the authority of the State Board of Education an opportunity to present to the State Board of Education on a more regular basis, one of the agencies will be making a presentation before the Board at each meeting. This report will be a progress report and an opportunity for the agency to supply and overview of its status and accomplishments.

DISCUSSION

Mr. Peter Morrill, General Manager of IPTV, will be in attendance at the meeting and present a summary of the accomplishments and future goals of IPTV.

IMPACT

Mr. Morrill's presentation will provide the State Board members and others with current status information about IPTV.

STAFF COMMENTS AND RECOMMENDATIONS

No staff comments or recommendations are needed at this time.

BOARD ACTION

This item is for informational purposes only. Any action will be at the Board's discretion.

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IDAHO DIGITAL LEARNING ACADEMY

SUBJECT

Idaho Digital Learning Academy Annual Report

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-5501, Idaho Code

Idaho Administrative code, IDAPA 08.04.01 Rules Governing the Idaho Digital Learning Academy

BACKGROUND

The 2002 Idaho Legislature created the Idaho Digital Learning Academy (IDLA) as an online, school-choice learning environment (Title 33 Chapter 55, Idaho Code). IDLA is a state virtual school providing Idaho students with greater access to a diverse assortment of courses. This virtual school was created to address the educational needs of all Idaho students: traditional, home schooled, at-risk, and gifted learners and is a service to Idaho students and schools. Rigorous online curriculum delivered by highly qualified faculty assists the state in preparing Idaho students to meet NCLB requirements, Idaho standards, and the increased demand from colleges and industry.

DISCUSSION

According to IDAPA 08.04.01 Rules Governing the Idaho Digital Learning Academy, an annual report is required to be submitted each year to the State Board of Education. This request is to meet the requirements as outlined in the rule. This report will include Accreditation, Acceptable Use, and an IDLA fee schedule in order to be in compliance with statute and State Board rule. Additionally, IDLA will provide an update of the 2007-2008 academic year.

IMPACT

IDLA served over 6,500 enrollments for 2007-2008 which is a 78% increase over last year. 87% of the school districts in the state participated in 2007-2008. The number one reason for taking IDLA courses is scheduling conflicts. Other reasons include credit recovery, course not offered, advanced placement, and early graduation. It is projected that IDLA will serve approximately 9,500 enrollments for 2007-2008.

ATTACHMENTS

Attachment 1 – 2008-2009 Fee Policy Statement	Page 3
Attachment 2 – Acceptable Use Policy	Page 5
Attachment 2 – Accreditation Confirmation	Page 11

STAFF COMMENTS AND RECOMMENDATIONS

State Board staff offers no comments or recommendations.

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BOARD ACTION

This item is for informational purposes only. Any action will be at the Board's discretion.

2008-2009 IDLA FEES POLICY STATEMENT

FEES FOR IDAHO DIGITAL LEARNING ACADEMY:

There will be two fee schedules for 2008-2009 based upon District completion of the IDLA Online Site Coordinator course. These fees apply to all IDLA courses for all sessions.

All IDLA course fees are paid by the district directly to IDLA. Where appropriate, the district will collect fees from the student. IDLA does not collect fees from students. Districts will be billed for all registered students according to the following schedule:

- Summer session - Third week of June classes
- Fall session – Third week of December classes
- Spring session – Third week of March classes

DISTRICTS WITH A SITE COORDINATOR WHO HAS SUCCESSFULLY COMPLETED THE IDLA SITE COORDINATOR CLASS:

For one (1) student for a one (1) semester course is \$50 for Idaho public school students, with the exception of Advanced Placement (AP) and Dual Credit (DC) classes. Effective summer 2008 there will be no IDLA course fees for AP & DC classes (see Other Fees for Advanced Placement/Dual Credit Courses).

DISTRICTS WITH A SITE COORDINATOR WHO HAS NOT COMPLETED THE IDLA SITE COORDINATOR CLASS:

For one (1) student for a one (1) semester course is \$100 for Idaho public school students. The Advanced Placement/Dual Credit fee waiver does not apply.

OUT-OF-STATE, PRIVATE SCHOOL AND ADULT LEARNER FEES:

For one (1) student for one (1) semester course is \$400 for out-of-state, private school, and adult learner students. The Advanced Placement/Dual Credit fee waiver does not apply.

OTHER FEES FOR ADVANCED PLACEMENT/DUAL CREDIT COURSES:

Fees to take the Advanced Placement Exam by the College Board and fees for dual credit to receive college credit may apply. Students in Dual Credit Courses are responsible for all university fees. Advanced Placement and Dual Credit courses may require additional textbooks (see below).

TEXTBOOKS:

IDLA provides online textbooks in the majority of content areas and provides access to Libraries Linking Idaho (LiLI-D). In cases where an online textbook is unavailable, the local school district may be responsible to provide the required text(s) according to school district policy. For example, advanced placement, dual credit, and English courses may require additional textbooks or required readings not available online. The local school district is also responsible to

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provide access and assistance to library media centers if necessary. Please refer to the IDLA Course Catalog posted at www.IdahoDigitalLearning.org for a list of required textbooks.

CHANGES FOR 2008-2009:

1. Effective summer 2008 there will be no IDLA course fee for AP & DC classes (see Other Fees for Advanced Placement/Dual Credit Courses).
2. Scholarships are available for qualifying students. Site coordinators may request a scholarship through their Regional Coordinator.

IDLA ACCEPTABLE USE POLICY

Students should print and review this policy with a parent or guardian to ensure a safe and rewarding experience with IDLA. All students enrolled in any course work of Idaho Digital Learning Academy (IDLA) shall be responsible to comply with all of the policies of their home school district and the policies of IDLA including this Acceptable Use Policy (AUP).

1. The IDLA network is for educational purposes only and includes computers, communication networks, the Internet, and other electronic resources used in the delivery of IDLA courses.
2. All users of IDLA must agree to all of the terms of this AUP prior to being able to access a user account providing access to the IDLA network.
3. Privileges and Rights of IDLA Community Members:

Members of the IDLA community have certain privileges and rights. These include:

- A. Safety
 - IDLA shall attempt to block access on the IDLA network to inappropriate visual depictions that are obscene, contain child pornography, or are otherwise harmful to minors, including, but not limited to graphic sexual depiction or violence and advocacy of illegal substance use. No student or IDLA personnel shall utilize the IDLA network to access any site that includes, but is not limited to pornography, graphic sexual or violent content, or advocates the use of illegal substances.
 - Communication on the IDLA network shall respect the privacy of all individuals and shall not contain personal information regarding the individual user or other persons.
 - Bullying or harassment of IDLA users shall not be tolerated. No user of the IDLA network shall engage in any communication or entry that shall have the intent of, or results in, the bullying or harassment of other students or employees of IDLA or utilizes profanity or degrading language directed at known persons. Any user who receives, or believes they are subject of, such communications should immediately notify the IDLA online principal.
 - For reasons of privacy and safety, users are prohibited from downloading or uploading photographs of persons other than as may be directly relevant to the required coursework, and any depiction of fellow students or IDLA personnel is expressly prohibited without the

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written permission of the individual, or permission of that individual's parent or legal guardian if the individual is a minor.

- Any graphic or digital representation must be presented in an appropriate manner in accordance with the local school district's dress code policy. IDLA reserves the right to determine whether a graphic representation is appropriate and to respond accordingly.

B. Access for all users

All IDLA users shall be granted access to as many IDLA services as the available technology and IDLA role will allow. Relevant exploration of the Internet for educational purposes is permissible in IDLA courses within the limitations of compliance with this policy and the acknowledgement that certain sites may be offensive to specific individuals. IDLA will make every effort to ensure that course content will be appropriate to the designated grade-level of that course, regardless of the ages of students enrolled in that course.

C. Intellectual Freedom

- Discussion forums within the IDLA course management system are a free and open forum for expression, including all viewpoints within the role and mission of IDLA. The poster of an opinion should be aware that other community members may be openly critical of such opinions.
- Any statement of personal belief is implicitly understood to be representative of the author's individual point of view, and not that of the IDLA, its administrators, teachers, other staff, or the participating schools. Personal attacks are not an acceptable use of IDLA resources at any time and IDLA instructional staff or administration should be notified. IDLA does not officially endorse any opinions stated on the network.

D. Privacy

In guarding the safety of its students and users, there is no reasonable expectation of privacy in any use of the IDLA network by any user. IDLA is a public educational agency and therefore IDLA personnel, both technology specialists and teaching and/or administrative staff, may periodically access accounts, review emails sent or received, internet sites (including any social networking websites) and chat rooms visited, as well as electronic class discussion materials.

4. The Family Educational Rights and Privacy Act (FERPA)

The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) is a Federal law that protects the privacy of student education records.

FERPA gives parents certain rights with respect to their children's education records. These rights transfer to the student when he or she reaches the age of 18 or attends a school beyond the high school level. Students to whom the rights have transferred are "eligible students."

- Parents or eligible students have the right to inspect and review the student's education records maintained by the school. Schools are not required to provide copies of records unless, for reasons such as great distance, it is impossible for parents or eligible students to review the records. Schools may charge a fee for copies.
- Parents or eligible students have the right to request that a school correct records which they believe to be inaccurate or misleading. If the school decides not to amend the record, the parent or eligible student then has the right to a formal hearing. After the hearing, if the school still decides not to amend the record, the parent or eligible student has the right to place a statement with the record setting forth his or her view about the contested information.
- Generally, schools must have written permission from the parent or eligible student in order to release any information from a student's education record. However, FERPA allows schools to disclose those records, without consent, to the following parties or under the following conditions (34 CFR § 99.31):
 - School officials with legitimate educational interest;
 - Other schools to which a student is transferring;
 - Specified officials for audit or evaluation purposes;
 - Appropriate parties in connection with financial aid to a student;
 - Organizations conducting certain studies for or on behalf of the school;
 - Accrediting organizations;
 - To comply with a judicial order or lawfully issued subpoena;
 - Appropriate officials in cases of health and safety emergencies; and
 - State and local authorities, within a juvenile justice system, pursuant to specific State law.

5. Responsibilities of IDLA users

With the rights and privileges of participation in the IDLA community come certain responsibilities. IDLA users need to familiarize themselves with these responsibilities.

A. Using appropriate language

Profanity or obscenity will not be tolerated. All IDLA community members must use language appropriate for school situations. Inappropriate language includes, but is not limited to language that is: defamatory, inaccurate, abusive, rude, sexually explicit, threatening, harassing, or racially offensive;

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- B. Avoiding offensive or inflammatory speech
IDLA users must respect the rights of others both in IDLA courses and in the Internet at large. Personal attacks are an unacceptable use of the network. If an IDLA user is the victim of a personal attack, they are responsible to bring the incident to the attention of an IDLA teacher or administrator.

- C. Copyright adherence
IDLA users must respect all copyright issues regarding software, information, and attributions of authorship. The unauthorized copying or transfer of copyrighted materials may result in the loss of IDLA privileges.

- D. Plagiarism
IDLA users must not engage in plagiarism, which is the act of presenting other peoples' ideas, writings, or products (written or electronic) by claiming them to be one's own and not giving credit to these sources. Forms of plagiarism include: submitting work that is not your own, failing to properly cite words and ideas that are not your own, using direct wording from another source (even a cited one) without quotation marks, or slightly re-wording phrases from another source and passing the phrases as your own.

- E. Cheating
IDLA users must not engage in cheating, which in its various forms includes, but is not limited to: copying another student's work or allowing your work to be copied; allowing someone other than yourself to submit work in your name; using unauthorized assistance on an assessment; allowing someone other than yourself to take an assessment; inappropriate use of a translator in language classes; submitting the same work for multiple courses; or giving answers to other students.

- F. Fabricating Data
IDLA users must not engage in fabricating data when completing assignments that require research and/or collecting data. Forms of fabrication include, but are not limited to: falsifying or manipulating data to achieve a desired result; reporting data for an experiment that was not conducted (dry-labbing); or submitting written work with fabricated or falsified sources.

- G. Academic Sabotage
IDLA users must not engage in Academic sabotage, which consists of any act that damages another student's work or grade on purpose.

- H. False Information
IDLA users must not lie to an instructor, site coordinator, parent, or principal (such as saying an assignment has been completed when it has

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not, or lying about your grade).

- I. **Illegal activities**
Illegal activities include tampering with IDLA computer hardware or software, unauthorized entry into computers, knowledgeable vandalism or destruction of computer files, or encouraging the use of illegal materials. Use of the IDLA for any illegal activities is prohibited and will result in legal action.
- J. **System disruption**
Intentional or malicious attempts to degrade or disrupt system performance of the IDLA or any other computer system or network are considered criminal activity under state and federal law. IDLA encourages IDLA users to use best practices to avoid unintentional disruption of system performance.
- K. **Account responsibility**
IDLA users have full responsibility for the use of their account. All violations of this policy traced to an individual account name will be treated as the sole responsibility of the owner of that account.
- L. **User information**
IDLA mandates all users to provide current demographic information which includes but is not limited to full name, mailing address, email address, and phone number.
- M. **Impersonation**
All IDLA users must use their own name in the use of the IDLA network. Impersonation (logging in as another user, or under a false name) is not allowed. (This prohibition does not extend to activities with curricular objectives, such as role-playing within a class discussion, in which users are not attempting to disguise their identities).
- N. **Anonymity**
All IDLA users must use their name on all communication. Anonymity is not allowed. As an educational network, we believe that individuals are responsible for their actions and words;
- O. **Representation.**
When navigating locations on the Internet or using IDLA tools, IDLA users must conduct themselves as representatives of both their respective schools and the IDLA.
- P. **Email Communication**
Email accounts are required to communicate on the IDLA network, and

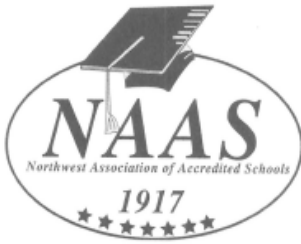
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inappropriate email user account names will not be allowed in the system.

6. IDLA assumes no responsibility for Internet access including phone charges, line costs, usage fees, hardware, software, other media, or any other non-specified technology costs associated with a user's connectivity to the Internet or that may be required to access IDLA courses or other instructional resources. IDLA assumes no responsibility for information obtained via the Internet, which may be illegal, defamatory, inaccurate or offensive. IDLA assumes no responsibility for any damages to the user's computer system under any circumstances. The technology requirements of all courses are available on the IDLA website prior to enrollment. Users are solely responsible for acquiring and learning to use all required technology needed to access and complete all online IDLA courses activities.
7. Failure to abide by the IDLA Acceptable Use Policy could result in:
 - Report to the local district of the infraction
 - Immediate removal of the user's access to IDLA instructional computing resources, which could result in their inability to complete learning activities and subsequent course failure.
 - Immediate removal of the user from the course.
 - Involvement of law enforcement agencies and possible legal action.

IDLA reserves the right to make modifications to the document at any time without prior notification.

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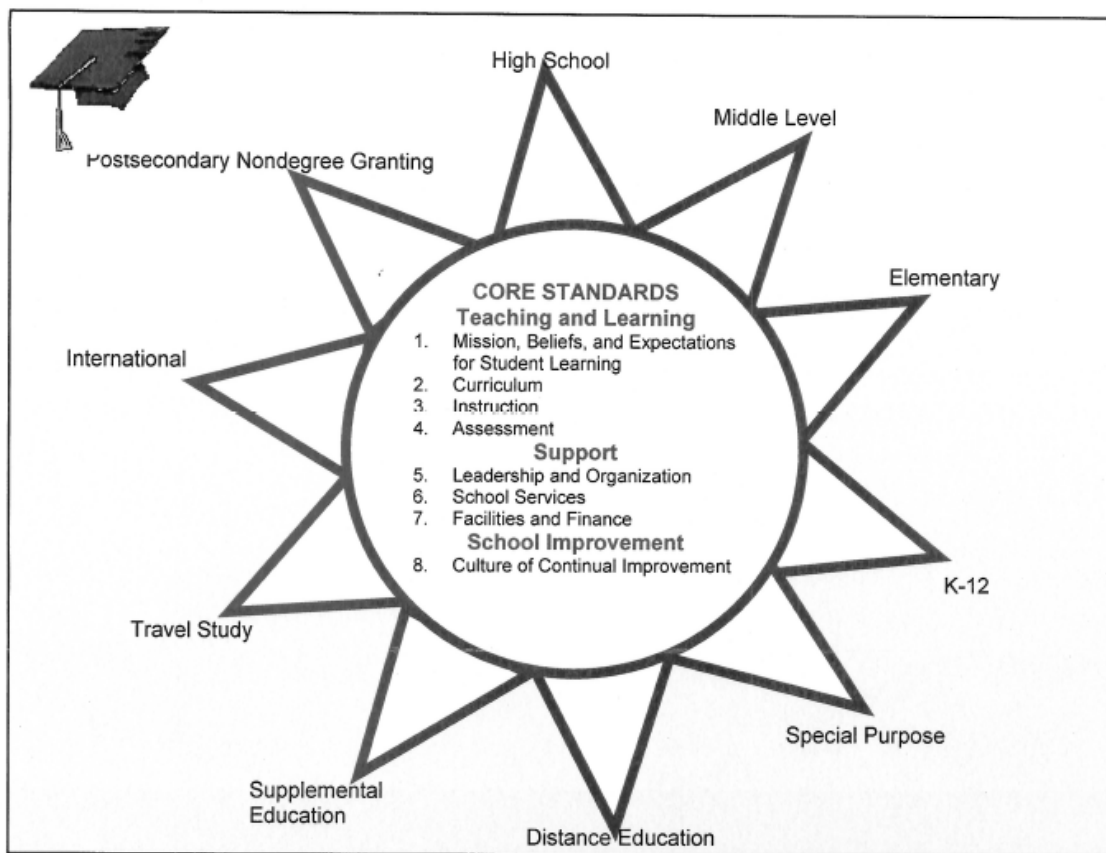
Northwest Association of Accredited Schools

"...advancing excellence in education through the process of accreditation."

May 7, 2008

I am writing to confirm that Idaho Digital Learning located Academy in Boise, Idaho is an accredited school of the Northwest Association of Accredited Schools since 2002. This school is approved for use in a school setting. The Northwest Association of Accredited Schools is one of six regional accrediting associations in the United States of America and has been in existence since 1917. We evaluated this school based on the following standards:

CORE STANDARDS



Sincerely,


Shelli D. Clemens

Northwest Association of Accredited Schools ★ 1510 Robert Street, Suite 103 ★ Boise, ID 83705-5194
Phone: 208.493.5077 ★ Fax: 208.334.3228
Website: www.NorthwestAccreditation.org ★ Email: Info@NorthwestAccreditation.org

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IDAHO COMMISSION FOR LIBRARIES

SUBJECT

Reappointment to the Idaho Board of Library Commissioners – R. Bruce Noble

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures; Section IV. H.
1. (1). Idaho Code, 33-2502

BACKGROUND

The State Board of Education has statutory authority in the appointment and reappointment of members to the Board of Library Commissioners.

DISCUSSION

Mr. Noble is very interested in continuing his service on the Board of Library Commissioners as representative from North Idaho. Mr. Noble has served 9 years as an active member of this Board. Mr. Noble indicates in his letter of interest that he is a lifelong patron of Idaho libraries and that he also brings to the Board knowledge of Idaho Commission for Libraries' policies and functions which he has gained through his years of service. He participated in library related workshops and attended state-wide library conferences during his tenure.

Idaho Board of Library Commissioners motion from their 4/26/2007 meeting:

MSC Rognas/Black that the Idaho Board of Library Commissioners endorse the reappointment of R. Bruce Noble to the Board for a term beginning July 1, 2008 and ending June 30, 2013.

ATTACHMENTS

Attachment 1 – Applicant Reappointment Request Letter

Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Staff has reviewed the letter of interest for R. Bruce Noble and recommends approval of the reappointment.

BOARD ACTION

Motion to approve the reappointment of R. Bruce Noble to the Idaho Board of Library Commissioners for a term beginning July 1, 2008 and ending June 30, 2013.

Moved by _____ Seconded by _____ Carried Yes_____ No_____

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April 21, 2008

Ann Joslin, State Librarian
Idaho Commission for Libraries
325 West State Street
Boise, ID 83702

Dear Ann:

This letter is a request that you place my name before the Idaho State Board of Education for reappointment for the position of Commissioner of the Idaho Commission for Libraries.

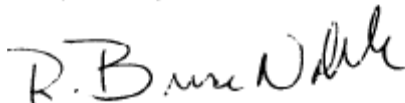
As an engineer with a library arts education, and a lifelong patron of Idaho libraries, I believe I have a well rounded perspective on the ever changing place of libraries in our society.

Having served three terms as Trustee and Commissioner, I bring to the board the knowledge of Idaho Commission for Libraries' policies and functions which has been gained in my service. I believe this experience to be invaluable as the Commission evolves into an institution geared toward assisting libraries to build the capacity to better serve their clientele.

The greatest asset I bring to the Board of Library Commissioners is my belief that the Commission and its staff provide a valuable and necessary service to the citizens of Idaho and specifically the library patrons of Idaho. To continue as a member of this worthy team prompts my request for reappointment.

Thank you for your consideration.

Respectfully,

A handwritten signature in dark ink, appearing to read "R. Bruce Noble". The signature is fluid and cursive, with the first name "R." and last name "Noble" clearly distinguishable.

R. Bruce Noble

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Idaho Statutes

TITLE 33
EDUCATION
CHAPTER 25

COMMISSION FOR LIBRARIES

33-2502. BOARD OF LIBRARY COMMISSIONERS -- MEMBERSHIP -- OFFICERS -- MEETINGS -- COMPENSATION. The Idaho commission for libraries shall be governed by the board of library commissioners. The board of library commissioners shall be maintained within the office of the state board of education and shall consist of five (5) commissioners appointed by the state board of education. The state board of education shall annually appoint one (1) commissioner for a term of five (5) years. The board of library commissioners shall annually elect a chairman, vice chairman and other officers as it deems reasonably necessary. The board of library commissioners shall meet at least twice each year. Commissioners shall be compensated as provided by section 59-509(n), Idaho Code.

Idaho State Board of Education

GOVERNING POLICIES AND PROCEDURES

SECTION: IV. ORGANIZATION SPECIFIC POLICIES AND PROCEDURES

Subsection: H. Idaho State Library

August 2006

H. Idaho Commission for Libraries

The Idaho Commission for Libraries assists libraries to build the capacity to better serve their clientele.

1. Board of Library Commissioners.

- a. The Board of Library Commissioners consists of five (5) commissioners appointed by the State Board of Education. OSBE shall annually appoint one commissioner for a term of five (5) years.
- b. Board Appointment Procedures:
 - (1) Incumbent Reappointment
In the event that the incumbent candidate is interested in reappointment, the Board of Library Commissioners shall forward a recommendation to the Board, along with a letter of interest and statement of qualifications for the incumbent. The State Board of Education may choose to reappoint the incumbent without soliciting other candidates, thus completing the appointment procedures. If there is no incumbent seeking reappointment, or if the Board chooses not to reappoint an incumbent, the procedures are as outlined in item (2).
 - (2) Open Appointment
 - (a) The Board of Library Commissioners, on behalf of the State Board of Education, will advertise the vacancy in appropriate state, regional or local publications. Such advertisements will solicit interested persons to apply for the vacant position on the Idaho Board of Library Commissioners.
 - (b) Each applicant must provide a written statement expressing his or her interest in becoming a member of the Board of Library Commissioners. Each applicant must also provide evidence of his or her qualifications, and must identify his or her primary residence.
 - (c) The Board of Library Commissioners will review all applications for the vacant position and conduct interviews as deemed necessary. The purpose of this review is to eliminate from further consideration all but the most qualified applicants.

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- (d) The Board of Library Commissioners will forward only the most highly qualified applicants, in order of preference, to the State Board of Education for consideration.

The Board may provide for interviews of the applicants, or may make the appointment based on the recommendation of the Board of Library Commissioners.

- (3) The Board of Library Commissioners, in making their recommendation, and the State Board of Education, in making the final appointment, shall consider geographical representation, interest, knowledge, experience, and willingness to advocate for the development and delivery of library and information services in Idaho.

2. Policies and Procedures.

The Board of Library Commissioners elects its own officers and makes all necessary rules for the conduct of the public business entrusted to its care.

3. Budgetary and Other Matters.

The Board of Library Commissioners, through its chief executive officer, submits an annual budget request to the State Board of Education on a schedule established by the executive director or his or her designee. Other matters that might involve the Commission for Libraries are referred to in these Governing Policies and Procedures of the State Board of Education.

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UNIVERSITY OF IDAHO

SUBJECT

The University of Idaho requests Board approval to establish secure areas for the purpose of allowing pre-game activities that include the service of alcohol for the 2008 football season.

REFERENCE

August 12, 2004	Board approved a request by UI to establish secure areas for pre-game activities that serve alcohol for 2004 football season.
March 10, 2005	Board approved a request by UI to establish secure areas for pre-game activities that serve alcohol for 2005 football season.
March of 2005	President White reported that there had been no serious incidences regarding the pre-game service of alcohol, and further noted that the UI created a restaurant-type atmosphere within the secure areas.
August 2005	Following discussion regarding the presence of supervised minors in the alcohol service areas, the Board amended policy Section I.J. to specifically allow for the persons of the lawful age to consume alcohol to be accompanied by youth for whom they are responsible in the secure alcohol service areas, provided the youth remain at all times under the supervision and control of the individual of lawful age.
August 10, 2006	Board approved a request by UI to establish secure areas for pre-game activities that serve alcohol for 2006 football season.
Fall 2006	This past season (fall of 2006), there were no serious issues or concerns related to the service of alcohol at pre-game events. A wristband policy is in place to better supervise minors in the alcohol service areas.
August 9, 2007	Board approved a request by UI to establish secure areas for pre-game activities that serve alcohol for 2007 football season.
Fall 2007	This past season (fall of 2007), there were no serious issues or concerns related to the service of alcohol at pre-game events. The wristband policy remains in place to better supervise minors in the alcohol service areas.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.J – Use of Institutional Facilities and Services With Regard to the Private Sector

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BACKGROUND

The current Board policy provides that Idaho institutions may not allow service of alcohol on campus in conjunction with athletic events. For the past four football seasons, the Board has granted an exception to the policy under limited circumstances for pre-game events in secure areas.

DISCUSSION

UI seeks permission to set up secure areas prior to each home football game. In the secure areas, patrons may purchase food and beverages (non alcoholic and alcoholic) from Sodexo, the University's official food service provider. The UI will follow all requirements of Board policy regarding alcohol service, and will conduct the pre-game activities under the conditions set out in the motion, which are the same as those set by the Board over the last three years.

There have been no serious incidences regarding the pre-game service of alcohol. UI creates a restaurant-type atmosphere within the secure areas. Feedback on the events has been very positive, and fans appreciated the opportunity to participate in pre-game events. These types of functions are beneficial to the University and are strategic friend- and fund-raising opportunities.

In managing its pre-game functions, UI seeks to provide a safe, fun, and exciting atmosphere that promotes attendance and enhances the game experience. All pre-game activities open four hours prior to kickoff, and all activities cease at kickoff. The secure areas where alcohol is available are fenced or cordoned off, or occur within specifically designated rooms.

- "Vandal Game Day" is focused on adult-based activities and targets active alums or Vandal supporters who come to the game to see acquaintances and meet and socialize with other Vandal fans. Individual schools or groups may reserve tents and seating in this area, located on the North Kibbie Field.
- The "Corporate Tent Area" provides an opportunity for corporate sponsors to reward employees and say "thank you" to valued customers by hosting private functions. This area is located at the Student Activities Field east of the Kibbie Dome.
- The "President's Circle Pre-Game Function" is provided for invited guests and allows the university leadership to mix with the guests. This area is also located on the Student Activities Field, with the Vandal Athletic Center as a rain out location.

IMPACT

Again there have been no serious incidences regarding the pre-game service of alcohol during the Fall 2007 season. Feedback on the events has been very

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positive, and fans appreciated the opportunity to participate in pre-game events. These types of functions are beneficial to the University and are strategic friend-and fund-raising opportunities. In addition, the UI earns commission revenues (20% gross sales) from the sale of food and beverages provided by Sodexo.

The request is for the same events with the same restrictions as the prior year with the following exceptions:

- In item 6 of the proposed motion, we are clarifying that the reference to “2 entry points” is the maximum number of entry points, each of which must be manned by security personnel. Some of the tents in the corporate tent area and the President’s Circle Pre-Game Function may have a single entrance, manned by security personnel. None will have more than two and all entry points will be manned with security personnel.
- The location for President’s Circle Pre-Game Function area is also now defined as within the Student Activities Field east of the Kibbie Dome. This is the same area used for the Corporate Tents.

STAFF COMMENTS AND RECOMMENDATIONS

State Board staff offers no comments or recommendations.

BOARD ACTION

A motion to approve the request by the University of Idaho to establish secure areas for the purpose of allowing the above specified pre-game activities (Vandal Game Day, Corporate Tent Area, and President’s Circle Pre-Game Function) for the 2008 home football season, such events to be in compliance with Board policy section I.J. and the following conditions:

1. The service area shall be secure, surrounded by a fence to control access to and from the area.
2. The pre-game events shall be limited to four hours, ending at kick-off.
3. Alcohol making or distributing companies may not sponsor the activities or tents.
4. UI shall use a color-coded wrist band or pass admission system to identify attendees and invited guests.
5. UI shall send companies sponsoring a corporate tent a letter outlining the Board alcohol policy and further conditions set by the Board. The letter will state that the minimum drinking age in Idaho is 21 and that at no time may they allow any underage drinking and/or serving of alcohol to visibly intoxicated patrons.
6. There must be no more than two entry points, each manned by security personnel, for the secure area.
7. Security personnel shall be located throughout the secure service to monitor use of wristbands, patron behavior, and entrance and exit.
8. No person may exit the secure area with alcoholic beverages.

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9. Tent sponsors shall insure and indemnify the State of Idaho, the State Board of Education and Board of Regents of the University of Idaho and the University of Idaho for a minimum of \$2,000,000, and shall obtain the proper permits and licenses.
10. The area is for sponsors to entertain clients/guests for the fall of 2007 home football games, including the sales and service of alcohol.
11. This exception is only for the 2008 football season; the University shall bring the matter back to the Board after the conclusion of the 2008 football season for reconsideration for 2009.

Moved by _____ Seconded by _____ Carried Yes ____ No ____

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SUBJECT

Temporary/Proposed Rule Governing Thoroughness, IDAPA 08.02.03.111
Assessment in the Public Schools

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.03 - Section 111, as amended
No Child Left Behind Act of 2001. Section 1111(b)(3)(c)(v)(I)
Non-Regulatory Guidance: Assessment and Accountability for Recently Arrived
and Former Limited English Proficient (LEP) Students May 2007

BACKGROUND

The federal requirements under the No Child Left Behind Act of 2001 for statewide standard achievement testing are for testing in grades 3-8 and once in high school. Idaho has chosen to test in grade 10 as the year required for high school. Additionally, the State Board of Education implemented rules requiring testing in grades 2 and 9 and requiring an additional fall administration for grades 2-10.

In 2007, the U.S. Department of Education released non-regulatory guidance that stated first year limited English proficient (LEP) students are required to take the standard achievement tests for not only math, but science as well, beginning in 2008. The science requirement has been communicated to Idaho school districts, but has not yet been inserted into Board Rule.

DISCUSSION

The Board's Rule currently requires testing of grades 2-10 in the fall and spring. Fall testing and the 2nd and 9th grade Idaho Standards Achievement Tests (ISAT) are not required for federal accountability. The governor has requested that Idaho review the costs associated with the statewide assessments. As a cost savings measure and because grades 2 and 9 are optional, the Board directed the testing vendor to stop development of ISAT in grades 2 and 9. In July of 2007, the Board convened a committee comprised of members from the State Board of Education, educational stakeholders, and various school districts across the state to assist the educational aspects of the assessment system. The committee was co-chaired by Board Member Richard Westerberg and Superintendent Tom Luna and met several times, completing their work in April 2008. The committee recommended a statewide survey of educators to provide broad input from the educational community and that survey was completed. Twenty-four hundred respondents were included in the report of results. The committee considered survey results in their recommendations to the Board. The committee recommends that ISAT testing in grades 2 and 9 be eliminated.

The Board's Rule currently requires testing students in the fall as a part of the overall ISAT system. The fall ISAT is a carryover from the previous vendor and precedes the requirements of No Child Left Behind. Based on the survey and committee members experience it is clear that use of the data from the fall ISAT

varies with each district. The Board Assessment Committee concluded that the fall test is well utilized in schools and districts for educational planning for some students (students new to the district, low achieving, and at-risk), but is burdensome to test “all students”. The committee was informed that there is no cost savings in making the fall ISAT optional. The committee recommended that the fall test be made optional at the district, school, student and content area.

If the fall ISAT is made optional, the full cost of offering an online test would still apply. This is due to: (1) the cost of preparing the test and the software, network and infrastructure to deliver the assessment online is the same for one student or thousands; and (2) the adaptive nature (not on-grade-level) of the test for math and language and partially adaptive for reading is expensive. (Science, offered at only three grades 5, 7, and 10 cannot be adaptive). Therefore, there would be no significant cost savings at the state level by making the fall ISAT optional.

Federal regulations require that first year limited English proficient (LEP) students be assessed in math and science, yet be exempted from reading and language usage. When the current Board Rule was written, the science ISAT was not yet in place. Now that science is a part of the comprehensive assessment program, it needs to be added to the requirements for first year LEP students.

The changes in Board Rule seek to remove the requirement for administering ISAT reading, language usage, and math in grades 2, 9, and make fall testing optional. In addition it would add the requirement to Board Rule for first year LEP students in grades 5,7, and 10 to take the science ISAT.

IMPACT

The impact of eliminating the grade 2 ISAT is that schools and districts would be relieved of the burden of testing one grade level, approximately 18,000 students statewide. The educational impact would be that student achievement in reading would be monitored and assessed only by the Idaho Reading Indicator and the monitoring of math and language usage would have to be managed at the classroom, school and district level.

The positive impact of eliminating the grade 9 ISAT is that schools and districts would be relieved of the burden of testing one grade level, approximately 18,000 students statewide. The educational impact would be that the monitoring of student achievement in math, reading and language usage would default to the district for the classroom, school and district levels. This would add a burden to districts that are not currently using standards-based assessments for classroom, school and district monitoring. For those school districts that have already implemented standards-based assessments, there would be little negative impact. For students who are at risk of not passing the graduation test, it is conceivable that a student would be assessed in spring of grade 8 and not be assessed again until fall of 9th grade. Many schools report that the 9th grade test is a determining factor in planning interventions for those students who appear to

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be progressing at a rate that leaves them unprepared to pass the 10th grade test, especially the high stakes Spring ISAT Graduation Test.

The positive impact of making the fall ISAT optional is the lifting of the burden of testing all students 3-8 and 10 twice annually. Continuing to offer a statewide online adaptive test for a portion of the population, as requested by the Board Assessment Committee, would not reduce the cost of the test as we have no way of planning for which students would or would not test. Our vendor would be prepared to test the full population of grades 3-8 and 10. Minimally negative, no grade, school, or district reports could be generated with partial populations taking the test. The statewide assessment survey sent out in spring 2008 was inconclusive and indicated that schools and districts reported mixed opinions of whether it would be better to *continue as is, eliminate fall testing, or make the fall test optional*. For those at-risk students approaching the graduation test, it is conceivable that a student would be assessed in spring of grade 8 and not assessed again until the first administration of the graduation test in the spring of 10th grade. With the option, districts and schools will have the final say in this matter.

ATTACHMENTS

Attachment 1 – Proposed Amendment to Rules Governing Thoroughness IDAPA
08.02.03.111 Assessment in the Public Schools Page 5

STAFF COMMENTS AND RECOMMENDATIONS

Second grade ISAT: Board staff recommends the elimination of the grade 2 ISAT.

Ninth grade ISAT: Board staff is concerned about skipping a year between 8th and 10th grade testing and missing one data point for all of the at-risk populations. However, Board staff recommends the elimination of the grade 9 ISAT based on financial issues only.

Fall ISAT: Board staff believes that funds spent on an optional fall test for a potentially small percentage of students might be better spent on other needs in the Comprehensive Assessment Program. There is no way to predict the number of schools and districts that will take advantage of an optional Fall ISAT. The Board will be able to consider the continuation or elimination of fall testing in again in 2009 when the actual numbers tested and the dollars spent to provide the fall test are available. Board staff recommends amending the rule to make the Fall ISAT testing optional at the district, school grade level and student level.

Including Science for LEP students: Board staff recommends the approval of the rule changes to include the administration of the ISAT science test for first year LEP students.

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BOARD ACTION

A motion to approve the Temporary and Proposed Rule change to IDAPA 08.02.03.111.06(c) to eliminate the ISAT in grade 2, effective August 15, 2008.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

A motion to approve the Temporary and Proposed Rule change to IDAPA 08.02.03.111.06(j) to eliminate the ISAT in grade 9, effective August 15, 2008.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

A motion to approve Temporary and Proposed Rule change to IDAPA 08.02.03.111.07 to make the fall ISAT optional, effective August 15, 2008.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

A motion to approve Temporary and Proposed Rule change to IDAPA 08.02.03.111.04 to include the science requirement for first year LEP students, effective August 15, 2008.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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IDAPA 08
TITLE 02
CHAPTER 03

08.02.03 - RULES GOVERNING THOROUGHNESS

111. ASSESSMENT IN THE PUBLIC SCHOOLS.

01. Philosophy. Acquiring the basic skills is essential to realization of full educational, vocational and personal/social development. Since Idaho schools are responsible for instruction in the basic scholastic skills, the State Board of Education has a vested interest in regularly surveying student skill acquisition as an index of the effectiveness of the educational program. This information can best be secured through objective assessment of student growth. The State Board of Education will provide oversight for all components of the comprehensive assessment program. (4-2-08)

- 02. Purposes.** The purpose of assessment in the public schools is to: (3-15-02)
- a.** Measure and improve student achievement; (3-15-02)
 - b.** Assist classroom teachers in designing lessons; (3-15-02)
 - c.** Identify areas needing intervention and remediation, and acceleration; (3-15-02)
 - d.** Assist school districts in evaluating local curriculum and instructional practices in order to make needed curriculum adjustments; (3-15-02)
 - e.** Inform parents and guardians of their child's progress; (3-15-02)
 - f.** Provide comparative local, state and national data regarding the achievement of students in essential skill areas; (3-15-02)
 - g.** Identify performance trends in student achievement across grade levels tested and student growth over time; and (3-15-02)
 - h.** Help determine technical assistance/consultation priorities for the State Department of Education. (3-15-02)

03. Content. The comprehensive assessment program will consist of multiple assessments, including, the Idaho Reading Indicator (IRI), the Direct Writing Assessment (DWA), the Direct Mathematics Assessment (DMA), the National Assessment of Educational Progress (NAEP), the Idaho English Language Assessment, the Idaho Standards Achievement Tests (ISAT), and the Idaho Alternate Assessment. (4-2-08)

04. Testing Population. All students in Idaho public schools, grades kindergarten through twelve (K-12), are required to participate in the comprehensive assessment program approved by the State Board of Education and funded. (4-2-08)

- a.** All students who are eligible for special education shall participate in the statewide assessment program. (4-6-05)
- b.** Each student's individualized education program team shall determine whether the student shall participate in the regular assessment without accommodations, the regular assessment with accommodations or adaptations, or whether the student qualifies for and shall participate in the alternate assessment. (4-6-05)
- c.** Limited English Proficient (LEP) students, as defined in Subsection 112.03.d.iv., who receive a score below the fluent level on the Idaho English Language Assessment and have an Education Learning Plan

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(ELP), shall be given the ISAT with accommodations or adaptations as outlined in the ELP. Students can be categorized as LEP students for two (2) years after testing proficient on the language proficiency test and exiting the LEP program. LEP students who do not have an ELP or a language acquisition score will be given the regular ISAT without accommodations or adaptations. LEP students who are enrolled in their first year of school in the United States may take the IELA in lieu of the reading/language usage ISAT, but will still be required to take the math and science ISAT with accommodations or adaptations as determined by the language proficiency score and ELP. Such LEP students will be counted as participants for the ninety-five percent (95%) participation target, as described in Subsection 112.03. However, such LEP students are not required to be counted for AYP purposes in determining proficiency, as described in Subsection 112.02. ~~(4-2-08)~~ (8-15-08)T

05. Scoring and Report Formats. Scores will be provided for each subject area assessed and reported in standard scores, benchmark scores, or holistic scores. Test results will be presented in a class list report of student scores, building/district summaries, content area criterion reports by skill, disaggregated group reports, and pressure sensitive labels as appropriate. Information about the number of students who are eligible for special education who participate in regular and alternate assessments, and their performance results, shall be included in reports to the public if it is statistically sound to do so and would not disclose performance results identifiable to individual students. (5-3-03)

06. Comprehensive Assessment Program. The State approved comprehensive assessment program is outlined in Subsections 111.06.a. through 111.06.l. Each assessment will be comprehensive of and aligned to the Idaho State Content Standards it is intended to assess. In addition, districts are responsible for writing and implementing assessments in those standards not assessed by the state assessment program. (4-2-08)

a. Kindergarten - Idaho Reading Indicator, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

b. Grade 1 - Idaho Reading Indicator, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

c. Grade 2 - Idaho Reading Indicator, ~~Grade 2 Idaho Standards Achievement Tests~~, Idaho Alternate Assessment, Idaho English Language Assessment. ~~(4-2-08)~~ (8-15-08)T

d. Grade 3 - Idaho Reading Indicator, Grade 3 Idaho Standards Achievement Tests, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

e. Grade 4 - Direct Math Assessment, National Assessment of Educational Progress, Grade 4 Idaho Standards Achievement Tests, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

f. Grade 5 - Direct Writing Assessment, Grade 5 Idaho Standards Achievement Tests, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

g. Grade 6 - Direct Math Assessment, Grade 6 Idaho Standards Achievement Tests, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

h. Grade 7 - Direct Writing Assessment, Grade 7 Idaho Standards Achievement Tests, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

i. Grade 8 - Direct Math Assessment, National Assessment of Educational Progress, Grade 8 Idaho Standards Achievement Tests, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

j. Grade 9 - Direct Writing Assessment, ~~Grade 9 Idaho Standards Achievement Tests~~, Idaho Alternate Assessment, Idaho English Language Assessment. ~~(4-2-08)~~ (8-15-08)T

k. Grade 10 - High School Idaho Standards Achievement Tests, Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

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- l.** Grade 11 – Idaho English Language Assessment. (4-2-08)
- m.** Grade 12 - National Assessment of Educational Progress, Idaho English Language Assessment. (4-2-08)
- n.** *Students who achieve a proficient or advanced score on a portion or portions of the ISAT, or the Idaho Alternate Assessment, offered in the Spring of their tenth grade year or later are not required to continue taking that portion or portions. (4-2-08)
- 07. Comprehensive Assessment Program Schedule.** (5-3-03)
- a.** The Idaho Reading Indicator will be administered in accordance with Section 33-1614, Idaho Code. (3-15-02)
- b.** The Direct Math Assessment and the Direct Writing Assessment will be administered in December in a time period specified by the State Department of Education. (3-15-02)
- c.** The National Assessment of Educational Progress will be administered in timeframe specified by the U.S. Department of Education. (3-15-02)
- d.** The Idaho Standards Achievement Tests will be administered twice annually in the Fall and Spring in a time period specified by the State Board of Education. The Spring ISAT is required to be administered by all Local Education Agencies (LEAs). The administration of the Fall ISAT shall be optional. ~~(5-3-03)~~ (8-15-08)T
- e.** The Idaho Alternate Assessment will be administered in a time period specified by the State Board of Education. (4-2-08)
- f.** The Idaho English Language Assessment will be administered in a time period specified by the State Board of Education. (4-2-08)
- 08. Costs Paid by the State.** Costs for the following testing activities will be paid by the state: (4-1-97)
- a.** All consumable and non-consumable materials needed to conduct the prescribed statewide comprehensive assessment program; (3-15-02)
- b.** Statewide distribution of all assessment materials; (3-15-02)
- c.** Processing and scoring student response forms, distribution of prescribed reports for the statewide comprehensive assessment program; and (3-15-02)
- d.** Implementation, processing, scoring and distribution of prescribed reports for the Direct Writing Assessment and the Direct Mathematics Assessment. (3-15-02)
- 09. Costs of Additional Services.** Costs for any additional administrations or scoring services not included in the prescribed statewide comprehensive assessment program will be paid by the participating school districts. (3-15-02)
- 10. Services.** The comprehensive assessment program should be scheduled so that a minimum of instructional time is invested. Student time spent in testing will not be charged against attendance requirements. (3-15-02)
- 11. Test Security, Validity and Reliability.** Test security is of the utmost importance. To ensure integrity of secure test items and protect validity and reliability of test outcomes, test security must be maintained. School districts will employ security measures in protecting statewide assessment materials from compromise. Each

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individual who has any opportunity to see test items must sign a state-provided confidentiality agreement, which the district must keep on file in the district for at least two (2) years. Documentation of security safeguards must be available for review by authorized state and federal personnel. (4-2-08)

a. All ISAT paper and pencil test booklets will be boxed and shipped to the test vendor to be counted no later than two (2) weeks after the end of the testing window. (3-20-04)

b. The ISAT will be refreshed each year to provide additional security beginning with grades four (4) eight (8) and ten (10) in 2007. Items will be refreshed for grades three (3) and seven (7) in 2008; and grades five (5) and six (6) in 2009; and grades two (2) and nine (9) in 2010. ~~(3-20-04)~~ (8-15-08)T

c. Any assessment used for federal reporting shall be independently reviewed for reliability, validity, and alignment with the Idaho Content Standards. (4-2-08)

12. Demographic Information. Accurate demographic information must be submitted as required for each test to assist in interpreting test results. It may include but is not limited to race, sex, ethnicity, and special programs, (Title I, English proficiency, migrant status, special education status, gifted and talented status, and socio-economic status). (4-2-08)

13. Dual Enrollment. For the purpose of non-public school student participation in non-academic public school activities as outlined in Section 33-203, Idaho Code, the Idaho State Board of Education recognizes the following: (3-15-02)

a. The Idaho Standards Achievement Tests (grades 2-9 and High School). (5-3-03)

b. A portfolio demonstrating grade level proficiency in at least five (5) of the subject areas listed in Subsections 111.13.b.i. through 111.13.b.vi. Portfolios are to be judged and confirmed by a committee comprised of at least one (1) teacher from each subject area presented in the portfolio and the building principal at the school where dual enrollment is desired. (4-6-05)

i. Language Arts/Communications. (3-15-02)

ii. Math. (3-15-02)

iii. Science. (3-15-02)

iv. Social Studies. (3-15-02)

v. Health. (3-15-02)

vi. Humanities. (3-15-02)

REFERENCE: APPLICABLE STATUTE, RULE, OR POLICY

No Child Left Behind Act of 2001. Section 1111(b)(3)(c)(v)(I)

(C) REQUIREMENTS- Such assessments shall--

- (i) be the same academic assessments used to measure the achievement of all children;
- (ii) be aligned with the State's challenging academic content and student academic achievement standards, and provide coherent information about student attainment of such standards;
- (iii) be used for purposes for which such assessments are valid and reliable, and be consistent with relevant, nationally recognized professional and technical standards;
- (iv) be used only if the State educational agency provides to the Secretary evidence from the test publisher or other relevant sources that the assessments used are of adequate technical quality for each purpose required under this Act and are consistent with the requirements of this section, and such evidence is made public by the Secretary upon request;
- (v)(I) except as otherwise provided for grades 3 through 8 under clause vii, measure the proficiency of students in, at a minimum, mathematics and reading or language arts, and be administered not less than once during--
 - (aa) grades 3 through 5;
 - (bb) grades 6 through 9; and
 - (cc) grades 10 through 12;
- (II) beginning not later than school year 2007-2008, measure the proficiency of all students in science and be administered not less than one time during--
 - (aa) grades 3 through 5;
 - (bb) grades 6 through 9; and
 - (cc) grades 10 through 12;

Assessment and Accountability for Recently Arrived and Former Limited English Proficient (LEP) Students Non-Regulatory Guidance MAY 2007

Page 4. The regulations include testing and accountability flexibility for SEAs and LEAs regarding recently arrived LEP students. The flexibility does not extend to State mathematics assessments or, beginning in the 2007-2008 school year, State science assessments. Recently arrived LEP students must take the State's mathematics assessment, with accommodations as necessary. Beginning in the 2007-2008 school year, recently arrived LEP students also must take the State's science assessment, with accommodations as necessary.

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SUBJECT

Approval of the Temporary and Proposed rule governing Residency Classification, IDAPA 08.01.04

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-105 (1) Executive Department, Idaho Code. Section 33-3717B Residency Requirements, Idaho Code. IDAPA 08.01.04 – Rules Governing Residency Classification

BACKGROUND

During the 2008 session, statutory changes were made to Sections 33-3717B, Idaho Code, revisions to the rule are necessary to comply with the statutory changes.

The Board approved the proposed legislation during the November 2007 Board Meeting.

DISCUSSION

HB 401 was enacted into law during the 2008 legislative session. This legislation followed up the Office of Performance Evaluation (OPE) report from January 2004. Statutory changes are in line with the recommendations of OPE. Changes to the rules are necessary in order for the rule to conform to the statutory changes made during the 2008 legislative session. The temporary and proposed rule clarifies whether full-time, nonresident students are presumed to be in Idaho primarily for educational purposes—unless they clearly demonstrate they are primarily engaged in activities other than those of a student. The statute and proposed rule provide the necessary guidance on this issue.

The statute states that a student who is enrolled for more than eight (8) hours in any semester or quarter during a twelve (12) month period shall be presumed to be in Idaho primarily for educational purposes. Such period of enrollment shall not be counted toward the establishment of a bona fide domicile in this state unless the student proves, in fact, establishment of a bona fide domicile in this state primarily for purposes other than educational.

The statute also identifies the factors needed to show that domicile has been established primarily for purposes other than education. Statute states that institutions determining whether a student is domiciled in the state of Idaho primarily for purposes other than educational shall consider, but shall not be limited to, the following factors:

Any of the following, if done for at least twelve (12) months before the term in which the student proposes to enroll as a resident student, proves the establishment and maintenance of domicile in Idaho for purposes other than educational and supports classification of a student as an Idaho resident:

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- Filing of Idaho state income tax returns covering a period of at least twelve (12) months before the term in which the student proposes to enroll as a resident student;
- Permanent full-time employment or the hourly equivalent thereof in the state of Idaho; or
- Ownership by the student of the student's living quarters.

In addition to the three specified factors, the statute provides seven (7) factors which give support to domiciliary intent, and provides the basis for the rules to consider a rebuttable presumption clause which provides students an additional means of proving domiciliary intent.

Board approval would align rule to current statute, and make a policy decision to provide students a means to prove domiciliary intent and establishment of Idaho residency for purposes of tuition and fees at Idaho public institutions.

IMPACT

There will be no fiscal impact to the general fund as a result of this statute or rule. However, it is not known if this legislation will have an impact on the number of out of state students who will attend higher education institutions.

ATTACHMENTS

Attachment 1 – Temporary and Proposed rules governing Residency Classification	Page 3
Attachment 2 – HB401	Page 9

STAFF COMMENTS AND RECOMMENDATIONS

The changes to the Temporary Proposed rule brings it in to alignment with the statute changes and primarily state what additional factors a student must prove in establishing residency.

Staff recommends approval of the Temporary and Proposed rules Governing Residency Classification. IDAPA 08.01.04.

BOARD ACTION

A motion to approve the Temporary and Proposed rule governing Residency Classification, IDAPA 08.01.04. effective August 1, 2008.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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IDAPA 08
TITLE 01
CHAPTER 04

08.01.04 - RULES GOVERNING RESIDENCY CLASSIFICATION
THE STATE BOARD OF EDUCATION

000. LEGAL AUTHORITY.

This chapter is adopted under the legal authority of Section 33-3717B, Idaho Code.

(1-1-94) (8-1-08)T

001. TITLE AND SCOPE.

The title of this chapter is Residency. This chapter has the following scope: the four-year institutions under the supervision of the State Board of Education and the Regents of the University of Idaho, the University of Idaho, Boise State University, Idaho State University, and Lewis-Clark State College are required to make residency determinations pursuant to Section 33-3717B, Idaho Code, and these rules.

(1-1-94) (8-1-08)T

002. WRITTEN INTERPRETATIONS -- AGENCY GUIDELINES.

Written interpretations to these rules in the form of explanatory comments are available from the Office of the State Board of Education, 650 West State Street, Room 307, Boise, Idaho 83720.

(1-1-94)

003. ADMINISTRATIVE APPEALS.

Provisions for appeal of a residency determination are set forth in Section 103 of this chapter.

(1-1-94)

004. PUBLIC RECORDS ACT COMPLIANCE.

All rules required to be adopted by this chapter are public records.

(1-1-94)

005. DEFINITIONS.

01. Resident Student. Resident student is defined in Section 33-3717B, Idaho Code, and specifically includes:

(1-1-94) (8-1-08)T

a. Any student who has one (1) or more parent or parents or court appointed guardians who are domiciled in the state of Idaho for at least ~~one (1) year~~ twelve (12) months prior to the opening day of the term for which the student matriculates, and the parent or parents or guardians provide at least fifty percent (50%) of the student's support.

(8-1-08)T

b. Any student who receives less than fifty percent (50%) of his support from a parent, parents, or legal guardians ~~who are not residents of Idaho for voting purposes and which student who~~ has continuously resided and maintained a bona fide domicile in the state for twelve (12) months immediately preceding the opening day of the term during which the student proposes to attend ~~and who has in fact established a bona fide domicile in the state of Idaho~~ primarily for purposes other than educational.

(1-1-94) (8-1-08)T

c. Unless disqualified as a nonresident student as defined in Subsection 005.02, any student who is a graduate of an accredited secondary school in the state of Idaho and who matriculates during the term immediately following such graduation.

(1-1-94)

d. The spouse of a person who is classified or is eligible for classification as a resident of the state for purposes of attending a college or university, provided that the institution shall require the filing of proof of marriage by the applicant.

(1-1-94)

e. A member of the armed forces of the United States stationed in the state on military orders.

(1-1-94)

f. An officer or an enlisted member of the Idaho national guard.

(8-1-08)T

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fg. A student whose parent or guardian is a member of the armed forces and stationed in the state on military orders and who receives fifty percent (50%) or more of his support from a parent or guardian, provided that the student, while in continuous attendance, shall not lose residency status when the student's parent or guardian is transferred on military orders. (1-1-94)

gh. A person separated, under honorable conditions, from the United States armed forces after at least two (2) years of service, who at the time of separation designates the state of Idaho as his intended domicile or who has Idaho as the home of record in service and enters a college or university in the state within one (1) year of the date of separation. (1-1-94)

hi. Any person who has been domiciled in the state, has qualified and would otherwise be qualified under Section 33-3717B, Idaho Code, and who is away from the state for a period of less than ~~one (1) calendar year~~ thirty (30) months and has not established legal residence elsewhere, provided a twelve (12) month period of continuous residence has been established immediately prior to departure. ~~(1-1-94)~~ (8-1-08)T

j. A student who is a member of any of the following Idaho Native American Indian tribes, regardless of current domicile, shall be considered an Idaho state resident for purposes of fees or tuition at institutions of higher education: members of the following Idaho Native American Indian tribes, whose traditional and customary tribal boundaries included portions of the state of Idaho, or whose Indian tribe was granted reserved lands within the state of Idaho: (8-1-08)T

<u>(i)</u>	<u>Coeur d'Alene tribe;</u>	<u>(8-1-08)T</u>
<u>(ii)</u>	<u>Shoshone-Paiute tribes;</u>	<u>(8-1-08)T</u>
<u>(iii)</u>	<u>Nez Perce tribe;</u>	<u>(8-1-08)T</u>
<u>(iv)</u>	<u>Shoshone-Bannock tribes;</u>	<u>(8-1-08)T</u>
<u>(v)</u>	<u>Kootenai tribe.</u>	<u>(8-1-08)T</u>

02. Nonresident Student. Nonresident student is defined in Section 33-3717B, Idaho Code, and includes: (1-1-94) (8-1-08)T

a. A student who does not qualify as a resident student as defined in Subsection 005.01. (1-1-94)

b. A student attending an institution in this state with financial assistance provided by another state or governmental entity thereof, such nonresidency continuing for one (1) year after the completion of the semester for which such assistance is last provided. (1-1-94)

c. A person who is not a citizen of the United States of America, who does not have permanent or temporary resident status or who does not hold "refugee-parolee" or "conditional entrant" status with the United States Immigration and Naturalization Service, or is not otherwise permanently residing in the United States under color of law, and who does not also comply with and meet all applicable sections of Section 33-3717B, Idaho Code, and this chapter. ~~(1-1-94)~~ (8-1-08)T

03. Continuously Resided. The term "continuously resided" as used in this chapter means physical presence in the state for twelve (12) consecutive months. Absence from the state for normal vacations, family travel, work assignments, short-term military training, and similar occasions totaling not more than thirty (30) days during the twelve (12) month qualifying period, in and of itself, will not be regarded as negating the continuous residence of the individual. (1-1-94)

04. Continuous Attendance. For purposes of Subsection 005.01.fg, "continuous attendance" means attendance at a college or university for continuing and succeeding semesters or terms excluding summer semesters or terms. ~~(1-1-94)~~ (8-1-08)T

05. Accredited Secondary School. "Accredited secondary school" means an Idaho secondary school accredited by the State Board of Education. (1-1-94)

06. Term Immediately Following Graduation. For purposes of Subsection 005.01.c. "the term

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immediately following graduation” does not include the summer semester or term of a college or university. (1-1-94)

07. Armed Forces. “Armed forces” means the United States Army, Navy, Air Force, Marine Corps, and United States Coast Guard. It does not include the National Guard or other reserve force. (3-30-01)

08. Domicile. “Domicile” means an individual’s true, fixed, and permanent home and place of habitation; the place where the individual intends to remain and to which the individual expects to return when he leaves without intending to establish a new domicile elsewhere. The establishment of domicile in Idaho occurs when a person is physically present in Idaho primarily for purposes other than educational and can show satisfactory proof that such person is without a present intention to return to another state or acquire a domicile at some other place outside the state and the person has met any other applicable requirements of this chapter. (1-1-94)

09. Support. “Support” means financial support given to the student during the twelve (12) months preceding the opening date of the term for which resident status is requested. Any student who receives less than fifty percent (50%) support may demonstrate this by showing that he is not claimed as a dependent by a parent or guardian for income tax purposes or that a parent or guardian provides less than fifty percent (50%) of the cost of attending an institution according to the financial aid office of that institution or that other similar evidence exists of parental support such as dental bills, medical bills, etc. (1-1-94)

006. -- 099. (RESERVED).

100. RESIDENT CLASSIFICATION BY ALL INSTITUTIONS.

Any student classified as a resident for purposes of higher education by one institution must be considered a resident by all other institutions. “Institutions” means the University of Idaho, Idaho State University, Boise State University, ~~and~~ Lewis-Clark State College, and Eastern Idaho Technical College. (7-1-93) (8-1-08)T

101. RESIDENCY CLASSIFICATION PROCESS.

Each institution is to develop its own procedures to determine residency status of applicants, disseminate information about the classification process, and determine the documentation required of each applicant to the institution. The institution may require whatever records, documents, or affidavits it deems necessary to classify each applicant correctly. It is the responsibility of the institution to notify the student in a timely manner of the documentation required for the classification process, and it is the responsibility of the student to provide the documentation by the deadline established by the institution. Each student must be notified in writing of the residency classification decision made by the institutional personnel responsible for determining residency status. (7-1-93)

102. FACTORS FOR DETERMINING DOMICILE.

Pursuant to Section 33-3717B, Idaho Code, the overriding factor for determining whether a student is a “resident student” is domicile. For these purposes, the establishment of domicile in Idaho occurs when a person is physically present in Idaho primarily for purposes other than educational and can show satisfactory proof that such person is without a present intention to return to another state or acquire a domicile at some other place outside the state and the person has met any other applicable requirements of this chapter. In determining whether a student is domiciled in Idaho primarily for purposes other than educational, the institutions shall consider the following:(1-1-94) (8-1-08)T

~~**01. Registration and Payment of Idaho Taxes or Fees.** Registration and payment of Idaho taxes or fees on a motor vehicle, mobile home, travel trailer, or other item of personal property for which state registration and the payment of state tax or fee is required. (1-1-94) (8-1-08)T~~

01. Domicile Established. Any of the following, if done for at least twelve (12) months before the term in which the student proposes to enroll as a resident student, proves the establishment and maintenance of domicile in Idaho for purposes other than educational: (8-1-08)T

a. Filing of Idaho state income tax returns covering a period of at least twelve (12) months before the term in which the student proposes to enroll as a resident student. (8-1-08)T

b. Permanent full-time employment or the hourly equivalent thereof in the state of Idaho. (8-1-08)T

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- c. **Ownership by the student of the students living quarters.** (8-1-08)T
- 02. Rebuttable Presumption.** A student who is enrolled for more than eight (8) hours in any semester or quarter during a twelve (12) month period shall be presumed to be in Idaho for primarily educational purposes. Such period of enrollment shall not be counted toward the establishment of a bona fide domicile in the state unless the student proves, in fact, establishment of a bona fide domicile in the state primarily for purposes other than educational. A student who establishes at least five (5) of the seven (7) factors listed in subsection 102.03., if done for a least twelve (12) months before the term in which the student proposes to enroll as a resident student, proves the establishment and maintenance of domicile in Idaho for purposes other then educational. (8-1-08)T
- 03. Additional Factors to Determine Domiciliary Intent.** A student who establishes at least five (5) of the seven (7) following factors, if done for at least twelve (12) months before the term in which the student proposes to enroll as a resident student, proves the establishment and maintenance of domicile in Idaho for purposes other than educational: (8-1-08)T
- a. **Registration and Payment of Idaho Taxes or Fees.** Registration and payment of Idaho taxes or fees on a motor vehicle, mobile home, travel trailer, or other item of personal property for which state registration and the payment of state tax or fee is required. (8-1-08)T
- ~~**02. Filing of Idaho State Income Tax Returns.** (1-1-94) (8-1-08)T~~
- ~~**03. Employment.** Permanent full time employment or the hourly equivalent thereof in the state of Idaho. (1-1-94) (8-1-08)T~~
- 04b. Registration to Vote.** Registration to vote for state elected officials in Idaho at a general election. (1-1-94)
- ~~**05. Real Property Ownership in Idaho.** (1-1-94) (8-1-08)T~~
- ~~**06c. Holding of an Idaho Driver's License.** An Idaho state-issued ID card may be used in lieu of an Idaho driver's license. (1-1-94) (8-1-08)T~~
- 07d. Evidence of the Abandonment of a Previous Domicile.** (1-1-94)
- 08e. The Presence of Household Goods in Idaho.** (1-1-94)
- 09f. The Establishment of Accounts With ~~Idaho~~ Financial Institutions in Idaho.** (1-1-94)
- 10. And Other Similar Factors Indicating Intent to be Domiciled in Idaho and the Maintenance of Such Domicile.** Factors may include, but are not limited to, enrollment of dependent children in Idaho primary or secondary schools, establishment of acceptance of an offer of permanent employment for self in Idaho, or documented need to care for a relative in Idaho. (1-1-94)(8-1-08)T

103. APPEALS PROCEDURE.

Any student who contests the residency classification decision made pursuant to IDAPA 08.01.04.101 may appeal the decision. The student must be informed of his right to appeal, must request the appeal in writing and agree to the release of information to the review body, and must comply with deadlines established by the institution for requesting such appeal. (1-1-94)

01. Internal Appeal. The chief executive officer of each institution or his designee must appoint or cause to be appointed a committee of three (3) to five (5) members who represent faculty and administration and who will constitute a residency review committee. The individual responsible for the initial determination of residency of any student is ineligible for membership on the review committee. The committee will elect a chairman, secretary, or other position as may be deemed necessary to carry out the work of the committee. Within thirty (30) days following receipt of the student's written request to appeal the decision made pursuant to IDAPA

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08.01.04.101, the committee must meet and review the ruling. The student appealing is responsible for presenting such evidence as the committee may request and such other evidence as the student may deem pertinent to his residency status. The individual who made the initial residency classification decision pursuant to IDAPA 08.01.04.101 may be present to submit such information as he may desire for each case being appealed. The student must be notified in writing of the review committee's decision. The decision of the committee is final unless the student elects to appeal further to the Board. (7-1-93)

02. Board Appeal. Any student who contests the decision of the review committee may appeal to the Board. In such case, the student must advise the chief executive officer of the institution, in writing, of his request to submit an appeal. The chief executive officer must arrange for a review by the Board or the Board's designated representatives. The decision of the Board is final and binding on all parties concerned. (7-1-93)

104. INTERPRETATIONS RELATING TO RESIDENCY CLASSIFICATION.

01. Common Law Marriage. Any student who wants to establish residency on the basis of a common law marriage must complete an Affidavit of Common Law Marriage as approved by the Board. (7-1-93)

02. Nonresident Aliens -- Marital Privilege. Nonresident aliens who marry Idaho residents become eligible for residency classification for purposes of higher education, as provided in Section 33-3717B, Idaho Code, upon filing proof of marriage in the admissions office. However, the institutions remain responsible for complying with requirements set forth in regulations of the U.S. Immigration and Naturalization Service relating to non-immigrant alien students until such time as the alien is granted lawful resident alien status by the U.S. Immigration and Naturalization Service. (7-1-93) (8-1-08)T

105. RESIDENCY REQUIREMENTS FOR SPECIAL GRADUATE OR PROFESSIONAL PROGRAMS.

As provided in Section 33-3717B, Idaho Code, a residency requirement of at least one (1) calendar year is in effect for certain special graduate and professional programs. Those programs include, but are not limited to, the WAMI Regional Medical Program, the WICHE Professional Student Exchange Program, the Idaho Dental Education Program, the Creighton Dental Education Program, the WOI Regional Veterinary Program, and the University of Utah Medical Program. For purposes of this section, the requirement of "at least one (1) calendar year" means a period of twelve (12) consecutive months of continuous residency consistent with the requirements of Section 33-3717B, Idaho Code, immediately prior to the date of application. (1-1-94) (8-1-08)T

01. Delegation of Certification Administration. The following office or institutions are delegated the responsibility for the evaluation of applicants and determination of residency for the special graduate and professional programs for purposes of certification. (7-1-93)

- a. The University of Idaho -- WAMI Regional Medical Program, WOI Regional Veterinary Program. (7-1-93)
- b. Idaho State University -- Idaho Dental Education Program and the University of Utah Medical Program. (6-30-95)
- c. Office of the State Board of Education -- WICHE Professional Student Exchange Program. (6-30-95)

02. Appeal to the State Board of Education. Applicants for the special graduate and professional programs, upon institutional denial of residency status, may petition the Board for a hearing on the denial. The decision to grant such a hearing is discretionary with the Board and will be granted for errors in determination of residency pursuant to Section 33-3717B, Idaho Code. (1-1-94) (8-1-08)T

106. -- 999. (RESERVED).

]]]] LEGISLATURE OF THE STATE OF IDAHO]]]]
 Fifty-ninth Legislature Second Regular Session - 2008

HOUSE BILL NO. 401

1 AN ACT
2 RELATING TO PUBLIC INSTITUTIONS OF HIGHER EDUCATION; AMENDING SECTION
3 33-3717B, IDAHO CODE, TO REVISE DEFINITIONS, TO PROVIDE A PRESUMPTION FOR
4 BEING IN IDAHO PRIMARILY FOR EDUCATIONAL PURPOSES AND TO PROVIDE THAT A
5 CERTAIN PERIOD OF ENROLLMENT DOES NOT COUNT TOWARD THE ESTABLISHMENT OF
6 BONA FIDE DOMICILE IN IDAHO UNLESS THE STUDENT PROVES CERTAIN SPECIFIED
7 FACTORS.

9 SECTION 1. That Section 33-3717B, Idaho Code, be, and the same is hereby
10 amended to read as follows:

(a) Any student who has one (1) or more parent or parents or court-appointed guardians who are domiciled in the state of Idaho, and the parent, parents or guardians provide at least fifty percent (50%) of the student's support. Domicile, ~~in the case of a parent or guardian as used in this section,~~ means that individual's true, fixed and permanent home and place of habitation. It is the place where that individual intends to remain, and to which that individual expects to return when that individual leaves without intending to establish a new domicile elsewhere. To qualify under this section, the parent, parents or guardians must have maintained a bona fide domicile in the state of Idaho for at least ~~one (1) year~~ twelve (12) months prior to the opening day of the term for which the student matriculates.

(b) Any student, who receives less than fifty percent (50%) of the student's support from a parent, parents or legal guardians and who ~~are not residents of this state for voting purposes, but which student~~ has continuously resided and maintained a bona fide domicile in the state of Idaho primarily for purposes other than educational for twelve (12) months next preceding the opening day of the term during which the student proposes to attend the college or university. ~~and who has in fact established a bona fide domicile in this state primarily for purposes other than educational.~~

(c) Subject to subsection (2) of this section, any student who is a graduate of an accredited secondary school in the state of Idaho, and who matriculates at a college or university in the state of Idaho during the term immediately following such graduation regardless of the residence of the student's parent or guardian.

(d) The spouse of a person who is classified, or is eligible for classification, as a resident of the state of Idaho for the purposes of attending a college or university.

42 (e) A member of the armed forces of the United States, stationed in the
43 state of Idaho on military orders.

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3 fifty percent (50%) or more of support from parents or legal guardians.
4 The student, while in continuous attendance, shall not lose that residence
5 when the student's parent or guardian is transferred on military orders.
6 (g) A person separated, under honorable conditions, from the United
7 States armed forces after at least two (2) years of service, who at the
8 time of separation designates the state of Idaho as his intended domicile
9 or who has Idaho as the home of record in service and enters a college or
10 university in the state of Idaho within one (1) year of the date of separation.
11

12 (h) Any individual who has been domiciled in the state of Idaho, has
13 qualified and would otherwise be qualified under the provisions of this
14 statute and who is away from the state for a period of less than ~~one (1) calendar year~~
15 thirty (30) months and has not established legal residence
16 elsewhere provided a twelve (12) month period of continuous residence has
17 been established immediately prior to departure.

18 (i) A student who is a member of any of the following Idaho Native American
19 Indian tribes, regardless of current domicile, shall be considered an
20 Idaho state resident for purposes of fees or tuition at institutions of
21 higher education: members of the following Idaho Native American Indian
22 tribes, whose traditional and customary tribal boundaries included portions
23 of the state of Idaho, or whose Indian tribe was granted reserved
24 lands within the state of Idaho: (i) Coeur d'Alene tribe; (ii) Shoshone-Paiute
25 tribes; (iii) Nez Perce tribe; (iv) Shoshone-Bannock tribes; (v)
26 Kootenai tribe.

27 (2) A "nonresident student" shall mean any student who does not qualify
28 as a "resident student" under the provisions of subsection (1) of this section,
29 and shall include:

30 (a) A student attending an institution in this state with the aid of
31 financial assistance provided by another state or governmental unit or
32 agency thereof, such nonresidency continuing for one (1) year after the
33 completion of the semester for which such assistance is last provided.

34 (b) A person who is not a citizen of the United States of America, who
35 does not have permanent or temporary resident status or does not hold
36 "refugee-parolee" or "conditional entrant" status with the United States
37 immigration and naturalization service or is not otherwise permanently
38 residing in the United States under color of the law and who does not also
39 meet and comply with all applicable requirements of this section.

40 (3) The establishment of a new domicile in Idaho by a person formerly
41 domiciled in another state has occurred if such person is physically present
42 in Idaho primarily for purposes other than educational and can show satisfactory
43 proof that such person is without a present intention to return to such
44 other state or to acquire a domicile at some other place outside of Idaho. A
45 student who is enrolled for more than eight (8) hours in any semester or quarter
46 during a twelve (12) month period shall be presumed to be in Idaho for
47 primarily educational purposes. Such period of enrollment shall not be counted
48 toward the establishment of a bona fide domicile in this state unless the student
49 proves, in fact, establishment of a bona fide domicile in this state primarily
50 for purposes other than educational. Institutions determining whether a
51 student is domiciled in the state of Idaho primarily for purposes other than
52 educational shall consider, but shall not be limited to, the following factors:
53

54 (a) ~~Registration and payment of Idaho taxes or fees on a motor vehicle,~~
55 ~~mobile home, travel trailer, or other item of personal property for which~~

3

1 ~~state registration and the payment of a state tax or fee is required. Any~~
2 ~~of the following, if done for at least twelve (12) months before the term~~
3 ~~in which the student proposes to enroll as a resident student, proves the~~
4 ~~establishment and maintenance of domicile in Idaho for purposes other than~~
5 ~~educational and supports classification of a student as an Idaho resident:~~

6 (b) Filing of Idaho state income tax returns covering a period of
7 at least twelve (12) months before the term in which the student pro-

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8 poses to enroll as a resident student;

9 (ei) Permanent full-time employment or the hourly equivalent
10 thereof in the state of Idaho; or

11 (iii) Ownership by the student of the student's living quarters.

12 (b) The following, if done for at least twelve (12) months before the
13 term in which the student proposes to enroll as a resident student, lend
14 support to domiciliary intent and the absence of which indicates a lack of
15 domiciliary intent. By themselves, the following do not constitute suffi-
16 cient evidence of the establishment and maintenance of a domicile in Idaho
17 for purposes other than educational:

18 (i) Registration and payment of Idaho taxes or fees on a motor
19 vehicle, mobile home, travel trailer or other item of personal prop-
20 erty for which state registration and the payment of a state tax or
21 fee is required;

22 (ii) Registration to vote for state elected officials in Idaho at a
23 general election;

24 (iii) Holding an Idaho driver's license;

25 (iv) Evidence of abandonment of a previous domicile;

26 (v) Presence of household goods in Idaho;

27 (vi) Establishment of accounts with Idaho financial institutions;
28 and

29 (vii) Other similar factors indicating intent to be domiciled in
30 Idaho and the maintenance of such domicile.

31 (4) The state board of education and the board of regents of the univer-
32 sity of Idaho shall adopt uniform and standard rules applicable to all state
33 colleges and universities now or hereafter established to determine resident
34 status of any student and to establish procedures for review of that status.

35 (5) Appeal from a final determination denying resident status may be ini-
36 tiated by the filing of an action in the district court of the county in which
37 the affected college or university is located; an appeal from the district
38 court shall lie as in all civil actions.

39 (6) Nothing contained herein shall prevent the state board of education
40 and the board of regents of the university of Idaho from establishing quotas,
41 standards for admission, standards for readmission, or other terms and
42 requirements governing persons who are not residents for purposes of higher
43 education.

44 (7) For students who apply for special graduate and professional programs
45 including, but not limited to, the WAMI (Washington, Alaska, Montana, Idaho)
46 regional medical program, the WICHE student exchange programs, Creighton uni-
47 versity school of dental science, the university of Utah college of medicine,
48 and the Washington, Oregon, Idaho (WOI) regional program in veterinary medical
49 education, no applicant shall be certified or otherwise designated as a bene-
50 ficiary of such special program who has not been a resident of the state of
51 Idaho for at least one (1) calendar year previous to the application date.

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SUBJECT

Approval of Proposed Rule Change, Rules Governing Public Charter Schools

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.04 – Section 300, Rules Governing Public Charter Schools

BACKGROUND

Idaho code and the Board's administrative rules governing public charter schools require public charter schools to submit programmatic operations audits to their authorizers on an annual basis.

In its Spring 2007 Virtual Schools Operations report to the legislature, the Office for Performance Evaluations recommended the implementation of additional reporting requirements for virtual schools.

DISCUSSION

Though current statute and administrative rule require the submission of annual programmatic operations audits, they do not provide direction regarding the scope of such audits. As a result, public charter schools submit a wide range of audit reports that may or may not prove valuable for oversight and evaluation of those schools.

The proposed rule would provide a basic list of elements to be included in programmatic operations audits. Additional elements specific to virtual schools would be required of virtual public charter schools. Also, the rule would require that at least two persons outside the immediate stakeholder groups of public charter schools participate in completion of the audits.

IMPACT

The proposed rule, if approved, will define minimum elements for inclusion in the annual programmatic operations audits submitted by public charter schools to their authorizers, helping to ensure the quality of Idaho's public charter schools.

ATTACHMENTS

Attachment 1 – Text of Proposed Rule Change

Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends approval of the proposed rule change.

BOARD ACTION

A motion to approve the proposed rule change to IDAPA 08.02.04.300.03, Rules Governing Public Charter Schools, defining minimum requirements for charter schools' annual programmatic operations audits.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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300. PUBLIC CHARTER SCHOOL RESPONSIBILITIES.

01. General. The governing board of a public charter school shall be responsible for ensuring that the public charter school is adequately staffed, and that such staff provides sufficient oversight over all public charter school operational and educational activities. In addition, the governing board of a public charter school shall be responsible for ensuring compliance with Title 33, Chapter 52, Idaho Code. (4-11-06)

02. Compliance with Terms of Charter. The governing board of a public charter school shall be responsible for ensuring that the school is in compliance with all of the terms and conditions of the charter approved by the authorized chartering entity of the school, as reflected in the final approved petition filed with the Board. In addition, the governing board of the public charter school shall be responsible for ensuring that the school complies with all applicable federal and state education standards, as well as all applicable state and federal laws, rules and regulations, and policies. (4-11-06)

03. Annual Reports. The governing board of a public charter school must submit an annual report to the authorized chartering entity of the school, as required by Section 33-5206(7), Idaho Code. The report shall contain the audit of the fiscal and programmatic operations as required in Section 33-5205(3)(j), Idaho Code, a report on student progress based on the public charter school's student educational standards identified in Section 33-5205(3)(b), Idaho Code, and a copy of the public charter school's accreditation report. An authorized chartering entity may reasonably request that a public charter school provide additional information to ensure that the public charter school is meeting the terms of its charter. (4-11-06)

a. The annual programmatic operations audit shall be conducted with the substantive input of at least two persons outside the immediate stakeholder group of the public charter school, and shall address at least the following: effectiveness of school governance; fiscal soundness as defined by Section 33-5209(2)(c), Idaho Code; effectiveness of the educational program with supporting evidence; stakeholder satisfaction; and strategic planning.
()

b. Virtual public charter school programmatic operations audits shall also address effectiveness of the learning management system; effectiveness of special service delivery to qualifying students; and frequency and quality of student-teacher interaction.
()

04. Operational Issues. The governing board of the public charter school shall be responsible for promptly notifying its authorized chartering entity if it becomes aware that the public charter school is not operating in compliance with the terms and conditions of its charter. Thereafter, the governing board of the public charter school shall also be responsible for advising its authorized chartering entity with follow-up information as to when, and how, such operational issues are finally resolved and corrected. (4-11-06)

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IDAHO DIVISION OF VOCATIONAL REHABILITATION

SUBJECT

Proposed rule changes to IDAPA 47.01.01 – Clarification of language regarding Field Services Manual and addition of Transparency language

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.F
Idaho Code 33-2211(1)
Idaho Code 67-5229

BACKGROUND

In order to edit superfluous information within the rules document, Idaho Division of Vocational Rehabilitation (IDVR) is proposing changes to IDAPA 47 Title 01 Chapter 01.

There is also a need to ensure the guiding principles and intent of the IDVR service delivery system is accomplished by equal organizational transparency of providers. The proposed change addresses the concern voiced by one set of providers and agency staff regarding another service provider group with less organizational transparency.

DISCUSSION

The reason for modification of the rules was to provide a succinct outline governing our service delivery process.

The purpose of a proposed rule for transparency is to provide transparency of vocational providers, for profit and not-for-profit on an equal footing. Transparency bolsters the assurance of appropriate and quality services for significantly disabled clients served by provider organizations. Presently all not-for-profit providers are required by their status to demonstrate transparency in three key areas that are not required of for profit providers identified as community rehabilitation programs (CRP). These elements include the use of a voluntary board for advice and guidance of the organizational services to IDVR clients, publicly disclosed audit information on an annual basis, and publishing the salary of the CRP CEO. Not only is the requirement of transparency required of the not-for-profit CRPs, but it is also standard operating procedure for IDVR and related state agencies in Idaho and other states working with disability populations.

Cost Considerations:

There would be no additional financial obligations to the state. Of the three elements the only one with a cost issue is the audit information. Smaller organizations that are providers use an accounting procedure of a compilation generally costing about \$700 that easily satisfies the transparency concerns. If

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this issue is considered too onerous, an accounting process of every two years may well suffice. At the present time less than 20 CRP providers do not meet the proposed transparency criteria.

IMPACT

The abbreviation of rules will achieve clarity by providing key reference citations for greater regulatory detail. The impact of the IDVR Proposed Rule for Transparency is to provide appropriate and quality services for significantly disabled clients served by equivalent provider organizations. There will be no financial impact to the agency from any of these proposed rules.

ATTACHMENTS

Attachment 1 – IDAPA 47 Title 01 Chapter 01	page 3
Attachment 2 – Transparency for IDVR Providers	page 9
Attachment 3 – Field Service Manual (Incorporated by reference)	page 13
Attachment 4 – Federal State Vocation Rehabilitation Plan (Incorporated by reference)	page 139

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming Pending rules. Based on received comments and Board direction changes may be made to Proposed rules prior to entering the Pending stage. All Pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for submittal.

Staff recommends approval of the proposed rule change to IDAPA 47.01.01. The requirement of transparency for both not-for-profit and for profit providers helps protect a often disadvantage portion of Idaho citizens.

BOARD ACTION

A motion to approve the proposed rule change to IDAPA 47.01.01 clarifying language regarding the Field Service Manual and adding requirements for provider transparency.

Moved by _____ Seconded by _____ Carried Yes ____ No ____

IDAPA 47 TITLE 01 CHAPTER 01
IDAPA 47 - DIVISION OF VOCATIONAL REHABILITATION
47.01.01 - RULES OF THE IDAHO DIVISION OF VOCATIONAL REHABILITATION

000. LEGAL AUTHORITY.

Section 33-2301, Idaho Code and the Rehabilitation Act of 1973 and all subsequent Amendments. (3-30-01)

001. TITLE AND SCOPE.

01. Title. The title of this chapter is IDAPA 47.01.01, "Rules of the Idaho Division of Vocational Rehabilitation". (5-3-03)

02. Scope. The chapter has the following scope: To streamline the existing rules and to implement program changes necessitated by the 1998 Amendments of the Rehabilitation Act of 1973. (4-5-00)

002. WRITTEN INTERPRETATIONS.

Written interpretations to these rules in the form of the explanatory comments accompanying the notice of proposed rulemaking ~~that originally proposed the rules~~ are available from the Idaho Division of Vocational Rehabilitation, 650 W. State Street, Boise, Idaho 83720. Field Services Manual and other agency guidance documents, as well as agency policy statements or interpretations not rising to the legal effect of a rule, if any, are available for inspection and replication at the agency Central Office during regular business hours. (4-5-00)()

003. ADMINISTRATIVE APPEALS.

~~This chapter does not provide for appeal of the administrative requirements for agencies.~~ Administrative appeals shall be governed by Section 100 of these rules in accordance with 34 CFR Part 361.57 (4-5-00)()

004. INCORPORATION BY REFERENCE.

01. General. Unless provided otherwise, any reference in these rules to any document identified in Subsection 004 shall constitute the full incorporation into these rules of that document for the purposes of the reference, including any notes and appendices therein. The term "documents" includes codes, standards or rules which have been adopted by an agency of the state or of the United States or by any nationally recognized organization or association. (3-30-01)

02. Availability Of Reference Material. Copies of the documents incorporated by reference into these rules are available at the following location or through access to the internet URL addresses outlined in section 004.03 below.: (3-30-01)()

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a. Central Office, Idaho Division of Vocational Rehabilitation, 650 W. State Street, Room 150, Boise, Idaho 83720, (208) 334-3390. (3-30-01)

~~b. Regional Offices, Idaho Division of Vocational Rehabilitation, located at:~~
~~(3-30-01) ()~~

i. ~~1010 Ironwood Drive, Suite 101, Coeur d'Alene, Idaho 83814, (208) 769-1441.~~
~~(3-30-01) ()~~

ii. ~~1118 F. Street, P.O. Box 1164, Lewiston, Idaho 83501, (208) 799-5070.~~
~~(5-3-03) ()~~

iii. ~~3350 Americana Terrace, Suite 210, Boise, Idaho 83706, (208) 334-3650.~~
~~(5-3-03) ()~~

iv. ~~10200 W. Emerald Street, Suite 101, Boise, Idaho 83704, (208) 327-7411.~~
~~(3-30-01) ()~~

v. ~~245 3rd Avenue North, Twin Falls, Idaho 83301, (208) 736-2156.~~
~~(3-30-01) ()~~

vi. ~~1070 Hiline, Suite 200, Pocatello, Idaho 83201, (208) 236-6333.~~
~~(3-30-01) ()~~

vii. ~~1825 Hoopes Avenue, Idaho Falls, Idaho 83404, (208) 525-7149.~~
~~(3-30-01) ()~~

viii. ~~3110 E. Cleveland Blvd. #A7, Caldwell, Idaho 83605, (208) 454-7606.~~
~~(5-3-03) ()~~

~~ixb.~~ ~~This~~These documents ~~is~~are also available at ~~the~~ website
<http://www.state.id.us/idvr/idvrhome.htm>. (3-30-01) ()

03. Documents Incorporated By Reference. The following documents are incorporated by reference into these rules: (3-30-01)

a. All federal publications through the Rehabilitation Services Administration. (5-3-03)

b. Idaho Division of Vocational Rehabilitation Field Services Manual, ~~2003—2004~~ 2008 available for review at <http://www.state.id.us/idvr/idvrhome.htm>. (3-20-04) ()

c. Federal State Plan for Vocational Rehabilitation ~~2003—2004.~~ 2008-2010 available for review at <http://www.state.id.us/idvr/idvrhome.htm>. (3-20-04) ()

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- d. Workforce Investment Act, Public Law 105-220. (5-3-03)
- e. Federal Register, Department of Education, 34 CFR Part 361-363. (____)
- f. The Rehabilitation Act of 1973, as amended. ~~1998~~. (3-30-01) (____)

005. -- 009. (RESERVED).

010. DEFINITIONS.

- 01. Authorization To Purchase.** A purchase order issued on behalf of the Division (5-3-03)
- 02. CFR.** Code of Federal Regulations. (7-1-93)
- 03. Client/Participant.** Any individual who has applied for or is eligible for Vocational Rehabilitation services. (5-3-03)
- 04. Designated State Agency.** The Idaho State Board of Education. (5-3-03)
- 05. Designated State Unit.** The Idaho Division of Vocational Rehabilitation. (7-1-93)
- 06. IDVR.** The Idaho Division of Vocational Rehabilitation. (4-5-00)
- 07. IPE.** Individualized Plan for Employment. (4-5-00)
- 08. Most Significant Disability (MSD).** Meets the criteria as Significant Disability as found in the Rehabilitation Act of 1973, as amended, and defined in 34CFR Part 361.5 (b) 30 and is further defined as: (5-3-03) (____)
 - a. Having a severe physical, mental, cognitive or sensory impairment which seriously limits two (2) or more functional capacities (such as mobility, communication, self-care, self-direction, interpersonal skills, work tolerance or work skills) in terms of an employment outcome; and (5-3-03)
 - b. Whose vocational rehabilitation can be expected to require multiple vocational rehabilitation services over an extended period of time. (3-20-04)
- 09. Method Of Written Notification.** The written notification of findings and conclusions arising from an Informal Dispute Resolution, Mediation, Impartial Due Process Hearing, shall be served to the client via the U.S. Postal Service by means of certified mail. Durational requirements for appeals shall commence on the day received by the client as noted by the certified mail records. (5-3-03)
- 10. PM.** Policy Memorandum. (5-3-03)

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11. **RSA.** Rehabilitation Services Administration, U.S. Department of Education. (5-3-03)

12. **State Administrator.** The Chief Executive Officer of the Idaho Division of Vocational Rehabilitation. (4-5-00)

13. **VRC.** Vocational Rehabilitation Counselor. (5-3-03)

14. ~~**Vocational Rehabilitation Services.** Services that reduce the impact of functional limitations on the ability to achieve an employment outcome. (3-20-04) ()~~

011. -- 099. (RESERVED).

100. CLIENT/PARTICIPANT APPEALS.

The client appeals process shall be governed by Section 100 of these rules in accordance with 34 CFR Part 361.57 and is incorporated within the rules by reference to the agency Field Services Manual 2008. See <http://www.state.id.us/idvr/idvrhome.htm>. ()

~~**01. Informal Dispute Resolution.** Within ten (10) calendar days of notification of the contested action, lack of action or decision, the client/participant may request that an Informal Dispute Resolution be held. The request shall be made in writing to the Regional Manager. The written request should state the reason for the review. (5-3-03) ()~~

~~**a.** The Regional Manager shall inform the client/participant in writing as to the time, place, and date of the Informal Dispute Resolution. The client/participant may choose to represent himself/herself or may have a representative(s) speak on his/her behalf. (5-3-03) ()~~

~~**b.** The Regional Manager will make a decision regarding the specifics of the Informal Dispute Resolution. This decision will be in written form and it will be sent to the client/participant, with a copy in the case file. (5-3-03) ()~~

~~**02. Mediation.** The request shall be made in writing to the Regional Manager. A written request should state the reason for the review. The Mediation must take place within the sixty (60) day requirement for an Impartial Due Process Hearing. (5-3-03) ()~~

~~**03. Impartial Due Process Hearing.** An Impartial Due Process Hearing can be held without an Informal Dispute Resolution or Mediation or if the client/participant is dissatisfied with the result of the Informal Dispute Resolution or Mediation. The Impartial Due Process Hearing will deal with the issues involved in the original Informal Dispute Resolution or Mediation, if one took place. The request for an Impartial Due Process Hearing will be made in writing to the Administrator of the Division within ten (10) calendar days of the Regional Manager's decision from the Informal Dispute Resolution~~

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~~or the Mediation Agreement from Mediation. The hearing by an impartial hearing officer must be held within sixty (60) days of a request by the client unless both parties agree to a specified delay. (5-3-03) ()~~

101. -- 199. (RESERVED).

200. ORDER OF SELECTION.

01. Order Of Selection. The following order of selection will be used if the Idaho Division of Vocational Rehabilitation finds that it cannot serve all eligible clients/participants due to a lack of either personnel and/or financial resources. The priority listings progress downward with priority number one (1) being the most restrictive and priority number four (4) being the least restrictive. (5-3-03)

a. Priority Number 1: At the time that a decision to move to an order of selection is made, it is determined that only those consumers who already have an existing individualized plan for employment (IPE) will continue to be served. (5-3-03)

b. Priority Number 2: At the time that a decision to move to an order of selection is made, it is determined that only those consumers in Priority Number 1 above and current and future, otherwise eligible, clients/ participants rated to this or a more restrictive priority can be served. Consumers meeting this priority rating are those individuals with most significant disabilities. (5-3-03)

c. Priority Number 3: At the time that a decision to move to an order of selection is made, it is determined that only those consumers in Priorities Numbers 1 and 2 above and current and future, otherwise eligible, clients/participants rated to this or a more restrictive priority can be served. Consumers meeting this priority rating are those individuals with significant disabilities. (5-3-03)

d. Priority Number 4: All eligible clients/participants for Vocational Rehabilitation services (no order of selection in place). (5-3-03)

201. -- 299. (RESERVED)

300. CLIENT/PARTICIPANT SERVICES.

01. Provision of Purchased Services Contingent Upon Financial Need Of The Client/Participant. The Idaho Division of Vocational Rehabilitation will apply a Financial Needs Assessment. Financial need will not be a consideration in the determination of eligibility for Vocational Rehabilitation, but will be a consideration in allocating the cost of VR services, with some exceptions. (5-3-03)

02. Authorization To Purchase. The Division requires that when purchasing services from a vendor, an authorization must be issued prior to, or on, the beginning

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date of service. If services are provided without a Division approved authorization to purchase, the Division reserves the right to not honor the vendor's invoice. (5-3-03)

03. General Provisions. Idaho Division of Vocational Rehabilitation will only pay for services that contribute to the determination of eligibility or to achieve an employment outcome. (3-20-04)

04. Non-Residents Of The State. Financial participation will only be available to residents of Idaho. Citizenship is not a requisite for financial assistance; however, the individual must have legal resident status and be present in the state (i.e., illegal aliens will not be eligible for the Vocational Rehabilitation programs). (3-20-04)

05. Provision Of CRP (Community Rehabilitation Program) Services. IDVR will purchase vocational services from CRPs that are accredited by either CARF, the Rehabilitation Accreditation Commission, or Rehabilitation Services Accreditation System (RSAS). In conjunction with the client/participant, the qualified professional Vocational Rehabilitation counselor will determine which CRP Services, if any, are required for the client/participant to achieve an employment outcome. (3-20-04)

301. TRANSPARENCY.

To provide transparency of vocational providers, for profit and not-for-profit, on an equal footing, all vocational providers shall: ()

- a. Use a voluntary board for advice and guidance of the organizational services to IDVR clients. ()
- b. Publicly disclose audit information on an annual basis. ()
- c. Annually publishing of the salary of the CRP CEO. ()

301-302. -- 999.

(RESERVED).

Transparency for IDVR Providers

I. Introduction

The Idaho Division of Vocational Rehabilitation (IDVR) has a federally mandated responsibility to assist qualified individuals with disabilities to obtain employment. Much of this obligation is fulfilled by IDVR counselors who are based in Regional offices throughout the State. In addition, IDVR enters into agreements with community based organizations to assist in implementing the rehabilitation plans developed by the IDVR clients and counselors. Typically, these individuals have severe disabilities and require a more labor intensive level of service than IDVR counselors are able to provide given their high caseload size.

II. Community Providers

Currently, there are two types of Community Providers that have written agreements with IDVR. The first are private, “not for profit” organizations that were founded by volunteers to meet specific needs identified by their communities. The second are private “for profit” corporations, frequently established by former employees of “not for profit” organizations. The emergence of “for profit” providers of services to IDVR is a relatively new phenomenon and gives rise to issues that require thoughtful consideration and responses to ensure the guiding principles and intent of the IDVR service delivery system are adhered to. The origins of potential concerns are found in the essential and fundamental differences between the two types of Community Providers.

Business Model

Upon their establishment as corporations, both entities must choose how to incorporate i.e. as a “for profit” enterprise or a “not for profit” organization. This is a critical choice that indicates the motives for existing and to a great degree the amount of accountability and transparency that is applied to the use of public funds and trust.

By filing as a “for profit” corporation, the owners are legally declaring their intent to make a profit for their owners and/or investors. In fact, it is the first obligation of the “for profit” corporation to produce a return on investment to its shareholders.

In contrast, “not for profit” organizations are mission driven and must be operated for charitable purposes that address a specific public need that is approved by state and local governments. Typically, “not for profits” are well known and have served their communities for decades. Any excess revenues they produce are required by law to be applied to further the mission of the organization.

Governance

Compared to their “not for profit” counterparts, “for profits” have minimal public disclosure requirements and different governance and reporting rules, which minimize public oversight and transparency. They must hold annual meetings, keep minutes, and file tax returns. Boards of directors have a legal obligation to shareholders to maximize returns, and owners equally expect a financial return on investments.

This is in stark contrast to the governance of the “not for profit” sector. These organizations are governed by a volunteer board of directors who represent the various interests of their community. By law, they can not receive remuneration from their position and are obligated to make decisions intended to further the mission of the organization. Typically, boards of directors’ meetings are held in public where stakeholders may observe the decision-making and policy setting processes.

Financial Oversight

The historic origins of the two types of entities have influenced the financial oversight under which they must operate. Traditionally, “for profits” have focused on the private sector raising monies from investors and reporting their fiscal activities only to their investors and government entities in relation to wages and taxes. Oversight in for-profit corporations is non-transparent; indeed, meetings are typically closed to non-directors and information, such as particulars of business plans, legally withheld from the outside. In short, the key difference is that the duty of a for-profit corporation is to its shareholders/owners, not to the public or any sector of the community it may serve by its services or products (as is the case with nonprofits).

Historically “not for profits” have been entrusted with public funds, therefore there are extensive controls and transparency requirements in place to ensure taxpayers dollars are being used appropriately. “Not for profits” routinely obtain annual independent audits that are shared with the public and executive compensation is a matter of public record. Boards of Directors receive fiscal reports and have a fiduciary responsibility for public funds.

III. Need for Transparency

The emergence of the “for profit” sector in providing public services is relatively new and therefore few fiduciary safeguards and controls are in place. As a result, we usually learn of abuses of the public trust in the headlines of the media. The recent debacles of HealthSouth Rehabilitation, WorldCom, and Enron come immediately to mind. In the wake of these and other scandals, Congress recognized the vital importance of good corporate governance practices when it passed the Sarbanes-Oxley Act in 2002. Many of the principles established in Sarbanes-Oxley are an effort to extend the same transparency to the “for profit sector” that is found in the “not for profit” world. Those essential principles are outlined in the Section IV.

It would be prudent of IDVR to require the same degree of transparency for their “for profit” providers as is required for the “not for profit” sector. The profit motive is a powerful drive that has made capitalism the most robust economic force in the world. It is just that drive that led to the establishment of “not for profits” to address charitable activities and to handle public funds.

Most importantly, is the recognition that IDVR clients are often some of our society’s most vulnerable members. They often require extensive services and people with the most severe disabilities can be time consuming and expensive to place into employment. Safeguards are needed to ensure that the profit motive does not supersede the best interests of the individual clients.

IV. Recommendations for “For Profit” Transparency

The following is a summary of the primary principle contained within the Sarbanes-Oxley Act of 2002 which was created to curb abuse and fraud in public companies in following the scandals of Enron, WorldCom, and others.

- **Principle 1 Role of Board:** The organization’s governing board should oversee the operations of the organization in such manner as will assure effective and ethical management.

- **Principle 2 Importance of Independent Directors:** The independent and non-management board members are an organizational resource that should be used to assure the exercise of independent judgment in key committees and general board decision-making.

Comment: Advisory Boards representing the various stakeholder interests in the community could address Principles 1 & 2.

- **Principle 3 Audit Committee:** An organization with significant financial resources should have an audit committee composed solely of independent directors that should assure the independence of the organization’s financial auditors, review the organization’s critical accounting policies and decisions and the adequacy of its internal control systems, and oversee the accuracy of its financial statements and reports.

Comment: Annual independent audits and making the results public would be consistent with not for profit procedures.

- **Principle 4 Governance and Nominating Committees:** An organization should have one or more committees, composed solely of independent directors, that focus on core governance and board composition issues, including: the governing documents of the organization and the board; the criteria, evaluation, and nomination of directors; the appropriateness of board size, leadership, composition, and committee structure; and codes of ethical conduct.

• **Principle 5 Compensation Committee:** An organization should have a committee composed of independent directors that determines the compensation of the chief executive officer and determines or reviews the compensation of other executive officers, and assures that compensation decisions are tied to the executives' actual performance in meeting predetermined goals and objectives.

Comment: Compensation for "not for profit" CEOs is made public annually.

• **Principle 6 Disclosure and Integrity of Institutional Information:** Disclosures made by an organization regarding its assets, activities, liabilities, and complete, and include all material information. Financial and other information should fairly reflect the condition of the organization, and be presented in a manner that promotes rather than obscures understanding. CEOs and CFOs should be able to certify the accuracy of financial and other disclosures, and the adequacy of their organizations' internal controls.

• **Principle 7 Ethics and Business Conduct Codes:** An organization should adopt and implement ethics and business conduct codes applicable to directors, senior management, agents, and employees that reflect a commitment to operating in the best interests of the organization and in compliance with applicable law, ethical business standards and the organization's governing documents.

• **Principle 8 Executive and Director Compensation:** Executives (and directors if appropriate) should be compensated fairly and in a manner that reflects their contribution to the organization. Such compensation should not include loans, but may include incentives that correspond to success or failure in meeting performance goals.

• **Principle 9 Monitoring Compliance and Investigating Complaints:** An organization should have procedures for receiving, investigating, and taking appropriate action regarding fraud or noncompliance with law or organization policy, and should protect "whistleblowers" against retaliation.

• **Principle 10 Document Destruction and Retention:** An organization should have document retention policies that comply with applicable laws and are implemented in a manner that does not result in the destruction of documents that may be relevant to an actual or anticipated legal proceeding or governmental investigation.



Field Services Policy Manual



*Idaho Division of
Vocational Rehabilitation*

Updated as of January 2008
(created January 2007)

IDAHO DIVISION OF VOCATIONAL REHABILITATION

FIELD SERVICES POLICY MANUAL (update to index 1/23/08)

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SECTION 1.0 - PURPOSE AND GENERAL REQUIREMENTS OF THE IDAHO VOCATIONAL REHABILITATION PARTICIPANT SERVICES PROGRAM

The Idaho Division of Vocational Rehabilitation (IDVR) program assists eligible persons with physical or mental disabilities to prepare for and achieve an employment outcome. "Employment outcome" means entering or retaining full-time, or if appropriate, part-time competitive employment in the integrated labor market to the greatest extent possible. It also means supported employment; or other types of employment, including self employment, consistent with self sustaining activity for wages or compensation consistent with an individual's strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice.

Competitive employment is work performed in the integrated labor market in which the individual is compensated at or above minimum wage, but not less than the customary wage and benefits paid for the same or similar work performed by individuals who do not have a disability.

The IDVR is a statewide program that develops and utilizes partnerships for effective service delivery. Partnerships vary, but include those programs authorized under the Rehabilitation Act such as Independent Living Centers and Tribal Vocational Rehabilitation Programs. Programs authorized under the Workforce Investment Act (WIA) are utilized to the maximum extent possible as allowed in Section .188 of the Act. It is understood that each program is unique and offers unique cultural and professional expertise. Cooperative Agreements with respective programs are encouraged and should be referred to for local understanding. Staff is encouraged to understand these agreements and provide information, referral and services as appropriate to the needs of the individuals they serve. Consult with the Regional Manager for access to pertinent cooperative agreements.

Vocational Rehabilitation is based upon an Individual Plan of Employment (IPE) that is oriented to the achievement of an employment outcome. Services provided to persons with disabilities must be documented as necessary to overcome related barriers to employment and must be provided as cost effectively as possible.

The Division strives to maintain a highly accountable program to all customers. Division employees and individuals with disabilities are accountable for their actions and will be held to the highest standard of responsibility.

IDVR provides, as appropriate to the vocational rehabilitation needs of each eligible individual, goods or services necessary to enable the individual to achieve an employment outcome.

EXCEPTION TO POLICY

Exceptions to policy require the approval of the VR Manager and the notification and



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consultation of the Chief of Field Services. VR Counselors are delegated substantial decision and purchasing authority based upon the caps outlined in the Payment Policy. Purchases in excess of delegated authority are reviewed by the Regional Manager and approved by the Chief of Field Services or designee (Field Services Manager).

1.1 Legal Citations

The IDVR program is operated in compliance with the federal Rehabilitation Act of 1973, as amended. The legal authorities for the policies contained in the Vocational Rehabilitation Services Policy Manual are: Title 34 CFR Part 361, issued January 17th, 2001 in the Federal Register implementing the Rehabilitation Act Amendments of 1998; and Title 67, Chapter 53 of the Idaho Code related to provisional appointments in state government for those with severe disabilities.

1.2 Program Requirements

Eligibility is determined without regard to sex, race, creed, age, color, national origin or type of disability.

There is no residency requirement. The individual must be living in the State of Idaho and legally able to work in the United States.

IDVR will establish and maintain a record of services for each applicant for, and recipient of, vocational rehabilitation services, which includes data necessary to comply with VR agency and Federal Rehabilitation Service Administration (RSA) requirements.

In the purchase of goods or services for persons with disabilities, IDVR complies with its procurement policy, Purchase of Services and Supplies for participant use in the Vocational Rehabilitation Program.

Case service expenditures require written authorization prior to the initiation of the service or the purchase of any equipment. Oral authorizations are permitted in emergency situations, but must be confirmed promptly in writing and forwarded to the provider. Authorizations are to be issued within three (3) days of the beginning date of service.

Goods and services will be provided subject to the availability of funds.

When appropriate, counselors shall refer individuals with disabilities to receive services from other agencies and organizations.

Each applicant or eligible individual being provided vocational rehabilitation services shall be informed of the procedure for requesting a review and a determination of agency action concerning the furnishing or denial of services, including the names and addresses of individuals with whom appeals may be filed and the availability of the



Client Assistance Program (CAP).

1.3 Provider Standards

IDVR requires service providers:

To be licensed by the Division of Occupational Licensing, a professional certifying body, The Division of Post-Secondary Education.

OR

IDVR requires service providers that offer vocational rehabilitation services to apply to be an approved service provider with the Division. Service provider's agreements may be secured by contacting the Divisional Regional Manager in the area.

OR

IDVR Counselors may occasionally approve the purchase of services from non-license providers such as, educational tutoring, foreign language interpreters, or other services to support the rehabilitation needs of an individual.

1.4 Selection of Service Providers

Providers are selected by a combination of participant choice and State procurement rules. The Service Provider Agreement states the provider's rate. Division counselors will assist the individual in acquiring information necessary to make an informed choice regarding the selection of the service provider. *The lowest cost qualified provider that meets the satisfaction of the individual is normally selected.*

1.4.1 Definitions:

(Reference Federal Register / Vol. 66, No. 11 / Wednesday, January 17, 2001 / Rules and Regulations)

- a. **Applicant** means an individual who submits an application for vocational rehabilitation services in accordance with Sec. 361.41(b)(2). (Authority: Section 12(c) of the Act; 29 U.S.C. 709(c))
- b. **Assessment for determining eligibility and vocational rehabilitation needs** means, as appropriate in each case, (i)(A) A review of existing data-- (1) To determine if an individual is eligible for vocational rehabilitation services; and (2) To assign priority for an Order of Selection described in Sec. 361.36 in the States that use an Order of Selection; and (B) To the extent necessary, the provision of appropriate assessment activities to obtain necessary additional data to make the eligibility determination and assignment; (ii) To the extent additional data are necessary to make a determination of the employment outcomes and the nature and scope of vocational rehabilitation services to be included in the individualized plan for employment of an eligible individual, a comprehensive assessment to

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determine the unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice, including the need for supported employment, of the eligible individual. This comprehensive assessment -- (A) Is limited to information that is necessary to identify the rehabilitation needs of the individual and to develop the individualized plan of employment of the eligible individual; (B) Uses as a primary source of information, to the maximum extent possible and appropriate and in accordance with confidentiality requirements--

- (1) Existing information obtained for the purposes of determining the eligibility of the individual and assigning priority for an Order of Selection described in Sec. 361.36 for the individual; and
 - (2) Information that can be provided by the individual and, if appropriate, by the family of the individual; (C) May include, to the degree needed to make such a determination, an assessment of the personality, interests, interpersonal skills, intelligence and related functional capacities, educational achievements, work experience, vocational aptitudes, personal and social adjustments, and employment opportunities of the individual and the medical, psychiatric, psychological, and other pertinent vocational, educational, cultural, social, recreational, and environmental factors that affect the employment and rehabilitation needs of the individual; and (D) May include, to the degree needed, an appraisal of the patterns of work behavior of the individual and services needed for the individual to acquire occupational skills and to develop work attitudes, work habits, work tolerance, and social and behavior patterns necessary for successful job performance, including the use of work in real job situations to assess and develop the capacities of the individual to perform adequately in a work environment; (iii) Referral, for the provision of rehabilitation technology services to the individual, to assess and develop the capacities of the individual to perform in a work environment; and (iv) An exploration of the individual's abilities, capabilities, and capacity to perform in work situations, which must be assessed periodically during trial work experiences, including experiences in which the individual is provided appropriate supports and training. (Authority: Section 7(2) of the Act; 29 U.S.C. 705(2))
- c. **Assistive technology device** means any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of an individual with a disability. (Authority: Section 7(3) of the Act; 29 U.S.C. 705(3))
- d. **Assistive technology service** means any service that directly assists an individual with a disability in the selection, acquisition, or use of an assistive technology device, including-- (i) The evaluation of the needs of an individual with a disability, including a functional evaluation of the individual in his or her customary environment; (ii) Purchasing, leasing, or otherwise providing for the acquisition by an individual with a disability of an assistive technology device; (iii) Selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing, or replacing assistive technology devices; (iv) Coordinating and using

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other therapies, interventions, or services with assistive technology devices, such as those associated with existing education and rehabilitation plans and programs; (v) Training or technical assistance for an individual with a disability or, if appropriate, the family members, guardians, advocates, or authorized representatives of the individual; and (vi) Training or technical assistance for professionals (including individuals providing education and rehabilitation services), employers, or others who provide services to, employ, or are otherwise substantially involved in the major life functions of individuals with disabilities, to the extent that training or technical assistance is necessary to the achievement of an employment outcome by an individual with a disability. (Authority: Sections 7(4) and 12(c) of the Act; 29 U.S.C. 705(4) and 709(c))

- e. **Community rehabilitation program.** (i) Community rehabilitation program means a program that provides directly or facilitates the provision of one or more of the following vocational rehabilitation services to individuals with disabilities to enable those individuals to maximize their opportunities for employment, including career advancement: (A) Medical, psychiatric, psychological, social, and vocational services that are provided under one management (B) Testing, fitting, or training in the use of prosthetic and orthotic devices (C) Recreational therapy. (D) Physical and occupational therapy. (E) Speech, language, and hearing therapy (F) Psychiatric, psychological, and social services, including positive behavior management. (G) Assessment for determining eligibility and vocational rehabilitation needs. (H) Rehabilitation technology (I) Job development, placement, and retention services. (J) Evaluation or control of specific disabilities (K) Orientation and mobility services for individuals who are blind. (L) Extended employment. (M) Psychosocial rehabilitation services. (N) Supported employment services and extended services. (O) Services to family members if necessary to enable the applicant or eligible individual to achieve an employment outcome. (P) Personal assistance services. (Q) Services similar to the services described in paragraphs (A) through (P) of this definition. (ii) For the purposes of this definition, the word program means an agency, organization, or institution, or unit of an agency, organization, or institution, that provides directly or facilitates the provision of vocational rehabilitation services as one of its major functions.
- f. **Comparable services and benefits means--** (i) Services and benefits that are-- (A) Provided or paid for, in whole or in part, by other Federal, State, or local public agencies, by health insurance, or by employee benefits; (B) Available to the individual at the time needed to ensure the progress of the individual toward achieving the employment outcome in the individual's individualized plan for employment in accordance with Sec. 361.53; and (C) Commensurate to the services that the individual would otherwise receive from the designated State vocational rehabilitation agency. (ii) For the purposes of this definition, comparable benefits do not include awards and scholarships based on merit. (Authority: Sections 12(c) and 101(a)(8) of the Act; 29 U.S.C. 709(c) and 721(a)(8))
- g. **Competitive employment** means work-- (i) In the competitive labor market that

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is performed on a full-time or part-time basis in an integrated setting; and (ii) For which an individual is compensated at or above the minimum wage, but not less than the customary wage and level of benefits paid by the employer for the same or similar work performed by individuals who are not disabled. (Authority: Sections 7(11) and 12(c) of the Act; 29 U.S.C. 705(11) and 709(c))

- h. **Employment outcome** means, with respect to an individual, entering or retaining full-time or, if appropriate, part-time competitive employment, as defined in Sec. 361.5(b)(11), in the integrated labor market, supported employment, or any other type of employment in an integrated setting, including self-employment, telecommuting, or business ownership, that is consistent with an individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. (Authority: Sections 7(11), 12(c), 100(a)(2), and 102(b)(3)(A) of the Act; 29 U.S.C. 705(11), 709(c), 720(a)(2), and 722(b)(3)(A))
- i. **Extended services** means ongoing support services and other appropriate services that are needed to support and maintain an individual with a most significant disability in supported employment and that are provided by a State agency, a private nonprofit organization, employer, or any other appropriate resource, from funds other than funds received under this part and 34 CFR part 363 after an individual with a most significant disability has made the transition from support provided by the designated State unit. (Authority: Sections 7(13) and 623 of the Act; 29 U.S.C. 705(13) and 795i)
- j. **Family member**, for purposes of receiving vocational rehabilitation services in accordance with Sec. 361.48(i), means an individual-- (i) Who either-- (A) Is a relative or guardian of an applicant or eligible individual; or (B) Lives in the same household as an applicant or eligible individual; (ii) Who has a substantial interest in the well-being of that individual; and (iii) Whose receipt of vocational rehabilitation services is necessary to enable the applicant or eligible individual to achieve an employment outcome. (Authority: Sections 12(c) and 103(a)(17) of the Act; 29 U.S.C. 709(c) and 723(a)(17))
- k. **Homemaker** is recognized as non-competitive gainful work. In order for a household manager to be considered an appropriate vocational objective, the individual must perform a majority of certain work activities within a family unit. These include, but are not limited to family financial management, cleaning, meal preparation, laundry, mending, childcare and other household activities. The performance of these responsibilities must positively impact the family's economic circumstances. For example, by rehabilitating an individual as a household manager, another family member is enabled to go to work. By rehabilitating a household manager, economic advantage occurs because the family will not have to pay someone else to perform household management tasks.
- l. **Indian tribe** means any Federal or State Indian tribe, band, rancheria, pueblo, colony, or community, including any Idaho native village or regional village corporation. (Authority: Section 7(19)(B) of the Act; 29 U.S.C. 705(19)(B))



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- m. **Individual with a disability**, except as provided in Sec. 361.5(b)(29), means an individual-- (i) Who has a physical or mental impairment; (ii) Whose impairment constitutes or results in a substantial impediment to employment; and (iii) Who can benefit in terms of an employment outcome from the provision of vocational rehabilitation services. (Authority: Section 7(20)(A) of the Act; 29 U.S.C. 705(20)(A))
- n. **Individual's representative** means any representative chosen by an applicant or eligible individual, as appropriate, including a parent, guardian, other family member, or advocate, unless a representative has been appointed by a court to represent the individual, in which case the court-appointed representative is the individual's representative. (Authority: Sections 7(22) and 12(c) of the Act; 29 U.S.C. 705(22) and 709(c))
- o. **Integrated setting**,-- (i) With respect to the provision of services, means a setting typically found in the community in which applicants or eligible individuals interact with non-disabled individuals other than non-disabled individuals who are providing services to those applicants or eligible individuals; (ii) With respect to an employment outcome, means a setting typically found in the community in which applicants or eligible individuals interact with non-disabled individuals, other than non-disabled individuals who are providing services to those applicants or eligible individuals, to the same extent that non-disabled individuals in comparable positions interact with other persons. (Authority: Section 12(c) of the Act; 29 U.S.C. 709(c))
- p. **Maintenance** means monetary support provided to an individual for expenses, such as food, shelter, and clothing, that are in excess of the normal expenses of the individual and that are necessitated by the individual's participation in an assessment for determining eligibility and vocational rehabilitation needs or the individual's receipt of vocational rehabilitation services under an individualized plan for employment. (Authority: Sections 12(c) and 103(a)(7) of the Act; 29 U.S.C. 709(c) and 723(a)(7))
- q. **Ongoing support services**, as used in the definition of "Supported employment" (i) Means services that are-- (A) Needed to support and maintain an individual with a most significant disability in supported employment; (B) Identified based on a determination by the designated State unit of the individual's need as specified in an individualized plan for employment; and (C) Furnished by the designated State unit from the time of job placement until transition to extended services, unless post-employment services are provided following transition, and thereafter by one or more extended services providers throughout the individual's term of employment in a particular job placement or multiple placements if those placements are being provided under a program of transitional employment; (ii) Must include an assessment of employment stability and provision of specific services or the coordination of services at or away from the worksite that are needed to maintain stability based on-- (A) At a minimum, *twice-monthly monitoring at the worksite* of each individual in supported



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employment; or (B) If under specific circumstances, especially at the request of the individual, the individualized plan for employment provides for *off- site monitoring, twice monthly meetings with the individual*; (iii) Consist of-- (A) Any particularized assessment supplementary to the comprehensive assessment of rehabilitation needs described in paragraph (b)(6)(ii) of this section; (B) The provision of skilled job trainers who accompany the individual for intensive job skill training at the work site; (C) Job development and training; (D) Social skills training; (E) Regular observation or supervision of the individual; (F) Follow-up services including regular contact with the employers, the individuals, the parents, family members, guardians, advocates or authorized representatives of the individuals, and other suitable professional and informed advisors, in order to reinforce and stabilize the job placement; (G) Facilitation of natural supports at the worksite; (H) Any other service identified in the scope of vocational rehabilitation services for individuals, described in Sec. 361.48; or (I) Any service similar to the foregoing services. (Authority: Sections 7(27) and 12(c) of the Act; 29 U.S.C. 705(27) and 709(c))

- s. ***Personal assistance services*** means a range of services provided by one or more persons designed to assist an individual with a disability to perform daily living activities on or off the job that the individual would typically perform without assistance if the individual did not have a disability. The services must be designed to increase the individual's control in life and ability to perform everyday activities on or off the job. The services must be necessary to the achievement of an employment outcome and may be provided only while the individual is receiving other vocational rehabilitation services. The services may include training in managing, supervising, and directing personal assistance services. (Authority: Sections 7(28), 102(b)(3)(B)(i)(I), and 103(a)(9) of the Act; 29 U.S.C. 705(28), 722(b)(3)(B)(i)(I), and 723(a)(9)) [[Page 272]]
- t. ***Physical and mental restoration services*** means-- (i) Corrective surgery or therapeutic treatment that is likely, within a reasonable period of time, to correct or modify substantially a stable or slowly progressive physical or mental impairment that constitutes a substantial impediment to employment; (ii) Diagnosis of and treatment for mental or emotional disorders by qualified personnel in accordance with State licensure laws; (iii) Dentistry; (iv) Nursing services; (v) Necessary hospitalization (either inpatient or outpatient care) in connection with surgery or treatment and clinic services; (vi) Drugs and supplies; (vii) Prosthetic and orthotic devices; (viii) Eyeglasses and visual services, including visual training, and the examination and services necessary for the prescription and provision of eyeglasses, contact lenses, microscopic lenses, telescopic lenses, and other special visual aids prescribed by personnel that are qualified in accordance with State licensure laws; (ix) Podiatry; (x) Physical therapy; (xi) Occupational therapy; (xii) Speech or hearing therapy; (xiii) Mental health services; (xiv) Treatment of either acute or chronic medical complications and emergencies that are associated with or arise out of the provision of physical and mental restoration services, or that are inherent in the condition under treatment; (xv) Special services for the treatment of individuals with end- stage renal disease, including transplantation, dialysis, artificial kidneys, and supplies;

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and (xvi) Other medical or medically related rehabilitation services. (Authority: Sections 12(c) and 103(a)(6) of the Act; 29 U.S.C. 709(c) and 723(a)(6))

- u. ***Physical or mental impairment*** means-- (i) Any physiological disorder or condition, cosmetic disfigurement, or anatomical loss affecting one or more of the following body systems: neurological, musculo-skeletal, special sense organs, respiratory (including speech organs), cardiovascular, reproductive, digestive, genitourinary, hemic and lymphatic, skin, and endocrine; or (ii) Any mental or psychological disorder such as mental retardation, organic brain syndrome, emotional or mental illness, and specific learning disabilities. (Authority: Sections 7(20)(A) and 12(c) of the Act; 29 U.S.C. 705(20)(A) and 709(c))
- v. ***Post-employment services*** means one or more of the services identified in Section 361.48 that are provided subsequent to the achievement of an employment outcome and that are necessary for an individual to maintain, regain, or advance in employment, consistent with the individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. (Authority: Sections 12(c) and 103(a)(18) of the Act; 29 U.S.C. 709(c) and 723(a)(18)) Note to paragraph (b)(42): Post-employment services are intended to ensure that the employment outcome remains consistent with the individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. These services are available to meet rehabilitation needs that do not require a complex and comprehensive provision of services and, thus, should be limited in scope (\$1,000 or less) and duration (6 months or less). If more comprehensive services are required, then a new rehabilitation effort should be considered. Post-employment services are to be provided under an amended individualized plan for employment; thus, a re-determination of eligibility is not required. The provision of post-employment services is subject to the same requirements in this part as the provision of any other vocational rehabilitation service. Post-employment services are available to assist an individual to maintain employment, e.g., the individual's employment is jeopardized because of conflicts with supervisors or co-workers, and the individual needs mental health services and counseling to maintain the employment; to regain employment, e.g., the individual's job is eliminated through reorganization and new placement services are needed; and to advance in employment, e.g., the employment is no longer consistent with the individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.
- w. ***Rehabilitation engineering*** means the systematic application of engineering sciences to design, develop, adapt, test, evaluate, apply, and distribute technological solutions to problems confronted by individuals with disabilities in functional areas, such as mobility, communications, hearing, vision, and cognition, and in activities associated with employment, independent living, education, and integration into the community. (Authority: Section 7(12)(c) of the Act; 29 U.S.C. 709(c))
- x. ***Rehabilitation technology*** means the systematic application of technologies,



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engineering methodologies, or scientific principles to meet the needs of, and address the barriers confronted by, individuals with disabilities in areas that include education, rehabilitation, employment, transportation, independent living, and recreation. The term includes rehabilitation engineering, assistive technology devices, and assistive technology services. (Authority: Section 7(30) of the Act; 29 U.S.C. 705(30))

- y. ***Substantial impediment to employment*** means that a physical or mental impairment (in light of attendant medical, psychological, vocational, educational, communication, and other related factors) hinders an individual from preparing for, entering into, engaging in, or retaining employment consistent with the individual's abilities and capabilities. (Authority: Sections 7(20)(A) and 12(c) of the Act; 29 U.S.C. 705(20)(A) and 709(c))
- aa. ***Supported employment means--*** (i) Competitive employment in an integrated setting, or employment in integrated work settings in which individuals are working toward competitive employment, consistent with the strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice of the individuals with ongoing support services for individuals with the most significant disabilities-- (A) For whom competitive employment has not traditionally occurred or for whom competitive employment has been interrupted or intermittent as a result of a significant disability; and (B) Who, because of the nature and severity of their disabilities, need intensive supported employment services from the designated State unit and extended services after transition as described in paragraph (b)(20) of this section to perform this work; or (ii) Transitional employment, as defined in paragraph (b)(54) of this section, for individuals with the most significant disabilities due to mental illness. (Authority: Section 7(35) of the Act; 29 U.S.C. 705(35))
- bb. ***Supported employment services*** means ongoing support services and other appropriate services needed to support and maintain an individual with a most significant disability in supported employment that are provided by the designated State unit-- (i) For a period of time not to exceed 18 months, unless under special circumstances the eligible individual and the rehabilitation counselor or coordinator jointly agree to extend the time to achieve the employment outcome identified in the individualized plan for employment; and (ii) Following transition, as post-employment services that are unavailable from an extended services provider and that are necessary to maintain or regain the job placement or advance in employment. (Authority: Sections 7(36) and 12(c) of the Act; 29 U.S.C. 705(36) and 709(c))
- cc. ***Transition services*** means a coordinated set of activities for a student designed within an outcome-oriented process that promotes movement from school to post-school activities, including postsecondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation. The coordinated set of activities must be based upon the individual student's needs, taking into account the student's preferences and interests, and must include



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instruction, community experiences, the development of employment and other post-school adult living objectives, and, if appropriate, acquisition of daily living skills and functional vocational evaluation. Transition services must promote or facilitate the achievement of the employment outcome identified in the student's individualized plan for employment. (Authority: Section 7(37) and 103(a)(15) of the Act; 29 U.S.C. 705(37) and 723(a)(15))

- dd. ***Transitional employment***, as used in the definition of "Supported employment," means a series of temporary job placements in competitive work in integrated settings with ongoing support services for individuals with the most significant disabilities due to mental illness. In transitional employment, the provision of ongoing support services must include continuing sequential job placements until job permanency is achieved. (Authority: Sections 7(35)(B) and 12(c) of the Act; 29 U.S.C. 705(35)(B) and 709(c))
- ee. ***Transportation*** means travel and related expenses that are necessary to enable an applicant or eligible individual to participate in a vocational rehabilitation service, including expenses for training in the use of public transportation vehicles and systems. (Authority: 103(a)(8) of the Act; 29 U.S.C. 723(a)(8)) (i) Examples: The following are examples of expenses that would meet the definition of transportation. The examples are purely illustrative, do not address all possible circumstances, and are not intended to substitute for individual counselor judgment. Example 1: Travel and related expenses for a personal care attendant or aide if the services of that person are necessary to enable the applicant or eligible individual to travel to participate in any vocational rehabilitation service. Example 2: Relocation expenses incurred by an eligible individual in connection with a job placement that is a significant distance from the eligible individual's current residence.
- ff. ***Unpaid Family Worker*** is recognized as non-competitive gainful work. In order for unpaid family work to be considered an appropriate vocational objective, the individual must work in a family business or on a family farm, which is operated by one or more members of the participant's family.

SECTION 2.0 - ETHICS

- A. All Idaho Division of Vocational Rehabilitation (IDVR) employees must adhere to the Idaho Ethics in Government Manual:
<http://www2.state.id.us/ag/manuals/index.html>
- B. IDVR ascribes to, and requires all Vocational Rehabilitation Counselors and Field Service Staff to follow the Code of Professional Ethics for Rehabilitation Counselors accepted by the Commission of Rehabilitation Counselor Certification. (CRCC).
<http://www.crc certification.com>
 - 1. The Non-Professional Relationships with Participants, code A.6b. states:

“Rehabilitation counselors will not accept as participants, superiors or subordinates with whom they have administrative, supervisory, or evaluative relationships.”

Prior to, or at the time of appointment to employment at IDVR of a participant, a counselor may be assigned outside of the home office of the employee in order to ensure that there is no conflict of interest between the employee and the counselor who assisted with the vocational rehabilitation of that particular individual during the placement and follow-along period.

Internships, volunteers or trial work experiences of individuals served by IDVR will be conducted outside the home office of the assigned counselor.
- C. Service Providers of the Division are expected to adhere to the same ethical principles as Division staff in addition to any professional code of ethics that may apply to their own profession.

SECTION 3.0 PROTECTION, USE, AND RELEASE OF PERSONAL INFORMATION

3.1 Confidentiality

All information acquired by Idaho Division of Vocational Rehabilitation (IDVR) must be used only for purposes directly connected with the administration of the vocational rehabilitation program. As a general rule, information containing personal information may not be shared with advisory or other bodies that do not have official responsibility for administration of the program, except as provided in this policy. Use, release and obtaining of personal information by IDVR shall conform to applicable state law and rules, and applicable federal law and regulations.

Requests for information under the Idaho public records laws should be referred to the deputy attorney general assigned to the agency.

For purposes of this policy, informed written consent shall:

- A. Be explained in language that the individual or their representative understands;
- B. Be dated, and specify the length of effect;
- C. Be specific in designating IDVR as the agency authorized to use, disclose or receive information;
- D. Be specifically designated to the parties to whom the information may be released; and
- E. Specifically designate the parties to whom the information may be released; and
- F. Be specific as to the purpose(s) for which the information may be used.

3.2 Release of Personal Information to Individuals with Disabilities, their Representative or Attorney

If requested in writing by an individual participant of IDVR, and upon informed written consent by the individual and/or his or her representative, all information in such individual's case record that pertains to such individual shall be made available in a timely manner to that individual, except:

- 3.2.1** Medical, psychological or other information that IDVR believes may be harmful to the individual. That information may be provided through a chosen representative, physician, licensed psychologist. *That information*

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may also be provided directly to the individual only after the VR counselor or professional vendor who authored the information explains in detail the sensitive nature of such information and how that information can be misinterpreted or misunderstood by the individual or associates who may receive access to it.

- 3.2.2** Information obtained from outside IDVR may be released only under the conditions established by the outside agency, organization or provider or mandated for them by federal or state law.
- 3.2.3** An individual who believes that information in the record of services is inaccurate or misleading may request that IDVR amend the information. If the information is not amended, the individual may request that his/her own amending statement be inserted into the record of services.
- 3.2.4** IDVR will respond to a request made under this section within ten (10) working days after receipt of a written request. One copy of the case record will be made for the individual at no charge. Subsequent copies will be provided at the flat fee of \$25.

3.3 Release to Other Agencies or Organizations

If information requested has been obtained from another agency, organization or professional, it will be released only under conditions established by that agency, organization or professional.

- 3.3.1** IDVR may release personal information without informed written consent of the individual in order to protect the individual or others when the individual poses a threat to his/her safety or the safety of others.

3.4 Release in Response to Investigations in Connection with Law Enforcement

IDVR shall release personal information in response to investigations in connection with law enforcement, fraud, or abuse, unless expressly prohibited by Federal or State laws or regulations, and in response to a court order.

3.5 Release for Audit, Evaluation or Research

At the discretion of the Administrator, personal information may be released to an organization, agency, or individual engaged in audit, evaluation or research only for purposes directly connected with the administration of the vocational rehabilitation program, or for purposes which would significantly improve the quality of life for

individuals with disabilities, and only if the organization, agency or individual assures that:

- A. The information will be used only for the purposes for which it is being provided;
- B. The information will be released only to individuals officially connected with the audit, evaluation or research;
- C. The information will not be released to the involved individual;
- D. The information will be managed in a manner to safeguard confidentiality and,
- E. The final product will not reveal any personal identifying information without the informed written consent of the involved individual, and/or his/her representative.

3.6 Subpoena for Release of Information to the Courts, Other Judicial Bodies, Worker's Compensation and Law Enforcement Agencies

A subpoena issued to IDVR for information relating to a participant of IDVR must immediately be referred to the Chief of Field Services who will subsequently refer the document to the deputy attorney general assigned to the agency.

3.7 Social Security Information

Confidentiality of SSA information is covered under Section 11.06 of the Social Security Act and may be disclosed only as prescribed by regulations. The Act permits disclosure of all information about a claimant to State VR agencies. State VR agencies routinely obtain information, including entitled and medical information, from SSA records. Medical information may be obtained without the claimant's consent; however, State VR agencies may not permit access to such information, release it further (this includes other state agencies), or testify concerning it for any other purpose than the rehabilitation of the Social Security Disability beneficiary claimant. To obtain information from Disability Determination Services, a release form must be used.

SECTION 4.0 APPEALS PROCESS

The IDVR counselor shall notify and provide written information to all applicants and eligible individuals regarding:

- A. Their right to appeal determinations made by IDVR personnel, which affect the provision of rehabilitation services;
- B. Their right to request mediation;
- C. The names and addresses of individuals for whom requests for mediation or appeals may be filed;
- D. The manner in which a mediator or hearing officer may be selected;
- E. Availability of assistance from the Client Assistance Program (CAP).
- F. If the agency is following an order of selection, their priority category under determination of severe disability.

Timing of such notification shall be provided by the IDVR counselor:

- A. At the time an individual applies for rehabilitation services;
- B. At the time the Individualized Plan for Employment (IPE) is developed;
- C. At the time the individual is assigned to a category in the State's order of selection, if applicable; and
- D. Upon reduction, suspension, or cessation of rehabilitation services for the individual.

Whenever possible, IDVR will attempt to resolve conflicts informally or through the Informal Administrative Review process. IDVR will not pay for an individual's legal services

IDVR shall make disability related accommodations to assist individuals in the conduct of the appeals process.

4.1 Continuation of Services Pending Completion of the Hearing

Pending a final determination of an Informal Review or hearing, IDVR may not suspend, reduce, or terminate services being provided under an IPE, unless the services were obtained through misrepresentation, fraud or collusion or the individual or authorized representative, requests suspension, reduction, or termination of services.



4.2 Client Assistance Program (CAP) and Supervisory Review

The CAP and supervisory review are encouraged as a means to resolve dissatisfaction. These options are in keeping with the IDVR policy to resolve an individual's dissatisfaction at the earliest possible time.

4.3 Informal Appeals Process: 45 days maximum to decision

4.3.1 The Informal Administrative Review process is an option available to the individual as a proven means likely to result in a timely resolution of disagreements. An individual must request an Informal Administrative Review within ten (10) calendar days of the agency notice regarding the provision or denial of services that are in question. The request must be in writing to the Regional Manager. The request must describe the complaint.

In holding an Informal Administrative Review, the Regional Manager will function as the Administrative Review Officer and will be responsible for:

- A. Conducting the review within fifteen (15) calendar days following written receipt of a request for such a hearing.
- B. Advising the individual of his/her right to have a representative present and encouraging the individual to use the services of CAP.
- C. Insuring that the review is conducted at a time mutually agreed to by the parties involved that ensures the entire appeals process can be completed within forty-five (45) calendar days, unless the parties agree to a specific extension of time.
 - a. When undue delay is caused by the individual in scheduling an Administrative Review, the individual will be informed that if the review is not conducted within thirty (30) calendar days following the individual's request for an Informal Administrative Review, the individual's request will be viewed by the IDVR as invalid.
 - b. When the individual makes a documented effort to utilize CAP or another selected advocate to resolve his/her dissatisfaction, the time allowed for conducting an Administrative Review will be extended accordingly.
- D. Holding the review at a time and place convenient to the individual, generally at the local IDVR branch office.
- E. Providing communication methods for those individuals who have a sensory impairment. An interpreter will be provided for those individuals

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who cannot communicate in English.

- F. Assuring that the individual is provided transportation to and from the review site, if needed.
- G. The Administrative Review Officer (Regional Manager) will attempt to resolve the matter to the satisfaction of the individual, developing a written agreement with the individual at the conclusion of the appeal process. A copy will be sent to the Administrator, Chief of Field Services, the involved counselor(s) and the counselor's supervisor. The results are binding for the agency unless the decision is not permitted by law. The individual may reject the findings of the review and request a formal appeal known as an Impartial Due Process Hearing.

4.4 Formal Appeals Process

The Formal Appeal Process is an option available to any individual who is dissatisfied with any determination made by personnel of IDVR that affects the provisions of vocational rehabilitation services. An individual may request, or if appropriate, may request through the individual's representative, a timely review of the determination. Such request must be made within sixty (60) days of the IDVR case management decision resulting in the initial disagreement. The Formal Appeal Process shall include an Impartial Due Process Hearing by an Impartial Hearing Officer (IHO).

An individual may request an Impartial Due Process Hearing immediately without having to go through other appeal steps. Even if an individual agrees to an informal hearings process, such individual is entitled to a Due Process Hearing within sixty (60) days of the IDVR case management decision that initiated the disagreement, unless both parties agree to an extension.

- 4.4.1** A formal hearing is a procedure whereby an individual who is dissatisfied with any determination concerning the provision or denial of IDVR services or the findings of the Administrative Review may seek a determination of agency action before an Impartial Hearing Officer.
- 4.4.2** The individual must request a hearing within ten (10) calendar days of the agency notice regarding the provision or denial of services based upon the conclusion of the Administrative Review or mediation. The individual may bypass the Informal Administrative Review or mediation process entirely and go directly to the Impartial Due Process Hearing (fair hearing). That process will then commence immediately.
- 4.4.3** A request for a hearing must be sent in writing to the Chief of Field Services and clearly state the individual's dissatisfaction.

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- 4.4.4** The hearing shall be conducted within sixty (60) calendar days of receipt of the individual's request for review, unless informal resolution is achieved prior to the 60th day, or the parties agree to a specific extension of time.
- 4.4.5** A hearing shall be conducted by an Impartial Hearing Officer selected from the pool of qualified persons identified jointly by the Administrator of IDVR and the State Rehabilitation Council.
- 4.4.6** The Hearing Officer shall issue a written report of the findings and decision of the hearing within thirty (30) calendar days of the completion of the hearing.
- 4.4.7** The decision of the hearing officer shall be considered final by the agency.
- 4.4.8** Any party who disagrees with the findings and decisions of an impartial hearing officer shall have the right to bring a civil action with respect to the matter in dispute. The action may be brought in any state court of competent jurisdiction or in a district court of the United States of competent jurisdiction without regard to the amount in controversy.

4.5 *Mediation*

- 4.5.1** Mediation is an alternate dispute resolution method available to applicants and eligible individuals who have initiated the Formal Appeals Process.
 - A. An individual must request Mediation within ten (10) calendar days of the agency notice regarding the results of the Administrative Review. Mediation is available to an individual when an Administrative Review has not resolved the dispute to the satisfaction of the individual.
 - B. A request for mediation must be made in writing to the Chief of Field Services and clearly state the reason for dissatisfaction with the results of the Administrative Review. The Chief of Field Services will represent IDVR or assign a member of the administrative or supervisory staff who has not participated in agency action that created the individual's dissatisfaction.
 - C. Participation in the mediation process is voluntary on the part of the individual and on the part of IDVR. Either party may reject mediation as an alternate dispute resolution method. Either party, once accepting mediation as an alternate dispute resolution method, may terminate the mediation process.
 - D. Mediation is not used to deny or delay the individual's right to pursue an impartial hearing. Should the individual and/or designated representatives select mediation in lieu of a formal hearing; the option for the formal hearing will be extended to allow the results of the mediation to be established. After the final results of the mediation

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are determined, the individual retains the right to request a formal hearing.

- E. Mediation is conducted by qualified and impartial mediators, who are selected randomly from a list of mediators maintained by the IDVR.
- F. Mediation discussions are confidential and may not be used as evidence in a subsequent due process hearing.
- G. The mediator will develop a written Mediation Agreement, if agreement between the parties is reached, signed by the individual, the mediator and IDVR.
- H. Cost of mediation is paid by IDVR, although no costs are provided for representation for the individual.

Client Appeals Process

FORMAL PROCESS		INFORMAL PROCESS	
File request for Impartial Due Process Hearing (fair hearing) to IDVR Administration		File request for Informal Dispute Resolution (administrative review) to Regional Manager. State reason for review.	File request for Mediation to Regional Manager. State reason for mediation.
Impartial Due Process Hearing (fair hearing) conducted by Impartial Hearing Office within 60 days of request.		Informal Dispute Resolution (administrative review) conducted by Regional Manager within 45 day time period.	Mediation conducted by impartial Mediator within 45 day time period.
IHO chosen from State approved list = IHO informs client of time and date.		Regional Manager informs client of time and date.	Mediator chosen from list of qualified mediators. Mediator informs all parties of time and date.
Decision Final		Regional Manager makes decision on Informal Dispute Resolution (administrative review). Responds in writing to client.	Written Mediation Agreement
Civil action initiated within any court of competent jurisdiction or district court.		Client may request Impartial Due Process Hearing (fair hearing) or Mediation if, dissatisfied with Informal Dispute Resolution (administrative review).	Client may request an Informal Dispute Resolution (administrative review) or Impartial Due Process (fair hearing) if dissatisfied with Mediation.

SECTION 5.0 APPLICATION FOR SERVICES / ELIGIBILITY DETERMINATION

5.1 Application for Idaho Division of Vocational Rehabilitation (IDVR) Services

An applicant is:

- A. An individual who believes s/he has a disability that creates an impediment to employment; who believes s/he requires VR services; and who desires employment as an outcome of those services;
AND
- B. Who signs a dated application or dated document requesting services;
AND
- C. Who has provided information necessary to initiate an assessment to determine eligibility;
AND
- D. is available to complete the assessment process.

It is the policy of IDVR to respond to referrals as soon as possible. The goal of IDVR is to respond to a referral within 5 working days to initiate the application process.

5.2 Assessment for determining eligibility and priority for services

Any individual who applies for services shall undergo an assessment for determining eligibility and the priority for services, the results of which shall be shared with the individual.

The assessment will be conducted in the most integrated setting possible and consistent with the needs and informed choice of the individual.

Eligibility for IDVR service shall be determined within a reasonable period of time, not to exceed 60 days after the application for services has been received (signed and dated) unless the following occurs:

- A. The applicant is notified that exceptional and unforeseen circumstances beyond control of IDVR preclude the counselor from completing the determination within the prescribed time frame and the applicant agrees that an extension of time is warranted;
OR
- B. A trial work experience including an exploration of the individual's abilities, capabilities, and capacity to perform in work situations is carried out;
OR
- C. An extended evaluation is necessary



IDVR Referral Information

MY PERSONAL INFORMATION: Date: ____/____/____

SS#: ____ - ____ - ____

I am a previous Voc Rehab Client? ☐ Yes ☐ No If Yes, Where? _____

First Name: _____ Middle: _____

Last Name: _____ Preferred Name: _____

Gender: _____ Birth Date: ____/____/____

Previous Last Name: _____

MY ADDRESS:

Home Address: _____

City: _____ State: ____ Zip: ____ - ____

County: _____

Mailing Address: _____

City: _____ State: ____ Zip: ____ - ____

County: _____

Primary Phone: (____) - ____ - ____ ☐ Voice ☐ TDD ☐ Fax

Second Phone: (____) - ____ - ____ ☐ Voice ☐ TDD ☐ Fax

E-mail: _____

Select one or more of the following races/ethnicities:

☐ American Indian or Alaskan Native

☐ Asian

☐ Black

☐ Hispanic or Latino

☐ Native Hawaiian or Other Pacific Islander

☐ White

Primary Language: _____
English ASL Spanish Other

Special Language Needs: ☐ Yes ☐ No

If Yes, Explain: _____



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CONTACTS: (Examples: Family, Friends, PO, Case Worker Etc.)

	Name	Relationship	Phone	Ext.#	Voice/ TDD/ Fax
1.			()- -		
2.			()- -		
3.			()- -		

Who referred me to Voc Rehab: _____

What are my current living arrangements? (Private Residence, Halfway House, Shelter Etc.)

Marital Status: ☐ Married ☐ Widowed ☐ Divorced ☐ Separated ☐ Never Married

Spouse's Name: _____

FINANCIAL:

Number of family members living with me: _____ Number of Dependents: _____

Names and ages of children: _____

Currently owe Child Support: ☐ Yes ☐ No Amount: \$ _____

My Primary Source of Support: (Current Earnings, Friends & Family, Public Assistance, Etc.)

I have one or more of the following medical insurances:

☐ Medicaid

☐ Private insurance through own employment

☐ Medicare

Provider _____

☐ Worker's compensation

☐ Public insurance from other source

Provider _____

☐ None

☐ Private insurance through other means

Provider _____



denied pending terminated

denied pending terminated

other cash

Worker's Compensation: \$

	cash	other		cash	other
SSI Aged:	\$ _____	<input type="checkbox"/>	Worker's Compensation:	\$ _____	<input type="checkbox"/>
SSI Disabled:	\$ _____	<input type="checkbox"/>	Other Disability:	\$ _____	<input type="checkbox"/>
SSDI:	\$ _____	<input type="checkbox"/>	Other:	\$ _____	<input type="checkbox"/>
VA:	\$ _____	<input type="checkbox"/>	TANF:	\$ _____	<input type="checkbox"/>

If I am attending High School, the name of the school is:

(Please make sure to include negative work history so that we better know your needs)

	Employer Name and Address	Job Title	Job Duties	Hours Per Week	Salary Start / Ending	Start/ End Date	Reason for Leaving
1							
2							

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3							
4							
5							

DISABILITIES:

I have been diagnosed or treated for the following disabilities:

(Physical, Injuries, Mental Health, Depression, Substance Abuse, Learning Disability etc.)

My disability makes it difficult to:

(Describe how it affects you in the space provided)

☐ Stand ☐ Walk ☐ Sit ☐ Lift ☐ Bend ☐ Use Hands or Feet

Explain: _____

☐ See ☐ Hear ☐ Read ☐ Write

Explain: _____

☐ Concentrate ☐ Remember ☐ Learn ☐ Understand

Explain: _____

☐ Handle Stress ☐ Control Emotions ☐ Work with Others ☐ Communicate

Explain: _____

☐ Other: _____



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I am participating in the following program(s):

☐ None

☐ Adult Correction

☐ Community Supported Employment

☐ General VR Kidney

☐ IDOC Reentry Program

☐ Juvenile Correction

☐ Medicaid

☐ Medicare

☐ Migrant Farm Worker not in Section 304 Project

☐ Migrant Service Coordination Grant Under 304

☐ School-Work

Have you been convicted of a felony: ☐ Yes ☐ No

Describe: _____

Currently on Probation / Parole: ☐ Yes Probation/Parole officer is: _____

Current & Valid Driver's License: ☐ Yes ☐ No (explain) _____

Veteran: ☐ Yes ☐ No

DOCUMENTATION

How do you think Vocational Rehabilitation can help you get a job and keep a job?

*****AGENCY USE ONLY*****

Next step in establishing eligibility:

Additional information or comments:

5.3 Eligibility Criteria

An individual is eligible for Vocational Rehabilitation if the following criteria are met:

- A. A determination by “qualified personnel” (See 5.3.1) that the applicant has a physical or mental impairment;
- B. A determination by qualified personnel that the applicant’s physical or mental impairment constitutes or results in a substantial impediment to employment for the applicant;
- C. A determination by a qualified vocational rehabilitation counselor employed by IDVR that the individual requires vocational rehabilitation services to prepare for, secure, retain or regain employment consistent with the applicant’s unique strengths, resources, priorities, concerns, abilities, capabilities, interest and informed choice;
- D. A presumption by a qualified vocational rehabilitation counselor that the applicant can benefit in terms of an employment outcome from the provision of vocational rehabilitation services.

NOTE: *The individual can benefit in terms of an employment outcome from vocational rehabilitation services unless the counselor demonstrates on the basis of clear and convincing evidence, and only after an exploration of the individual’s abilities, capabilities, and capacity to perform in work situations or an extended evaluation is carried out, that such individual is incapable of benefiting from vocational rehabilitation services in terms of an employment outcome.*

5.3.1 Qualified Personnel

IDVR has established a policy for accessing “qualified personnel” for the purpose of disability determination. Under the Rehabilitation Act, the assessment for determining eligibility must be made by “qualified personnel” including, if appropriate, personnel skilled in rehabilitation technology (Section 103(a)(1) of the Act). In addition, diagnosis and treatment for mental and emotional disorders must be provided by “qualified personnel who meet State licensure laws” (Section 103 (a)(6)(F) of the Act).

The preamble to the VR program regulations (Federal Register, Vol. 62, No. 28. February 11, 1997, page 6324) states that a determination that an individual has a physical or mental impairment, or meets any of the other eligibility criteria of 34 CFR 361.42(a) must be made by personnel who meet existing licensure, certification, or registration requirements applicable to their profession. Depending upon the profession, “qualified personnel” could include individuals licensed, certified, or registered under state law or State regulations or some type of national licensure, certification, or registration process.

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The determination of the existence of an impairment should be supported by medical and/or psychological documentation. Medical/psychological disabilities shall be diagnosed by individuals who demonstrate the possession of requisite state licensure, certification, or registration of requirements applicable to the practice of their profession within the state of Idaho.

The following occupations have been licensed in Idaho to provide general medical diagnoses. *The VR Counselor can utilize general medical diagnoses established by these medical professionals.*

- Medical Physician or Doctor of Osteopathy
- Nurse Practitioner (works under own licensure)
- Physician's Assistant (works under a "Delegation of Services Agreement" with a physician providing oversight)

The following occupations have been licensed in Idaho to provide specific medical diagnoses within the specialized areas of competency for which the specific licensure has been determined. *It is critical that the VR Counselor take special precaution to ensure that when utilizing medical diagnoses from one of the medical professions listed below that only those areas of expertise for which the particular professional has been credentialed are documented within the eligibility determination module.*

- Licensed Psychologist
- Chiropractor
- Naturopath
- Podiatrist
- Optometrist
- Physical Therapist
- Dentist/Orthodontist
- Advanced Certified Alcohol and Drug Counselor (ACADC) / Certified Alcohol and Drug Counselor (CADC)

For further clarification, you may access www.ibol.idaho.gov and connect to "The Individual Board Pages" to determine the full extent of the professional latitude allocated to the medical occupations that are licensed to provide specialized services within narrowly defined parameters of competency. The State Board of Medicine maintains jurisdiction over the authority and conduct of medical doctors.

RSA mandates that either federal or state sponsored boards must grant authority to all licensures, certifications or registrations that qualify a professional to diagnose disabilities for the purpose of agency eligibility. Private Licensing/certifying boards outside the federal/state purview cannot be utilized as a basis for VR diagnostic purposes.

5.4 Social Security Presumption

Any applicant, who has been determined eligible for Social Security benefits under Title II or Title XVI of the Social Security Act, is presumed to meet the eligibility



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requirements for vocational rehabilitation services and is considered an individual with a significant disability.

Following an application and initial interview where an individual reports receiving SSI or SSDI, the counselor will obtain verification of receipt of SSI/SSDI, such as an award letter, a copy of the individual's check, or a verification document through the Social Security Entry and Verification System (SVES). Upon verification, the individual is made eligible for vocational rehabilitation with a Presumption of Eligibility statement in the record of services.

NOTE: If the applicant presents sufficient medical documentation to determine eligibility at the first meeting, verification will still be procured but eligibility can be determined immediately without designating presumptive status.

The assessment for determining rehabilitation needs will continue, as needed, to obtain information necessary to determine the Individual Plan for Employment. This assessment will include gathering existing records to determine the individual's impairment, impediment and nature and scope of the VR services necessary to obtain an employment outcome consistent with the individuals' unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

When the assessment adequately documents the impairment(s), employment impediment(s) and required service(s) needed, the qualified VR counselor completes an Eligibility Determination in the agency computerized data system (Gemini).

If an individual receives disability benefits under Title II or Title XVI of the Social Security Act and intends to work, IDVR presumes eligibility for services, unless, because of the significance of the individual's disability, a VR counselor cannot presume that VR services will enable the individual to work.

Should the significance of the disability prevent a VR counselor from presuming that VR services will enable the individual to work, the individual will be asked to complete a trial work experience in order for the counselor to make an eligibility decision.

If the individual cannot take advantage of a trial work experience, an extended evaluation must be conducted in order to make the decision of eligibility.

5.5 Review and assessment of data for eligibility determination

The eligibility determination shall be based on the review and assessment of existing data, including counselor observations, education records, and information provided by the individual or family, particularly information used by education officials and determinations made by officials or other agencies. Current medical records will, of course, be utilized to determine the nature and extent of the disability as well as for justification for the procurement of additional medical data when required to



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identify/verify alleged medical restrictions.

To the extent that existing data does not describe the current functioning of the individual, IDVR will conduct an assessment of additional data resulting from the provision of VR services including trial work experiences, assistive technology devices and services, personal assistance services, and any other support services that are necessary to determine whether an individual is eligible.

Upon completion of the eligibility assessment, the counselor shall make one of the following determinations:

5.5.1 Eligibility: For each individual determined eligible for vocational rehabilitation services, the record of services must include a dated Eligibility Determination completed by a qualified vocational rehabilitation counselor.

5.5.2 Trial Work Experiences (TWE) for individuals with significant disabilities:

Prior to any determination that an individual with a disability is incapable of benefiting from VR services in terms of an employment outcome because of the severity of that individual's disability, an exploration of that individual's abilities, capabilities, and the capacity to perform in realistic work situations must be conducted to determine whether or not there is clear and convincing evidence to support such a determination.

In such cases a written plan must be developed to assess and determine the above. The assessment must be provided in the most integrated setting possible, consistent with the informed choice and rehabilitation needs of the individual. TWE include supported employment, situational assessment and other experiences using realistic work setting and must be of sufficient variety and over a sufficient period of time to make such a determination. Appropriate supports, including assistive technology devices and services and personal assistance services to accommodate the rehabilitation needs of the individual must be provided.

Remember: Trial Work Experience should be used to demonstrate whether the individual is capable of benefiting from VR services. Trial Work Experience will be conducted before Presumptive Eligibility is completed if there is a question regarding capacity to benefit.

To place participant in Trial Work Experience, VR Counselor must:

- 1) Determine that individual has a significant physical or mental impairment (disability) that is a substantial impediment (barrier) to employment.

Document in Gemini, under Disability Browse, in the Disability sub-page. Document each disability and its associated functional limitations separately under Disability Documentation and Other Comments. Gemini will number them: 1, 2, 3, etc. Please enter them in order of priority – primary will be #1, secondary #2, etc.

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Document in Gemini in Eligibility Determination using check boxes and the text box under #3 Impediment to Employment.

- 2) Have questions about whether the participant is capable or incapable of benefiting in terms of an employment outcome from VR services due to severity of disability.
- 3) If Trial Work is determined to be appropriate a case note will be completed within of 5 days of receipt of SSA verification document(s) and a plan will be developed within 30 days.
- 4) With the participant, develop a Trial Work Experiences plan to assess the participant's ability, capabilities and capacity to perform in realistic work situations through the use of Trial Work Experiences. The TWEs must be provided in the most integrated setting possible, consistent with the informed choice and rehabilitation needs of the participant. TWEs may include CBWE, CBWA, CSE, job coaching, on-the-job training or other experiences using realistic work settings, as well as assistive technology and other needed services.

In Gemini, do not document in #4 Documentation or put in the Eligibility date at this time. You may complete these after the TWE plan if you go ahead with Eligibility determination.

- 5) Review Gemini 3, Client Rights and Responsibilities
- 6) Assess need for Rehabilitation Technology Services, if and when necessary.
- 7) Insure that individual is an active partner, making meaningful and informed choices in the provision of Trial Work Experiences.
- 8) Review the TWE Plan at least every 90 days to determine if there is sufficient evidence to conclude that the participant can benefit from VR Services in terms of an employment outcome or there is clear and convincing evidence that the participant is incapable of benefiting from VR Services in terms of an employment outcome due to the severity of the disability.
- 9) Make the determination for eligibility or case closure within the 18-month time frame.

5.5.3 Extended Evaluation:

Under limited circumstances if an individual cannot take advantage of trial work experiences or if options for trial work experiences have been exhausted, an Extended Evaluation (EE) must be conducted to make these determinations.

In all cases where the counselor determines that an extended evaluation is required, the case record must include a Determination of Extended Evaluation completed by a



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qualified vocational rehabilitation counselor, which documents:

- A. That the individual has a physical or mental impairment which constitutes or results in a substantial impediment to employment and requires VR services, and
- B. That it is questionable if the individual is capable of benefiting from VR services in terms of an employment outcome because of the severity of the disability.

During the extended evaluation period, VR services must be provided in the most integrated setting possible, consistent with the informed choice and rehabilitation needs of the individual. There must be a written Extended Evaluation Plan for providing services necessary to make an eligibility or ineligibility determination. Only those services that are necessary to make the above determinations are to be provided and extended evaluation services are terminated when the qualified vocational rehabilitation counselor is able to make the determinations.

An individual will remain in extended evaluation only for the period of time required to determine if the individual can benefit from VR services in terms of an employment outcome but not to exceed 18 months. A review of the case shall be conducted as often as necessary but at least every 90 days.

To place individual in Extended Evaluation, VR Counselor must:

- 1) Determine that participant has a significant physical or mental impairment (disability) that is a substantial impediment (barrier) to employment.

Document in Gemini, under Disability Browse, in the Disability sub-page. Document each disability and its associated functional limitations separately under Disability Documentation and Other Comments. Gemini will number them: 1, 2, 3, etc. Please enter them in order of priority – primary will be #1, secondary #2, etc.

*Document in Gemini in Eligibility Determination using check boxes **and** the text box under #3 Impediment to Employment.*

- 2) Have questions about whether participant is capable or incapable of benefiting in terms of an employment outcome from VR services due to severity of disability.
- 3) Have conducted Trial Work Experience or determined that participant is unable to take advantage of TWE.
- 4) With participant, develop an Extended Evaluation plan to assess participants' abilities, capabilities and capacity to perform in work settings. During the Extended Evaluation, VR Services must be provided in the most integrated setting possible, consistent with the informed choice and

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rehabilitation needs of the participant. VR will only provide those services necessary to make the determination of ability to benefit.

In Gemini, do not document in #4 Documentation or put in the Eligibility date at this time. You may complete these after the EE plan if you go ahead with Eligibility determination.

- 5) Review Gemini 3, Client Rights and Responsibilities.
- 6) Assess need for Rehabilitation Technology Services, if and when necessary.
- 7) Insure that participant is an active partner, making meaningful and informed choices in the provision of Extended Evaluation.
- 8) Review the Extended Evaluation Plan at least every 90 days to assess progress.
- 9) Terminate Extended Evaluation services as soon as VR is able to make the determination of the participant's ability or inability to benefit in terms of an employment outcome.
- 10) Make the determination for eligibility or case closure within the 18-month timeframe.

5.5.4 Ineligibility:

In all instances where the counselor determines that an applicant for, or recipient of vocational rehabilitation services does not meet the requirements for eligibility, the record of services must include a determination of ineligibility, dated and signed by the counselor, which documents the reasons for the ineligibility determination. Ineligibility decisions based upon the severity of a disability must outline clear and convincing evidence and require a period of trial work experiences or extended evaluation prior to closure. (See Closure, Section 13)

On occasion an application will be completed on individual who is later determined, after the acquisition of diagnostic information, to be an appropriate candidate for Extended Sheltered Employment Services (Work Services). A Trial Work Experience (TWE) or Extended Evaluation (EE) must be conducted to provide clear and convincing evidence that the individual is incapable of benefiting in terms of employment from VR services. Once the TWE is completed and verifies the severity of the disability, the individual will be referred to the Extended Employment Services Program (EES) (See Section 12.12) for appropriate placement in a sheltered work environment and closed as "Too Severely Disabled".

It is federally mandated that IDVR monitor the closure outcome within 12 months of closure (See Section 13.1.2.D).

SECTION 6.0 THE DETERMINATION OF SIGNIFICANCE OF DISABILITY

6.1 Policy

At the time an individual is determined eligible for VR services, a VR counselor will determine the significance of the disability and, based upon the determination, will assign the individual to a priority category. If the agency is not under an Order of Selection, the prioritization will be used (1) for planning purposes to ascertain services that can continue to be provided to all who are eligible and (2) to provide a structure for an easy transition to an Order of Selection if required. If the agency is under an Order of Selection (see agency Policy), the priority categories are used to determine the order in which individuals receive services.

6.2 Definitions

Priority Categories:

- A. Individuals with no significant disabilities
- B. Individuals with significant disabilities
- C. Individuals with most significant disabilities

Disability - An individual with no significant disability:

- A. Who has a physical or mental impairment;
- B. Whose impairment constitutes or results in a substantial impediment to employment; and
- C. Who can benefit in terms of an employment outcome from the provision of vocational rehabilitation services.

Significant Disability (SD): An individual with a significant disability:

- A. Meets the criteria for an individual with a disability.
- B. Experiences a severe physical and/or mental impairment that seriously limits one or more functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome;
- C. Requires multiple vocational rehabilitation services over an extended period of time.

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Most Significant Disability (MSD): An individual with a most significant disability:

- A. Meets the criteria established for an individual with a significant disability;
and
- B. Experiences a severe physical and/or mental impairment that seriously limits two or more functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome.
- C. Requires multiple vocational rehabilitations over an extended period of time.

Note: Individuals who are beneficiaries of Social Security Disability Benefits (SSDIB) or recipients of Supplemental Security Income are automatically classified as either SD or MSD depending upon the extent of their functional category limitations.

Priority Category	Meets Definition of Significantly Disabled	Functional Loss Categories	Duration of Services	Number of Services
1. Most Significantly Disabled	Yes	2 or more	Requires VR Services over an extended period of time	Requires multiple Services
2. Significantly Disabled	Yes	1 or more	Requires VR Services over an extended period of time	Requires multiple Services
3. Disabled	No	1 or more	No duration of Service requirement	Multiple Services NOT required

6.3 Procedures

Determination of Significance of Disability

A VR counselor determines the level of severity of an individual's disability based on a review of the information gathered to determine eligibility. If additional information is necessary to make the determination, a VR counselor may obtain the information from the individual, individual's family, an outside professional and/or another public agency.

If adequate information is not available to describe or document current functioning, a VR counselor may purchase diagnostics from a qualified service provider.

A VR counselor reviews the data to determine:

- A. The number of serious functional losses present as a result of a disability;
AND
- B. Whether an individual is likely to need multiple VR services to prepare for, obtain, or maintain a job;
AND

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- C. Whether services are likely to be needed for an extended period of time. (No specific time frame for “extended period of time” is defined. The VR counselor must consider each person’s unique circumstances to determine whether the needed services can reasonably be expected to require an extended period of time. For this purpose, 6 months may be used as a general benchmark but may not be applied as an absolute limit since each individual’s circumstances must be uniquely considered.)

Identifying a Serious Functional Loss

Functional loss categories include mobility, work tolerance, communication, self-care, interpersonal skills, self-direction, and work skills. To identify a functional loss, a VR counselor reviews and assesses data provided by the individual or individual’s family, observed by the VR counselor, or reported by another qualified professional to determine whether:

- A. A functional loss resulting from a disability is present;
AND
- B. The function loss represents an impediment to employment;
AND
- C. The functional loss meets the definition of a “serious functional loss.”

A serious functional loss means a reduction in capacity of the individual to the degree that the person requires services or accommodations not typically provided to other individuals in order to prepare for, secure, or maintain a job.

A specific disability diagnosis does not automatically infer the presence of one or more functional losses. Although certain functional losses are commonly associated with specific disability diagnoses, the presence and seriousness of these functional losses are unique for each person. Therefore, a VR counselor must complete a thorough evaluation of functional losses for each individual.

Work-related limitations may result from or be compounded by external factors, such as geographic location, poor public transportation or lack of training. These factors do not relate to a disability and are not factors in determining a serious functional loss.

Self-Reported or Observed Functional Losses

A VR counselor may identify a functional loss based on a participant’s self-report, reports from the family, school representative or others, or based on counselor observations.

For example, while interviewing an applicant who is hard of hearing, a VR counselor observes that the individual is not able to effectively communicate verbally. Medical



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records clearly establish a hearing impairment, but do not address verbal limitations. Because a functional loss in verbal communication is consistent with and commonly associated with a hearing loss, the VR counselor may determine, based on his or her observations, that a serious functional loss is present. To ensure the case service record explains and supports the determination, the VR counselor enters case narrative explaining that a loss in the area of communication was observed, a summary of the observations, and how the functional loss affects the applicant.

If an individual reports a functional loss that is neither consistent with nor supported by disability-related documentation, the VR counselor and individual need to discuss and reach agreement on how to get the information necessary to verify the functional loss.

SD/MSD Checklist

Once the VR counselor determines a disability-related functional loss is present, he or she considers whether the functional loss meets the definition of a “serious functional loss” contained in the SD/MSD Checklist functional loss definitions. If the functional loss meets the definitions of a “serious functional loss” the counselor checks the appropriate indicator on the Checklist. If the individual experiences a functional loss that is not described on the SD/MSD Checklist, the VR counselor may write a description of the functional loss in the space provided.

Only one indicator within a category (mobility, work, tolerance, communication, self-care, interpersonal skills, self-direction, and work skills) is needed to determine that a serious functional loss is present in that category.

Documentation of a Functional Loss

The VR counselor documents the functional loss in the Gemini Eligibility Determination, “Section 3 - Impediment to Employment.”

The VR counselor is responsible for adequately describing:

- A. The nature of each functional loss (mobility, work tolerance, communication, self-care, interpersonal skills, self-direction, or work skills);
AND
- B. The basis for making the determination, i.e. a description of what was observed, a summary of what was reported and who reported the information, or whether the determination is based on documentation contained in medical or other information in the case service record;
AND
- C. The specific limitations experienced by the individual.

After determining the number of functional losses present, the VR counselor

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determines whether the individual is likely to require multiple services over an extended period of time. The VR counselor also considers the number of serious functional losses and impediments to employment.

Note: *No specific time frame for “extended period of time” is defined in statute or regulation. The VR counselor must consider each participant’s unique circumstances to determine whether the needed services can reasonably be expected to require an extended period of time. For this purpose, six months may be used as a general benchmark, but not applied as an absolute limit, since each individual’s circumstances must be uniquely considered.*

When the VR counselor has sufficient data to determine eligibility and significance of disability, the VR counselor completes the required documentation.

Determination of Significance of Disability Documentation

Again it is important to emphasize that in addition to case file documentation and supporting medical records, the required eligibility/significance of disability documentation must include the SD/MSD Checklist.

Remember: *The SD/MSD Checklist is a form used to support the determination; however, and is not sufficient enough documentation to adequately describe the individual’s limitations by itself.*

The VR counselor completes the SD/MSD Checklist for each individual as soon as sufficient information is available, but no later than sixty days from the date of application (unless an extension has been agreed upon). IDVR will then send a letter advising the individual of the eligibility decision.

Functional Loss Definitions

A serious limitation in a major functional area means a reduction in capacity of the individual to the degree that the person requires services or accommodations not typically made for other individuals in order to prepare for, get, or keep a job.

While limitations may result from or be compounded by external factors, such as geographic location, poor public transportation or lack of training, these factors should not be the basis of the limitation for the purpose of defining serious restriction. Defining limitations in these functional areas relies on the professional rehabilitation counselor’s interpretation of the effect of the disability on the individual as well as on medical or diagnostic evaluation data.

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Function Loss Definition Chart (SD/MSD Checklist):

AREA	SERIOUS LIMITATION	DISABILITY
COMMUNI-CATION Effective exchange ideas and information through written or spoken words.	1. Cannot hear or understand the content of ordinary spoken conversation or;	
	2. Cannot be readily understood by others on first contact; or	
	3. Cannot print or write short notes such as: Out of Order, Don't Walk; or other required survival skill messages;	
	4. Cannot read signs or short notes from others; or	
	5. Requires an interpreter for the hearing impaired, hearing aids, augmentative communication device, or other accommodation not typical to communicate in work, training or living environments.	
INTERPERSON-AL SKILLS Establish and maintain Personal working relations with others.	1. Cannot establish and maintain working relationships with co-workers, fellow students, or family members, or	
	2. Exhibits destructive behaviors such as: hitting, yelling, tantrums, sexual/racial harassment, which interfere with the performance of the individual or others in training or work settings; or	
	3. Individual avoided or rejected by co-workers or fellow students because of serious scarring, disfigurement, uncontrolled drooling, or uncontrolled motion.	
MOBILITY Move about from place to place and move the body into various positions.	1. Unable to move safely around within common training, home, or work environments without the help of others or the use of assistive devices such as: wheelchair, prosthesis, crutches, cane, or walker; or is	
	2. Significantly restricted or limited in the distance he/she can safely move within common training, home, or work environments; or	
	3. Takes significantly longer to move about within common training, home or work environments than the average person; or	
	4. Cannot safely change body positions without the help of others or the use of assistive devices; or	
	5. Requires assistive technology, modifications, adaptations, or accommodations not typical in order to move around within common training, home, or work environments.	
SELF-CARE Perform basic personal care and independent living activities	1. Requires personal assistance to perform most self-care activities; or	
	2. Requires personal assistance to perform most independent living activities; or	
	3. Is unable to obtain a driver's license due to a disability; or	
	4. Requires a special modified vehicle for travel within the community; or	
	5. Requires independent living, training, or rehabilitation technology services to perform self-care and/or independent living activities.	
SELF-DIRECTION	1. Requires ongoing personal assistance such as: prompts, cues, or physical guidance to start, finish, or stop tasks, follow schedules or decide what to do next; or	



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<p>Manage and take control Of one's personal, social and work life.</p>	2. Has recurring episodes during which personal assistance is required to start, finish, stop, or complete tasks, or follow schedules; or	
	3. Requires intensive individualized supervision or personal assistance beyond that which is typical when entering a new training or work setting; or	
	4. Requires constant monitoring by others because of confusion or disorientation; or	
	5. Requires assistive technology, compensations, adaptations, or accommodations such as: detailed calendars, appointment books, alarms, not typical for others in order to start, finish, or complete tasks, follow schedules or decide what to do next within common training or work environments.	
<p>WORK SKILLS</p> <p>Possess skills needed to perform jobs which exist in the economy (regardless of demand).</p>	1. Is unable to perform the work skills essential to maintaining employment in the previous job or line of work and does not have other work skills which could be used to enter and maintain a job comparable in skill (not wages) which is readily available locally, or in an economy to which the individual is willing to relocate; or	
	2. Has not learned the work skills usually possessed by the average person of comparable age, education, or experience which could be used in a work environment which is readily available locally or in an economy to which the individual is willing to relocate; or	
	3. Has symptoms of hallucinations, delusions, depression, obsession ruminations, time consuming obsessive/compulsive routines or medication side effects which interfere with the ability to concentrate on or complete common work, home, or school tasks at a pace comparable to that of the average person in the general population; or	
	4. Requires specialized instructional methods, extended learning periods, assistive technology, or accommodations and adaptations not typical for others students or trainees to learn work skills; or	
	5. Requires continual monitoring, skill training, behavior management, support, assistive technology or accommodations and adaptations not typical for other employees to maintain work skills and stable job performance.	
<p>WORK TOLERANCE</p> <p>Perform under the levels of physical, environmental, or psychological demands commonly found in work settings.</p>	1. Individual is unable to lift and carry a sack of groceries, 12 pack of soda pop, pail of water, or objects weighing up to 20 lbs; or	
	2. Individual is unable to sustain a continued or prolonged paced movement of the arms, hands, or fingers over the course of a typical 8 hour work day; or	
	3. Individual is unable to sustain a continued or prolonged standing or sitting position of the body required to perform the previous job or line of work over the course of a typical 8 hour day; or	
	4. Individual is unable to sustain consistent physical or mental work effort over the course of a typical 8 hour day, 5 day work week, 52 week year; or	
	5. Individual is unable to tolerate the common environmental conditions found in the typical work environment; or	
	6. Individual is unable to tolerate the common psychological stresses found in the typical work environments; or	
	7. Requires assistive technology, modifications, or accommodations not typical to meet essential strength, stamina and endurance requirements or to deal with environmental or psychological demands.	
<p>*Other causes include poverty, lack of education, environmental restrictions and age, sex, race or cultural factors.</p>		



SECTION 7.0 ASSESSMENT OF VOCATIONAL REHABILITATION NEEDS

7.1 Primary Sources of Information

To the extent possible, the vocational goal, intermediate objectives, and the nature and scope of services to be included in the Individual Plan of Employment (IPE) must be determined based on the data used for the assessment of eligibility and priority for services.

The Comprehensive Assessment to be completed prior to the development of the IPE will use, as a primary source of information, to the maximum extent possible, the following:

- A. Existing information
- B. Information provided by the individual and, where appropriate, by the family of the individual.
- C. The Assessment may also include new information acquired by IDVR including an in-house vocational evaluation; Community based Work Evaluation (CBWE), aptitude tests, interest tests, job shadowing or any pertinent medical assessment required to identify the objectives, nature and scope of VR services that the individual may need in order to substantiate the choice of employment outcome.

7.2 Comprehensive Assessment of Rehabilitation Needs

Medical History:

The development of a rehabilitation plan requires the rehabilitation counselor to understand the individual's medical requirements. To do this, the VR counselor (VRC) or the vocational rehabilitation assistant (VRA) will need to obtain any existing medical records that confirm the individual's mental and physical conditions. This often can be obtained through a primary family physician. If the VR counselor cannot determine and confirm the individual's mental and or physical limitations, the scheduling of updated diagnostics will be required. This medical information is important to determine eligibility for services and if eligible, to identify a vocational goal that will not exceed mental and/or physical capacities. This information is critical when developing an appropriate vocational goal.

Work History:

The VR counselor is required to obtain a thorough work history of the participant at the time of the intake interview. The gathering of this information requires the identification of job titles, job duties/responsibilities, and length of time in each position,



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hiring/educational requirements, and the reasons for leaving. Some attempt should be made to assess the individual's satisfaction with the job, the employer, and co-workers. Motivation and flexibility are two important variables that need to be evaluated.

Participant's Perception of Disability:

The selection of a vocational goal requires the VR counselor to understand the participant's perception of disability. This involves addressing the following areas:

- A. Physical limitations (lifting, walking, carrying, driving, stooping, reaching, handling, and bending)
- B. Mental limitations (coping with stress, working with other people, working alone)
- C. Present work tolerance
- D. Acceptance of disability
- E. Cognitive functioning
- F. Family and community support

The individual's perception is critical to know if the VR counselor is to help guide in the selection of an appropriate vocational goal. The establishment of an appropriate vocational goal requires that both the VR counselor and participant are aware and address the true barriers to employment.

Social & Economic:

It is important for the VR counselor to gather information regarding the participant's social and economic considerations to include any use of alcohol, street drugs, and tobacco. These considerations include:

- A. Values
- B. Family
- C. Service or support agencies
- D. Legal
- E. Financial

Does the individual experience any stressors with the family unit or community of friends? How does this impact his/her ability to participate in vocational rehabilitation services and what sort of influence does this have on a potential vocational goal? It is necessary to address these concerns, guide the individual in identifying solutions to



these concerns, and implement them.

Functional Limitations:

Functional limitations need to be clearly outlined before the participant begins the development of a vocational goal. In developing a vocational plan, the worker characteristics (temperaments, physical and mental requirements, environmental conditions) need to be assessed and matched to the individual's residual capacities. If they exceed the documented functional limitations, the VR counselor and the participant should never pursue a particular vocational goal unless assistive technology is available that can compensate for identified job tasks that exceed the individual's functional capacities.

Inherent Aptitudes/Transferable Skills:

The VR counselor must work with the individual in identifying existing worker traits that can be used in the development of a new vocational goal. *Too often, this is not addressed and subsequently, the success rate of the rehabilitation plans decreases.* One of the most practical ways to explore the participant's "employability goals" is to do a *transferable skills assessment*. The following skill areas are to be addressed:

- A. Adaptive skills – self-management skills and personality characteristics a person brings to the job.
- B. Functional skills – generic behaviors that deal with a person's level of skill working with data, people, and things that relate to the work environment.
- C. Specific content skills – competencies that enable an individual to perform a specific job according to the employer.

Many tools exist to assist the participant and the VR counselor to identify inherent aptitudes and transferable skills such as:

- A. Comprehensive Guidance and Counseling provided by the agency.
- B. Job Seeking Skills workshops offered by the Department of Commerce and Labor or Community Rehabilitation Programs (CRPs).
- C. Vocational Evaluations provided by CRPs either "in-house or within the community.
- D. Community based "job shadowing" experiences within the community.
- E. Career Interest Survey (CIS) studies as well as other computerized programs.

Vocational Evaluation:

Vocational evaluation is a comprehensive process that systematically uses either real or simulated work as the focal point for assessment and vocational exploration. The purpose is to assist individuals in vocational development. A vocational evaluation process incorporates medical, psychological, social, vocational, educational, cultural, and economic data. Examples of assessment include:

- A. Formal Vocational Evaluation
- B. Community Based Assessment
- C. Guidance & Counseling – Facilitated Self Discovery
- D. Labor Market Research
- E. Assistive Technology Review

Employability Development:

In the process of developing the employment goal, the participant must come to the point where a positive self-initiated resolution occurs. With this understanding in place, the individual is in a position to develop a comprehensive vocational goal and Individual Plan for Employment (IPE). The VR counselor will now assist in the development of a labor market entry strategy to identify service needs such as:

- A. Training
- B. Academic
- C. Vocational
- D. On-the-job
- E. Job Search
- F. Disability Adjustment Training
- G. Assistive Technology Training
- H. Accommodation Training
- I. Supportive Services
- J. Medical & Mental Restoration

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Vocational rehabilitation services provided under this title are any services described in an IPE necessary to assist an individual with a disability in preparing for, securing, or regaining an employment outcome that is consistent with the strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice of the individual.

The Comprehensive Assessment is limited to information to identify the rehabilitation needs of the individual and to develop the IPE of the eligible individual.

The assessment shall be conducted in the most integrated setting possible, consistent with the informed choice of the individual.

The assessment may include, to the degree needed to make a determination of vocational rehabilitation needs and develop an IPE, an analysis of the pertinent factors affecting the employment and rehabilitation needs of the individual. The following *Comprehensive Assessment Template* has been designed as a word document to be cut and pasted into a Case Note once the appropriate headings have been completed. This document is intended to be an integral part of the decision process that leads to an informed choice in the selection of a vocational goal:

- * Compatibility of Disability with Employment
- * Skills, Interests, Aptitudes and Abilities
- * Market Analysis
- * Economic Expectations and Potential for Career Growth
- * Vocational Strengths and Capacities
- * Client Financial Issues
- * Informed Client Choice
- * Social Support
- * Training and Academic Test Results

7.3 Medical Consultation Policy

Medical consultations are retained by IDVR to review all medical data gathered pertaining to an individual participant. Medical consultant time can be used to review an individual's information to determine 1) if it is complete or if updated and/or additional medical reports are necessary, 2) to train the counselor about medical conditions and 3) to assist in case management direction.

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Not every case needs to be reviewed by a medical consultant. Appropriate times to use Medical Consultants are:

- A. Eligibility determination
- B. Plan development
- C. All medical restoration services (*required*)
- D. Whenever you have a question about an individual's treatment, medications, or condition including such issues as the natural course of the disease or the most appropriate treatments.

Most IDVR offices have a medical consultant on contract that will visit on a regularly scheduled basis. A Chief Medical Consultant is on contract in order to be available in person, by phone, or electronically if you do not have a consultant or if your consultant is not available. IDVR encourages the utilization of medical consultation time in a group setting to maximize the consultant's time and to allow for an educational opportunity for VR counselors. New counselors are advised to use consultation time for most cases to become familiar with the medical aspects of disability.

When presenting a case file to the medical consultant, be prepared to:

- A. File medical information in chronological order with the most recent on top
- B. Highlight or tab important information
- C. Eliminate duplicate data
- D. Prepare a short case presentation: i.e.; age, sex, marital status, medical conditions, medications, support systems, treatments, names of treating physicians
- E. List questions for the medical consultant
- F. Use the medical consultation form
- G. Follow up on consultant suggestions
- H. Re-present the case when new information has been received.

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Medical Consultant Review Form

Name: _____

Diagnosis(es):

Is additional medical/psychological information needed for employment? Yes ☐ No ☐

If yes, describe:

Describe disability(ies): ☐ chronic ☐ acute
☐ stable ☐ progressive
☐ mild ☐ moderate ☐ severe

Prognosis:

Functional limitations:

Does client need medical/psychological care program for employment? Yes ☐ No ☐

If yes, describe:

Comments:

Medical Consultant: _____ Date: _____

State Medical Consultant: _____ Date: _____

SECTION 8.0 PARTICIPATION OF INDIVIDUALS IN COST OF SERVICES BASED ON FINANCIAL NEED

In order to obtain maximum commitment toward his/her rehabilitation program, and to conserve case service funds, each participant is to be encouraged to participate in the cost of any purchased service. Idaho Division of Vocational Rehabilitation (IDVR) will assess an individual's economic need prior to paying for services. There are two categories of services; those based upon economic need and those not based upon economic need (see lists below). For services that are based on economic need, the economic circumstances of the participant's family unit must be assessed and the ability to participate in the cost of rehabilitation services determined, prior to IDVR paying for any of these services. A Financial Needs Assessment (FNA) (Gemini 12) should be completed with the consumer on an annual basis as part of the yearly Individual Plan of Employment (IPE) Review.

VR staff needs to be aware of and emphasize to participants that substantial services can be provided at no cost. **Remember:** *If a person does not qualify for financial assistance from IDVR, there still can be a variety of substantial services provided by IDVR. Counseling and guidance, as well as coordination of services are substantial and vital services that do not require VR expenditures.*

If the individual does not qualify for financial assistance based upon the economic needs assessment s/he must pay all or part of any service based upon documented economic capacity.

All comparable benefits available to the participant must be utilized. In the case of post secondary education; a copy of the Student Aid Award Letter Report (SAR) must be in the case record and used as documentation of resources and need *prior to implementation of an IPE.*

GENERAL INSTRUCTIONS

The service delivery team (participant and VR counselor as well as significant others invited to participate by the individual) is responsible for determining the economic need for individual participants. Economic need should be tested, and the FNA form filled out during the assessment period and prior to the development of an (IPE). The following guidelines are to be used:

- A. All projected net income and liquid assets of the family unit should be considered. IDVR staff may require documentation of income or liquid assets if needed and as appropriate (copy of IRS 1040, pay stubs, Free Application for Financial Student Aid (FAFSA), SAR, etc.). Retirement accounts are not liquid. However, payments received in retirement, workers compensation payments; disability insurance payments, etc. are considered liquid income. Liquid assets can include:

- a. Money Market Funds

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- b. Cash/ Savings/ Checking Accounts
 - c. Mutual Funds (not IRAs)
 - d. Preferred and Common Stocks
 - e. Certificates of Deposit
 - f. Treasury Bills
 - g. Trust Funds
 - h. Permanent Fund Dividend
 - i. Workers Compensation, Maintenance and Care, or Personal Injury Settlements
 - j. Child Support or Alimony
 - k. Annual Corporation Dividends
 - l. Survivors Benefits
 - m. Any other source of liquid assets
- B. The family unit includes the participant, dependents or others who contribute economically to the family unit.
- C. A dependent is anyone reported as such to the IRS, or up to age 24 for students in post-secondary education or training, or as determined through the federal student financial assistance program as reported through the FAFSA and noted on the SAR.
- D. If the participant is a dependent of the family unit the entire income of the family unit should be considered, or a justifiable reason explained in the case record.
- E. If the participant is eligible for any form of Public Assistance - Temporary Assistance for Families in Idaho (TAFI), Aid for the Aged, Blind and Disabled (AABD), Supplemental Security Income (SSI), Dual recipients of SSI and SSDI, - *s/he may be considered to qualify for financial assistance based on economic need and be exempt from the mandate to participate in an FNA review..*
- F. Social Security Disability Insurance (SSDI). Recipients are not required to demonstrate need through an FNA for services.
- G. It should be made clear to the participant that it is his/her responsibility to notify the agency any time there is a substantial change that may affect economic need status. An annual review of financial need is to be completed when the IPE is reviewed. A new form is to be completed if there is a substantial change in personal resources or at least every year.

Instructions for completing the form to determine economic need are as follows:

1. **Monthly Income** –VR counselor and individual should complete the FNA for up to 12 months (depending upon the anticipated length of the services). List the net monthly take home pay (wages) for the participant. *Any consistent monthly payments* coming into the

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household via other members of the household, such as SSI, SSDI, TAFI must also be listed. VA benefits, unemployment benefits, workman's compensation, retirement, private disability, child support, etc. must also be documented. (On the FNA Gemini 12 form, circle types of income and write in monthly amounts. Add all amounts together to get Monthly Income).

2. **Available Resources** – These are items that have cash or loan value that can be used toward the rehabilitation plan. Examples of such resources include: savings, stocks and bonds, IRA's investment real estate, second homes, recreational vehicles (snowmobiles, campers, four-wheelers) investment items (jewelry, guns, art) additional cars not required for the participant or other specific members of the household in order to sustain employment. *When totaling up these available resources, IDVR will allow a \$5000 exclusion.* Add all Available Resources, subtract the \$5000 exclusion and then divide the remainder by the number of months in plan. Add this amount to the "Monthly Income" above to get the "Total Monthly Income". (If the number with exclusion is less than 0, put 0.)
3. **Monthly Expenses** – Housing (actual cost) including mortgage, rent trailer space, taxes and insurance for primary residence. Utilities (actual cost within the range of \$100-\$300 per month) including heat, electricity, sewer, trash, water, phone, (cell phone if *only* phone). If the individual's estimated utility costs are higher then outlined above, the VR counselor should ask for receipts for documentation. *Remember* to always subtract any energy assistance subsidy that may be available. Food (actual cost, up to \$150 for one person, with \$100 for each additional person) includes non-food grocery items. If participant's costs are higher because of a special diet prescribed by a doctor, or other reason, the VRC should ask for documentation and receipts. *Remember* to always subtract food stamps/subsidy amount. Miscellaneous expenses including gas, bus tickets, car payments, insurance, medications, medical expenses, clothing, child support, credit cards must also be calculated into "Monthly Expenses". *Remember* to calculate *only the minimum monthly payment* required for credit card obligations. Do not calculate the total amount owed for credit cards or other expenses unless those amounts must be paid during the time period established for the rehabilitation plan. *Remember that the taxpayer should not subsidize "choice item" costs*, so don't list them as allowable expenses on the FNA. Examples include: second homes, boats, recreational vehicles, tithing, music lessons, animals, cell phones (if not primary telephone) cable TV, etc.
4. **Total Monthly Budget Surplus or Deficit** - After calculating the total income, and total allowable expenses monthly, subtract the expenses from the income. The result will reflect the "Total Monthly Budget Surplus or Deficit".

If the participant has excess or additional resources after subtracting the deductions from the total resources, s/he must apply the excess resources to the cost of the IPE before any financial assistance for services based upon

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economic need can be provided by IDVR. If no resources are available after this calculation the participant does qualify for financial assistance.

If the participant qualifies for financial assistance any service can be paid for by IDVR, as appropriate, utilizing all available comparable benefits.

- H. Comparable benefits should be used to the maximum extent whether the participant qualifies for financial assistance or not. (See Sections 1.4.1/ or 11.1 for definition).

If the participant does not qualify for financial assistance the amount that is available must be applied toward the costs of the IPE. When these payments are made is open to negotiation. For example: If a participant has \$2000 available it is reasonable for the individual to pay for an expense over time, such as transportation or books/supplies while IDVR pays for tuition during the same time period. If, however, the participant has a small amount available, it is reasonable to expect the individual to pay the entire cost of some items at the beginning of the plan, such as books or tuition for one semester.

It is expected that payment is made by the individual to the vendor directly. IDVR may request a receipt as appropriate. The negotiated method and time frame for contribution of their share of the costs can and should be spelled out on the IPE.

If a participant has a significant amount available, such that IDVR is not paying for any of the services, the participant can still be served through assessment for eligibility and rehabilitation needs, counseling and guidance, coordination of services and job development/placement.

Services not Based on Economic Need (do not require FNA justification)

The following services may be provided without considering economic need:

- A. Counseling, guidance and referral.
- B. Diagnostic and related services to determine eligibility and services necessary to determine the nature and scope of the IPE.
- C. On-the-job training.
- D. Community assessment and work adjustment.
- E. Job site development and placement and follow-along.
- F. Assistive Technology Services.
- G. Community Supported Employment (CSE).

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H. Interpreters, Personal Care Services, Reader Services.

Services Based on Economic Need (do require FNA justification)

The following services may not be provided until economic need has been determined. If the participant does not qualify as having an economic need, these services cannot be authorized until their portion of the service is paid. If these services are developed as part of an IPE, the participant and/or family must pay them to the extent of their available resources, or use a comparable benefit.

- A. All training (except OJT)
- B. Maintenance (including clothing)
- C. Transportation
- D. Books and training supplies
- E. Tools, equipment (including computers) and supplies
- F. Physical or mental restoration services
- G. Initial stock and supplies for self-employment
- H. Assistive Technology Services (including home and vehicle modification – See Section 12.4.3 & 12.14.4)
- I. Medical care for an acute condition (inter-current illness)
- J. Services to family members
- K. Occupational licenses
- L. Any other goods or services

PURPOSE OF FNA: To determine the level of financial participation the individual will be able to assume in his/her IPE. In addition, the assessment is used as a:

- Counseling Tool
- Effective resource utilization
- Career planning
- Consistency of service provision statewide
- Counselor/participant accountability

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The FNA can be used as a counseling tool for **all** participants:

- For counseling related to the participant's level of debt and money management skills.
- eg. Should the participant be referred to professional consumer credit counseling agency?
- For career planning to determine the individual's current financial status, and ability to participate in rehab plan.
- eg. Does the participant need to go to work immediately? Can the individual afford to attend a one, two or four year training program? How will the participant and family survive economically while attending training program?
- To determine the individual's economic needs, then seeking employment with wage that will meet those needs.
- eg. What hourly wage does the participant need to earn? Does the participant need to work 40 hours per week or less? Does the participant need to purchase health insurance?
- To determine the amount of individual's participation in paying for the costs of the rehabilitation plan. The individual needs to be encouraged to participate financially in the rehabilitation plan. Regardless of whether the participant has a budget surplus or deficit, ask how much the participant can contribute financially to the cost of rehabilitation plan. The individual needs to be vested in and committed to the success of his/her rehabilitation plan.
- Financial participation by family members should always be encouraged when developing an IPE. The family's income needs to be included on the FNA for individuals under the age of 18 years, claimed as a dependent on income tax, or are under legal guardianship. Married participants need to include their spouse's income on the FNA. If extended family member expenses are included in the FNA, then their income must also be included.

SECTION 9.0 PURCHASE OF SERVICES AND SUPPLIES FOR PARTICIPANT USE IN THE VOCATIONAL REHABILITATION PROGRAM

The Rehabilitation Act of 1973, as amended, and its implementing regulations mandate procedures in the provision of services and methods of procurement. Individuals with a disability served through the vocational rehabilitation program must be actively involved in choosing the vocational rehabilitation services they receive and the entities providing those services.

Procurement authority is granted to VR counselors by the Chief of Field Services with the recommendation of their Regional Manager following a period of training and probation.

Consistent with procurement guidelines, a VR counselor cannot obligate Idaho Division of Vocational Rehabilitation (IDVR) to services that exceed his/her procurement authority. An Individual Plan of Employment (IPE) that will include a service generating an Authorization for Case Service (ACS) over \$5000 will require the Regional Manager's written approval on the IPE *prior to* the plan being approved. The rehabilitation counselor will inform the participant that the plan is pending approval during this process. An ACS purchase cannot be fragmented into multiple ACS's as a way to circumvent this approval.

All purchases in excess of \$5,000 shall be reviewed and recommended by the Regional Manager.

NOTE: *Case service expenditures require written authorization prior to the initiation of the service or the purchase of any equipment. Oral authorizations are permitted in emergency situations by the Regional Manager or designee, but must be confirmed promptly in writing and forwarded to the provider. Authorizations are to be issued within three (3) days of the beginning of the service.*

The following principles shall guide participant purchases:

- A. The IPE is the primary document that determines the scope, duration and provider of services. The individual with a disability must agree to the terms and conditions of the IPE prior to services being provided.
- B. VR counselors are required to determine the rehabilitation needs of the individual first, and then determine the provider and the procurement method. Costs, availability, success and experience providing the service and participant research are characteristics that guide the choice of the provider.
- C. The method of procurement is also determined in partnership with the individual. The agency prefers that a state Authorization for Case Services (ACS) be

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provided to the selected vendor, with an invoice from the vendor documenting the service provision. Other methods are available, given the informed choice of the individual, including reimbursement.

- D. The provision of services must be consistent with the unique strengths, resources, priorities, concerns, abilities, capabilities and informed choice of the individual.
- E. All purchased services that are evaluative and restorative shall be authorized prior to the provision of services. The agency will reimburse providers of medical services (both medical and psychological) based upon usual and customary fees for their area of specialization or based upon payment caps that have been imposed for specific services (Review Payment Policy – Section 12.2). Providers will be reimbursed at this rate independent of the participant attending the scheduled appointment.
- F. Staff will ensure fair and equitable treatment of all persons doing business with the Division.
- G. Purchases will be made consistent with the elimination and prevention of discrimination due to race, religion, color, national origin, sex, age, and disability.
- H. The responsibility for authorizing services and approving payment of those services must be assigned to separate employees. In small, sub-offices offices this control may be waived.
- I. The record of services of the individual shall contain necessary evidence and documentation of adherence to these principles.
- J. Regional Managers are the Division's field service procurement liaisons and are responsible to ensure that staff have necessary training.

SECTION 10.0 INDIVIDUALIZED PLAN FOR EMPLOYMENT (IPE)

10.1 Options for Developing the IPE

The eligible individual or, as appropriate, the individual's representative may develop all or part of the IPE:

- A. Without the assistance from Idaho Division of Vocational Rehabilitation (IDVR) or any other entity OR
- B. With assistance from:
 - a. A qualified vocational rehabilitation counselor employed by IDVR
 - b. A qualified vocational rehabilitation counselor who is not employed by IDVR
 - c. Other resources

The IPE must be agreed to and signed by the individual or, as appropriate, the individual's representative, the VR counselor and, when required, the IDVR Regional Manager.

A counseling relationship and partnership is developed between the VR counselor and the eligible individual, where options are explored and where implications of decisions are identified. It is within this partnership that the VR counselor provides support tailored to the needs of the individual, as identified in the assessment process, so s/he may make informed choices that result in successful employment. In the development of the IPE, the individual will be encouraged to make decisions based upon relevant information available. In addition, the responsibility to make decisions based upon related laws, regulations and public policy is also a requirement of the partnership between the VR counselor and the individual with a disability.

Individuals must receive the supports that will assist them in making informed choices. This is especially important for individuals with cognitive or other disabilities who require assistance in exercising informed choice.

Individuals shall promptly receive a copy of their IPE and any subsequent revisions. Copies shall be provided in the native language of the individual or through appropriate modes of communication.

The record of services must support the selection of the specific employment outcome, the objectives of the IPE and the selection of providers of services. VR goods and services may only be provided in accordance with the IPE.

It is imperative that the individual fully understand that employment means:

- a. Entering or retaining full-time, or if appropriate, part-time competitive employment in the integrated labor market, including self-employment, telecommuting or small business ownership.

- b. Community Supported Employment (CSE).

IDVR must:

- a. Reinforce the ultimate purpose of the IPE: To assist the individual to prepare for, secure, retain or regain employment.
- b. Insure that the individual fully understands that s/he must participate as an active and cooperative partner in the identification and selection of an informed vocational choice with a reasonable expectation for marketable success.
- c. Insure that the individual fully commits to participate in the implementation and completion of the IPE.

10.2 Ticket To Work

The VR Counselor/VRA must verify whether a participant receiving SSA benefits is eligible for a Ticket to Work, which can be utilized at the individual's option for vocationally-related services through a variety of vendors including IDVR. In order for IDVR to be eligible to request reimbursement at a later date for services provided that result in a successful employment outcome, the counselor or VRA must acquire the Ticket concurrently with the development of the initial IPE and complete the assignment of the Ticket to the agency as verified within the Ticket to Work Gemini module.

Once the Ticket to Work Gemini module is completed, it is printed and a participant signature is secured. The document is subsequently faxed (703-683-3289) to Maximus, the SSA contractee that administers the program. Maximus then sends to Central Office a letter verifying the start date for the Ticket assignment. The original letter is sent to the appropriate field office for filing within the case.

At Closure "Other", the VR Counselor/VRA will go to Gemini "Reports" – "Participant Letters" and select the "Unassignment of Ticket to Work" letter, print and complete it and then fax the document to Maximus.

At "Successful Closure", there is no requirement to contact Maximus. The Fiscal Unit at Central Office will monitor those cases that have achieved a "Substantial Gainful Activity" level of employment for 9 months and will subsequently submit employment verification to the appropriate region for verification of sustained successful employment. Once the verification is returned from the field with verified employment a service reimbursement request will be submitted to SSA.

10.3 Annual Review

The IPE must be reviewed annually by a qualified VR counselor and the individual to assess the eligible individual's progress in achieving the identified employment outcome.

10.4 The IPE must include the following:

- A. Using the information from the Comprehensive Assessment (Section 7.2) the VR counselor and individual must determine a specific employment outcome consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, career interests and informed choice. In concert with the individual, the VR counselor must conduct a thorough market analysis to include job outlook and the individual's economic expectations and needs. *The goal is for the individual to become self-sufficient and self-supporting, if possible and the provision of planned services on the IPE should only entail those required to achieve the targeted vocational goal.*
- B. The specific rehabilitation services needed to achieve the employment outcome along with the projected dates for initiation and anticipated duration of each service, including:
 - a. As appropriate, assistive technology devices, assistive technology services and personal assistance services including training in the management of those services;
 - b. As provided in the most integrated setting that is appropriate for the services and is consistent with the informed choice of the eligible individual;
 - c. Timelines for the achievement of the employment outcome and for the initiation of services;
 - d. A description of the entity or entities chosen by the eligible individual or, as appropriate, the individual's representative that will provide the vocational rehabilitation services and the methods to procure those services;
 - e. A description of the criteria ("Plan Documentation") that will be used to evaluate progress toward achievement of the employment outcome;
 - f. The terms and conditions of the IPE, will include information describing the responsibilities of IDVR and the individual to achieve the employment outcome;
 - g. The extent of the individual's participation in paying for the costs of services;
 - h. The individual is required to apply for and secure comparable services and benefits when available. The responsibilities of other comparable service and benefit entities will be listed on the IPE;
 - i. As necessary, the expected need for post-employment services prior to the point of successful closure (Review Post-Employment - Section 12.13);
 - j. A description of the terms, conditions, and duration of the provision of post-employment services;

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- k. If appropriate, a statement of how post-employment services will be provided or arranged through other entities as the result of arrangements made pursuant to comparable services or benefits;
- l. Supported Employment - for individuals with the most severe disabilities for whom a vocational objective of supported employment has been determined appropriate, the following must be addressed:
 - i. a description of time-limited services to be provided by IDVR not to exceed 18 months in duration, unless under special circumstances, the eligible individual and the VR counselor jointly agree to extend the time to achieve the employment outcome;
 - ii. a description of an identified source of funding for the extended services needed (long-term support). If it is not possible to identify the source of such funding, a statement that there is a reasonable expectation that extended services will be available. *Extended services are provided by a State agency, a private nonprofit organization, employer, or other appropriate resource, from funds other than IDVR.*
 - iii. a description that the employment is competitive and available in an integrated setting. Verification of a "minimum wage" (State of Idaho Minimum Hourly Wage) must be documented.
- m. In developing an IPE for a student with a disability, the IPE shall be prepared in coordination with the appropriate educational agency and will consider the student's Individual Educational Plan (IEP) if one exists;
- n. The current IPE will be reviewed with the individual as often as necessary but at least annually to assess the individual's progress in meeting the objectives on the IPE.
- o. Completion of the IPE for all School-Work transition participants *before they exit the school system.*

NOTE: *Because of the capability of the Gemini Case Management tool, with the ability to clone plans, write new plans, edit features and delete completed services, there will be only **one active plan**, which is the current plan with all current services reflected on it. When the current plan is signed and approved by the individual and approving authority (counselor or supervisor) all previous plans will become void and only the signature pages of those previous plans should be retained in the hard copy file.*

10.3.1 Implementation of the IPE

Assurance that the IPE is developed and implemented in a timely manner, within 6 months of the eligibility decision. *An exception may be made and must be documented in a case note, if this timeframe will be exceeded due to the needs of the individual participant.* Documentation should include participant readiness, availability, inability to



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complete a comprehensive assessment, as well as unforeseen delays outside the control of the individual, VR counselor, or Regional Manager.

10.5 Plan Features in Gemini

New Plan: A new plan is completed when an original plan is initiated or the nature of the IPE is changed. This would occur when a new vocational goal is chosen and there are major changes in the planned services. Remember: with the development of a new plan the VR counselor and participant will need to include all needed services and complete all the pertinent comparable benefit documentation outlined in Section 11.3.

Clone: The clone feature is to be used when the basic nature of the plan is going to remain the same. This feature brings forward a full copy of the previous IPE and allows the VR counselor and participant to add new services. New services will be given new service numbers when they are added to the clone. It is important to add new services before deleting previous services from the plan that have been completed or expired. This keeps service numbers 1-2-3... in numerical order and allows for subsequent services to be numbered appropriately. Justification for the new services must be documented in the comments section of the Plan sub-page. If the *goal is changed without the need to modify services*, the IPE can be cloned. Change the goal and update the comprehensive assessment in a case note to justify vocational change. When adding new or expanded services to a clone, *always update the justification in the "documentation" box*. It is not necessary to clone the plan each time the price of a service outlined on a plan increases. This can be accommodated through the authorization showing the increased costs.

Edit: The edit function may only be used to change a vendor or to edit the documentation on a previously signed and approved plan. The edit function is not to be used to add a new service to an existing plan. The edit function may be used prior to closure to insure that the employment outcome on the last plan is in the same or related field as the employment outcome at closure since this is a federal requirement. When editing the employment outcome, it is essential that the VR counselor document how the substantial services provided on the edited IPE support the final employment outcome and that the participant fully agree with the modified goal. All VR counselors and support staff can edit plans since edits do not require signatures.

SUMMARY:

NEW Plan: is always implemented for a new vocational goal when major changes in services are necessary.

CLONED Plan: is implemented when new services are added or additional services are needed to fulfill the objectives of a previous plan. A clone may also be implemented when the vocational goal is modified without changing the planned services.

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EDIT: is used to change a vendor or edit the documentation on a previously signed and approved plan.

Plan Approval Authority: VR counselors 1 and 2 who have not been given permission to sign their own plans will continue to require Regional Managers (RM) approval for all plans. RMs can, at their discretion, delegate this function to an Assistant Regional Manager (ARM) or other senior counselors 2 or 3.

10.6 “4x 4” Service Policy:

Revisions shall be completed when a significant change occurs in the IPE. Revised IPEs (clones or new plans) shall be in writing and shall not take effect until agreed to and signed by the individual. The IPE is amended as necessary by the individual and the VR counselor if there is a substantial change in the employment outcome, VR services or providers of VR services. *Amendments are not necessary, however, under the following very limited and specific circumstances:*

1. The additional service *must not exceed \$400.*
2. The additional service *must not exceed four months in duration.*
3. The employment goal *must remain the same* as on the previously written plan.
4. The *additional service* will be provided on a *one-time basis per case*. This restriction is intended to prevent the ongoing provision of a specific service, e.g., transportation, beyond the four-month time limit or \$400 maximum allowance.
5. It is imperative that a *Case Note* be completed to document that the individual is in full agreement with the provision of the additional service provided by this protocol in order to show full awareness and agreement by the individual

Note: *VR counselors who currently do not have permission to sign plans will be exempt from participating in this protocol.*

Through the implementation of this policy, the VR counselor can continue to provide services in a seamless manner without having to interrupt a program by preparing and implementing an IPE for services with a minimal associated cost that are intended to support an ongoing vocational goal.

SECTION 11.0 COMPARABLE SERVICES AND BENEFITS

11.1 Comparable Services and Benefits

Each eligible individual will be required to review with the VR counselor all potential comparable benefits that may be available prior to the development of the Individual Plan of Employment (IPE). If comparable benefits and services are available, they *MUST* be utilized to meet, in whole or in part, the cost of vocational rehabilitation services. Comparable benefits and services should be utilized before Idaho Division of Vocational Rehabilitation (IDVR) agency funds are expended.

The definition of Comparable Benefits and Services is any benefit or service that exists under any program that is available to the participant during the duration of the IPE and which can be directly applied to the individual's progress toward the achievement of the employment outcome.

Federal regulations require that VR and the participant must utilize all comparable benefits or services. This means that the individual must apply for any comparable benefit or service that could be available during the time sequence outlined in the IPE.

The utilization of comparable services and benefits does not apply in the following situations:

- A. If the determination of the availability would delay the provision of vocational rehabilitation to any individual who is at extreme medical risk. A determination of extreme medical risk shall be based upon medical documentation provided by an appropriate licensed medical professional and means a risk of substantially increasing functional impairment or risk of death if medical services are not provided expeditiously. It is strongly recommended that such cases receive medical consultation review whenever possible.
- B. If an immediate job placement would be lost due to a delay in the provision of comparable benefits.

11.2 Comparable Services and Benefits Exceptions

The following categories of service are exceptions to the requirement that comparable services and benefits be utilized:

- A. Medical, psychological or other examination to determine eligibility.
- B. IDVR counseling, guidance, information and referral and IDVR placement services.
- C. Evaluation of vocational rehabilitation potential.

- D. Rehabilitation technology, including telecommunications, sensory, and other technological aids and devices (see Section 12.14 for exceptions)

11.3 Timeliness of Comparable Benefits

If a comparable benefit exists, but is not available to the individual at the time needed to satisfy the rehabilitation objectives of the IPE, IDVR may provide the services until the comparable benefits become available. For example: In a post secondary education plan, IDVR may provide the first semester costs only in those circumstances where the comparable benefit such as the Pell Grant has yet to be determined in spite of appropriate Financial Assistance (FAFSA) preparation in advance by the individual. *Subsequent semester costs will only be authorized upon receipt and consideration of the full FAFSA award(s).* An IPE should reflect this exception. *A copy of the financial award or denial letter should always be placed in the individual's file before any authorizations are issued. If the financial aid has been determined but has not arrived at the institution, the individual should pursue a short-term loan to cover costs until the financial aid is received. VR should not pay for tuition if the individual has been verified as eligible for a financial grant.*

IDVR requires individual's to apply for Federal Financial Aid (Pell Grant, Supplemental Educational Opportunity Grant (SEOG) State Incentive Grant (SSIG) Leveraging Educational Assistance Partnership (LEAP) Grant and other grants) that are designed to pay for training costs, i.e., tuition fees, books and supplies, tools, etc. at any institution of higher education. VR cannot pay for such training costs unless maximum effort has been made to secure grant assistance. **This means that the individual must make repayment arrangements if s/he has previously defaulted on a loan and owes a refund on a grant before IDVR will support a training program where financial aid is available.**

SECTION 12.0 VOCATIONAL REHABILITATION SERVICES

12.1 Guiding Principles of Informed Choice

- A. All people with disabilities can achieve competitive, high quality employment in an integrated setting and can live full productive lives.
- B. People with disabilities often experience major barriers related to the low expectations of, and misunderstandings toward, people with disabilities that exists within society, within the persons with disabilities themselves, and sometimes, within our own rehabilitation system.
- C. People with disabilities should have responsibility and accountability to make their own choices about their lives; the kind of employment they want to pursue, who they want to provide services for them as well as the kind of services they need.
- D. The primary purpose and role of the public rehabilitation system is to empower individuals with disabilities by providing them with information, education, training, and confidence, in order that they will make the right choices responsibly if appropriately informed. It is also the purpose of the public rehabilitation system to support those choices when they are based upon reasonable and verifiable premises.
- E. The most effective rehabilitation occurs when there are true partnerships between the federal and state partners, state agency providers, community providers and employers, the disability community, all other partners, and the consumer.

The ultimate goal is to provide participants with skills, tools and information to aid in their vocational discovery process and to initiate informed choices when creating their Individual Plan for Employment (IPE) with the Vocational Rehabilitation Counselor (VRC).

Many tools exist to assist the participant and the counselor to identify inherent strengths, interest, aptitudes and transferable skills such as:

- A. Comprehensive Guidance and Counseling provided by the agency.
- B. Job Seeking Skills workshops offered by the Department of Commerce and Labor or Community Rehabilitation Programs (CRPs).
- C. Vocational Evaluations provided by CRPs either “in-house or within the community.
- D. Community Based “job shadowing” experiences within the community.
- E. Career Interest Survey (CIS) studies as well as other computerized programs.

Developing the Vocational Goal:

In selecting a vocational goal, it is important that the participant is actively involved in all phases of this development. Much research has been done to substantiate that the successful outcome of vocational rehabilitation increases when the participant is involved in every phase of the vocational planning. Vocational planning is built around vocational exploration, understanding the participant's medical and work history, his/her perception of disability, social habits, functional limitations, inherent aptitudes and transferable skills, vocational exploration through vocational evaluation, training options, and labor market research. The participant will explore the relationship of vocational objectives around his or her personal capabilities, interest, and situations and then attempt to understand the way these different factors impact and influence vocational potential. This information then helps the participant to develop the steps to a solid rehabilitation plan, and provides tools for the participant to assess his/her current state of mind and to encourage positive self initiated resolutions.

12.2 Agency Payment Policy

NOTE: Many of the services listed below include *maximum agency contributions*. This section outlines in detail the payment policy of Idaho Division of Vocational Rehabilitation (IDVR) in regard to specific services. It is the policy of IDVR to pay usual, customary and reasonable charges for services provided to its participants by providers of goods and services except for the following list. An "Exception Policy" clause is attached at the completion of this list explaining that the payment caps established may, on occasion, be exceeded for geographical or other considerations.

It is important to emphasize that IDVR is not obligated to pay the total cost of services required to ensure that a participant achieves an employment outcome. The individual is always strongly encouraged as well as responsible for the pursuit and identification of comparable benefits. Personal participation in the payment of some portion of the costs of a vocational plan may be required based upon the particular service selected as well as the identification of personal resources that could be applied toward the cost of the targeted services.

Rates of Payment:

These fees are established in accordance with federal guidelines that permit an agency to establish fee limits for services designed to ensure a reasonable cost to the program for each service.

Whenever possible, a competitive process will be used to achieve a reasonable price. Idaho is a low bid State; therefore, the lowest bid will then be the maximum amount IDVR will contribute to the purchase of goods or services. The Payment Policy will determine the maximum that IDVR will contribute to the purchase. For items not included in the payment policy, the usual, customary and reasonable rate will be used

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for the service, not to exceed the rate charged other public agencies. The service that will meet the individual's need at the least cost to IDVR shall be the service purchased.

All decisions on cases, including fee for services, are determined on an individual case basis. The individual may choose his or her preferred vendor, but if s/he chooses a product or vendor that exceeds the maximum rate of payment established by the Payment Policy, the participant will be responsible for the excess amount.

Exceptions to Usual, Customary and Reasonable Charges:

1. **When training is being proposed for any institution that is eligible for PELL Grant funding**, the individual must complete the requisite application documents and receive a determination decision prior to any IDVR financial participation. Exceptions to this policy must be approved and reviewed by the Chief of Field Services.
2. **IDVR adheres to the same standards as the federal financial aid rate** (PELL and all other grants). For example:
 - a. VR Maximum per semester for full time (12+ credits) - \$1650
 - b. VR Maximum per semester for $\frac{3}{4}$ time (9-11 credits) - \$1237.50
 - c. VR Maximum per semester for $\frac{1}{2}$ time (6-8 credits) - \$825
3. **Idaho public in-state colleges**, vocational technical schools, universities, and other education and training Institutions' education expenses (fees and tuition, including health insurance fees) are established as follows:

Maximum:

\$1650 per semester x 2 per year (\$3300 max per federal fiscal year)

\$1100 per quarter x 3 per year (\$3300 max per federal fiscal year)

If the participant receives a Pell Grant, it must be applied first for tuition or fees. VR may pay the difference up to the \$3300 per year maximum.

These yearly maximums include summer school.

The following *Exceptions* must be reviewed and approved by the Regional Manager (RM) for VR Counselors 1, 2, & 3)

- a. VR may pay for summer school if it is a required part of a Vocational or Technical Program, e.g. Welding – 5 sessions per year.
- b. VR may pay for academic summer school if by attending the individual will be able to finish the final semester and not have to attend in the fall.



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- c. VR may pay for summer school in exceptional cases where a disability-related reasonable accommodation is verified.

- 4. **Idaho private in-state colleges**, vocational technical schools, universities, and other education and training institutions, education expenses (fees and tuition, including health insurance fees) are established as follows:

Maximum:

VR may pay up to \$3300 per federal fiscal year for any in state training, public or private.

If the participant receives a Pell Grant, it must be applied first for tuition or fees. VR may pay the difference up to the \$3300 per year maximum.

- 5. **Out-of-state colleges**, universities, vocational technical schools and other education and training Institutions.
 - a. If the participant must attend an out-of-state institution because the course of study is not offered within the state of Idaho then IDVR can pay the “usual and customary” charges for fees and tuition.
 - b. If the course of study is offered in-state, but because of the additional costs caused by the accommodation for disability, it would be more cost effective for the agency to support the attendance of the individual at an out of state educational institute, then VR may pay the usual and customary tuition charges for the out of state educational institution.
 - c. If the individual chooses to attend an out-of-state institution, when comparable training is clearly available in the state, then IDVR will only pay the Idaho in-state maximum cost (fees and tuition) currently established at:

Maximum:

\$1650 per semester x 2 per year (\$3300 max per federal fiscal year)

\$1100 per quarter x 3 per year (\$3300 max per federal fiscal year)

These yearly maximums include summer school.

These maximum fee allowances provided by IDVR apply to all training and educational costs including truck driving, cosmetology, short-term computer training, commercial airline pilot training, etc.

- 6. **Books Only**

Maximum:

\$300 per semester x 2 per year (\$600 maximum per federal fiscal year)

\$200 per quarter x 3 per year (\$600 maximum per federal fiscal year)

For Vo-Tech programs, where most of the books are required at the beginning of the



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first semester, VR can issue for required books not to exceed \$600 per federal fiscal year.

These yearly maximums include summer school.

7. Medical exams with written report:

Specialist exam by M.D. - \$200 maximum, plus actual cost of related procedures (e.g. x-rays).

a. Psychological exam by Licensed Psychologist - \$200 maximum plus actual cost of psychometric tests.

b. Ophthalmologist/Optometrists:

Maximum fees are established for general visual exam, accompanying test, frames and glasses. Tinted glasses require a prescription for IDVR payment. The specialist fee for an ophthalmologist will be authorized when diseases of the eye are present and cannot be dealt with by an optometrist.

Procedure	Fee
Visual Exam	\$85
Frames	\$85
Single Vision Lenses (per pair)	\$80
Bifocal Lenses (per pair)	\$100
Trifocal Lenses (per pair)	\$125

c. Contact Lenses – contacts cannot be purchased for clients unless there is documentation by an ophthalmologist or optometrist that there is a need.

d. Audiologist exam - \$85 maximum

8. Physical exam (GBM) - \$65 maximum

9. Psychotherapy/Counseling Sessions: Maximum: 10 sessions

10. Medication:

Maximum: 3 months, while participant applies for reduced cost or fee medication programs provided by drug companies or other sources of comparable benefits.

11. Dental Work, including but not limited to cleaning, fillings, extractions, crowns, and dentures.

Maximum: \$500 per case

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12. Hearing Aids:

Maximum: \$1,000 per hearing aid. Cost must include insurance for free replacements for one year.

13. Transportation:

- a. Public conveyance (bus, van) - actual cost.
- b. Private vehicle not to exceed \$60 maximum within a 20 mile radius in-town commuting, or \$200 maximum out-of-town commuting per month.

14. Car Repairs:

Maximum: \$300 per case (except for cost of reasonable accommodation for disability).

15. Maintenance:

Maintenance means monetary support provided to an individual for expenses, such as food, shelter, and clothing, that are in excess of the normal expenses of the individual and that are necessitated by the individual's participation in an assessment for determining eligibility and vocational rehabilitation needs or the individual's receipt of vocational rehabilitation services under an individualized plan for employment (IPE). (Ref: 34 CFR Part 361.5 (35).)

NOTE: Counselors cannot pay maintenance for those existing living costs that an individual would normally incur regardless of the individual's participation in a plan of vocational rehabilitation services.

Maximum: \$1,500 total per federal fiscal year. No single monthly amount to exceed \$500. No limit on number of months up to the \$1,500 maximum.

These maximums also apply to rent and room & board for post secondary education.

NOTE: If the individual receives SSI or SSDI, VR cannot provide maintenance for basic living expenses.

16. Copy Fees

Maximum: \$15 for copy of report.

17. Community Rehabilitation Programs (CRPs) (IDVR PM 2006-02)

- a. Maximum daily rate for in-house work evaluation, work adjustment \$66.25/day). (Exception: in-house evaluation may be paid at an hourly rate if reasonable justification, e.g. individual disability needs, delays in services).

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- b. Certain CRPs have developed a comparable cost service for in house diagnostics based upon the hourly rate. Those services can be utilized at will without justifying an exceptional cause. Please consult with the Regional Manager for a list of comparable hourly rate service providers.
- c. Maximum hourly rate for Community Based Work Evaluation (CBWE), Community Based Work Adjustment (CBWA), Placement & Follow Along (P&F), Job Seeking Development (JSD) and McCarron Dial evaluation - \$44.60/hour.

Services purchased from CRPs are not subject to the allowable maximum for training and educational expenses.

18. Tools & Equipment

Maximum: \$1,300 per case. Agency inventory tools and equipment will count towards the \$1,300 maximum. *The VR counselor must always negotiate in the best interest of the agency on cost of services and must get three bids, if vendors are available, on all durable equipment (reusable) valued at \$300 or more.*

Exception: If there is a change in employment outcome, the individual must return the original tools to VR. After the tools have been returned, then VR may purchase new tools up to the \$1,300 maximum for the new employment outcome.

NOTE: *A Property Agreement must be secured on all durable equipment or reusable supplies that exceed \$150 in value.*

19. On-The-Job (OJT) Fees

Maximum: \$3,000

- a. The VR counselor must negotiate OJT fees based on:
 - 1. Employer's cost to train the individual
 - 2. Level of technical skills required for job
- b. The Individualized Plan of Employment (IPE) and OJT Agreement (Gemini 15) must include:
 - 1. Cost of training
 - 2. Length of time (# of months)

VR counselors are strongly encouraged to negotiate a decreasing payment schedule with the employer.

To exceed the \$3,000 maximum, the VR counselor must consult with Regional Manager. (Please review additional information regarding OJT outlined in Section 12).

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20. Computers including hardware and software:

Maximum: \$1,000 per case, except for disability-related reasonable accommodation.

Most post-secondary training institutions have computer labs available for student use and this is covered in the cost of tuition and fees.

21. Self-Employment Plans

Maximum IDVR financial support for supplemental self-employment plans: \$3,500

Any special circumstances on computers and tools on self-employment plans will be discussed with the appropriate Field Services Manager.

Please review self-employment policy, section 12.9 for full details regarding the IDVR agency policy.

22. Child Care: Maximum: \$300 per child per month.

Use the Health & Welfare Child Care Funding as a comparable benefit before expending VR funds. The VR counselor should carefully explore all comparable benefits that may be available including assistance from family and friends.

23. Kidney Services Only

Kidney services provided to individuals with ESRD will be the same for PSK participants and general VR participants with a diagnosis of ESRD. (See Section 14 Pure State Kidney – PSK)

24. Private/Commercial Pilot's License:

The Division does not assist with the procurement of a private pilot license since there is no occupational outcome associated with such licensure. The agency may assist with the acquisition of a commercial pilot license.

25. Reimbursements for Fines:

IDVR will not reimburse (or pay restitution) for illegal behaviors - whether traffic violations or other misdemeanors. It is never appropriate for the agency to utilize tax supported funds to offset personal liability and accountability for a violation of the law.

26. Advanced Degree:

IDVR may assist with an advanced degree, based upon the rehabilitation needs of the individual participant. (See section 12.5.4).

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27. Typical exclusions from VR financial participation:

- a. Vehicular purchase; however, IDVR may assist to modify an already owned vehicle to make it accessible for the Individual's usage (e.g. hand controls, van conversions, and lift installation). (see section 12.19 "Reserve Fund")
 1. The cost of the modification cannot exceed the current Blue Book value of the vehicle.
 2. The individual must maintain insurance on the vehicle for replacement cost.
 3. VR encourages the use of loans from the Idaho Assistive Technology Project and Independent Living Centers.
- b. Securing a private pilot's license. (see #24 above)
- c. Organ transplantation, other than kidney transplants.
- d. Physical and Mental Restoration Services. Surgery may be provided if it is not the sole vocational rehabilitation service needed for the participant to return to work or to achieve an employment outcome.

IDVR will only cover the cost of surgery if it will substantially reduce functional limitations. It is highly practical and appropriate for the VR counselor to explore alternative employment opportunities with the individual that may negate the need for the corrective surgery. Such an alternative should accommodate the individual's functional restrictions and provide a level of income that would be comparable with potential earnings following a surgery. The participant should always explore in cooperation with the VR counselor a variety of options in order to be prepared to make an informed choice.

NOTE: *When physical restoration services for individuals who have a temporary disability, which will be eliminated by surgical care in an acute general hospital, is the only vocational rehabilitation service to be provided, and the condition is likely to be remedied by relatively routine medical intervention with no significant lasting effects, the RSA position is that such cases should be referred to other agencies. Such services should not be paid for under vocational rehabilitation auspices. – (RSA Position Paper, 3/28/80, Robert R. Humphreys, Commissioner of RSA)*

28. No Shows:

If an individual does not attend an appointment and doesn't cancel or reschedule, the individual will be responsible for payment of any charges - not VR.

If VR authorizes for an interpreter to be present and individual does not attend, VR will cover cost of the interpreter through administrative authorization.

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Exception Policy:

The Rehabilitation Act of 1973, as amended, requires that IDVR have a policy that allows for exceptions to the Payment Policy, unless the exception would violate State or Federal laws. All exceptions will be reviewed on an individual case basis, and require approval by the appropriate Field Services Manager in charge of the zone from which the request originated.

Exception Process:

To be considered for an exception, the individual and VR counselor should first seek approval from the Regional Manager. The Regional Manager shall submit the request for the exception in writing to the Field Services Manager. The request must include:

1. A description of the requested exception.
2. Detailed reasons why the individual, VR counselor and manager believe the exception is warranted.

The Field Services Manager will have ten (10) days from the date of receipt of the request to make a decision. The VR counselor should be careful to explain to the participant prior to submission that just because s/he requests an exception does not guarantee that it will be approved. If the request is approved, written notification will be sent to the Regional Manager and this will be placed in the case file.

The Field Services Manager reserves the right to deny any request.

If a request for exception is denied, the individual must be informed of the reason why and of his/her right to appeal the decision within ten (10) days of notification of the denial.

Reasons for Exception:

The items listed below are not all inclusive, but do contain the major reasons that will be considered in determining if an exception to policy will be granted. Financial need alone is not always sufficient grounds for asking for an exception. While an individual may present one or more of these reasons for an exception, VR counselors should use discretion in requesting an exception. It is sometimes the nature and scope of the reason and not the number of reasons that may justify the exception.

1. The need is disability related.
2. The participant has used all sources available; including his/her own financial contribution, as well as all available Federal Financial Aid in post-secondary training situations, insurance, Medicaid, Medicare and other resources typically used by persons without disabilities.



3. Family issues such as legal separation, divorce or loss of income make resources unavailable.
4. Service is not available in certain geographical locations of the state within the Payment Policy maximums.

12.3 Counseling, Guidance, and Work-Related Placement Services for Individuals with Disabilities, including Rehabilitation Services that address Disability related Barriers to Employment, Job Search Assistance, Placement Assistance, Job Retention Services, and Follow-up

Idaho Division of Vocational Rehabilitation (IDVR) recognizes that vocational counseling and guidance is the key element in the rehabilitation process in that it is the method of involving the participant and significant others in that process. It begins when the individual contacts the agency and does not end until closure as successfully rehabilitated or through to the completion of the post-employment period.

Vocational counseling and guidance, including referral and placement, are essential VR services provided by the VR counselor throughout the rehabilitation process. This is the *primary service* in the VR plan.

Counseling, guidance and placement should be an integral part of every IPE regardless of other services because it is the best method of coordinating services and maintaining a good working relationship with the participant. This is also the medium used by the counselor to facilitate participant input. The VR counselor gathers the necessary information for providing vocational counseling and guidance services from a wide variety of sources, including, but not limited to:

- A. Medical and psychological information.
- B. Vocational evaluation information including labor market information, job analysis, aptitude and interest information, situational assessments and trial work experiences.
- C. Analysis of transferable skills.
- D. Rehabilitation technology, including rehabilitation engineering.

Counseling will address vocational and personal adjustment issues that are creating barriers to the participant obtaining and maintaining employment.

Counseling will be provided in a respectful manner encompassing the core conditions of helping. These will include unconditional positive regard, genuineness and congruence. Counselors will always maintain a professional demeanor and not allow counseling



issues to become personal. Counselors are to follow the canons of ethical behavior and practice outlined by the Commission on Rehabilitation Counselor Certification (CRCC) Code of Ethics.

Counseling services must be provided in every case but will vary depending on the needs and complexities of each individual participant. Frequency of guidance and counseling contacts is determined at plan development and included on the IPE. Case notes will reflect contact and content of meetings. *A monthly summary of guidance and counseling activities is the agency "best practice" norm for recording progress.*

12.4 Physical and Mental Restoration Services

These are services *necessary* to correct or to modify substantially a physical or mental condition of an individual that is stable or slowly progressive. *Before medical restoration is provided, there must be documentation that the clinical status of the individual is stable or slowly progressive and the service is a requirement for the individual's successful employment. The medical consultant shall review the record to insure the adequacy of medical information, advise on the service requirement, educate the counselor on the procedure and required follow-up, and provide any necessary liaison with the medical community.*

Remember: IDVR may provide physical and mental restoration services, to the extent that financial aid is not available from a source such as personal health insurance or comparable services/benefits such as Medicaid or Medicare. (See Section 12.2, Subcategory #25 "Typical Exclusions" "e. Physical and Mental Restoration Services").

Current maximum financial contributions by IDVR for *italicized services* can be found in the "Payment Policy" section 12.2 of the Manual. For all other services listed below, IDVR will pay the prevailing "Usual and Customary" charges after a comprehensive assessment of potential or available comparable benefits and resources has been conducted.

12.4.1 Concurrent Illness Service: Services necessary to assist with acute treatment or care for a condition arising during rehabilitation and constituting a barrier to achievement of an employment outcome. Comparable benefits will always be explored prior to authorization of this service. *The medical consultant should always be utilized to determine the medical rationale for such services.*

12.4.2 Prosthetics/Orthotic Devices: When the agency purchases an assistive technology device, such as hearing aides, prosthetic/orthotic equipment it is important that the counselor stipulate on the IPE the personal financial responsibility that the individual must assume for maintenance and future modification or replacement needs. Guidance should be provided in assisting the individual to understand the need for budgeting finances for that specific purpose.

12.5 Vocational and other training services, including:

12.5.1 Disability related services and on-the-job supports.

Disability related services – include, but are not limited to, orientation and mobility; rehabilitation technology; speech reading; sign language; and cognitive training/retaining.

On-the-job-supports – support services provided to an individual who has been placed in employment in order to stabilize the placement and enhance job retention. Such services include job coaching, follow-up and follow-along, and job retention services.

12.5.2 Post-Secondary Training - if comparable programs exist at both public and private schools, IDVR will pay a limited amount up to the amount of the tuition cap set for the public-supported program.

Post-Secondary training is provided when necessary to achieve an employment objective that reflects the individual's interests and informed choice to the extent that those factors are consistent with an individual's strengths, resources, priorities, concerns, capabilities and abilities. IDVR may support graduate study when the individual's employment objective is otherwise unachievable.

Prior to providing post-secondary training, comparable benefits shall be determined. The individual is required to complete and submit for processing the Free Application for Federal Student Assistance (FAFSA). The resulting Student Aid Report (SAR) and Financial Aid Award Letter will determine the federal grant awards available that are to be applied to tuition, books and fees. Proof of financial award status *is required to be placed* into the record of services for all individuals sponsored in post secondary education by IDVR. Examples of proof include the SAR, Financial Aid Award Letter or Post Secondary Institution Student Budget, Compromise and Release documents from Worker's Compensation.

All Federal (PELL, SEOG, SSIG, LEAP) and Native Corporation Grants are to be applied to tuition, books and fees as a 1st dollar source, prior to the consideration of expenditures of IDVR funds. Merit based funding may be applied to any legitimate college costs as determined by the individual, with no comparable benefit test required.

Shared funding will be negotiated with federal, state or local partner agencies (VA, WIA, Tribal Vocational Rehabilitation, Worker's Compensation, etc.) to carry out a joint vocational plan to provide services to individuals.

The FAFSA Expected Family Contribution, Student Contribution, Work Study and other grants must be considered in meeting the financial needs of the individual's post secondary education to the maximum extent possible.

Participants are required to make application for FAFSA whether or not they believe



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they are eligible for funding. *This process should occur along with the verification of determination of eligibility/ineligibility for financial aid prior to IDVR developing an Individualized Plan of Employment (IPE) and participating in financial assistance for a post-secondary education.*

12.5.3 Out of State Training

Out-of-State Colleges, Universities, Vocational Technical Schools and Other Education and Training Institutions.

- a. If the VR client must attend an out-of-state institution because the course of study is not offered within the state of Idaho then VR can pay the “usual and customary” charges for fees and tuition.
- b. If the course of study is offered in-state, but because of the additional costs caused by the accommodation for disability, it would be more cost effective for the agency to have the client attend the out of state educational institute, then VR may pay the usual and customary tuition charges for the out of state educational institution.

This must be addressed by the VRC in the interest of informed client choice in the initial vocational guidance and counseling.

- c. If the client chooses to attend an out-of-state institution when comparable training is clearly available in the state, then VR will only pay the Idaho in-state maximum cost (fees and tuition).

12.5.4 Advanced Degree

The Idaho Division of Vocational Rehabilitation may assist with an advanced degree, based on the rehabilitation needs of the individual. In order to support an additional degree, it must be demonstrated that the individual is unable to achieve an employment outcome that is consistent with the individual's strengths, abilities, capabilities and economic needs based upon existing academic credentials.

Progress Measures

Individuals must maintain a grade point average that meets the school's academic requirements (minimum 2.5 GPA or “C” Average) and must demonstrate timely progress towards meeting the goal of the IPE. If the individual is placed on academic probation, s/he has one grading period in which to attain good standing. IDVR sponsorship will terminate after that grading period unless the individual achieves good standing.

If a participant does not pass a course(s) or withdraws following the designated drop period for the post secondary institution, s/he is responsible to cover costs to repeat the course(s). *This understanding should be documented on the IPE that supports the training services.*

If a participant takes an incomplete, s/he is responsible to complete the course(s) as



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designated by the institution and may be responsible to pay for the repeat of the course(s) *based upon whether or not active participation in the original coursework was demonstrated as agreed upon in the IPE. Disability-related interruptions will serve as justification for an incomplete, but should be carefully assessed to determine the feasibility of extending a particular program.* If a participant is unable to complete a course(s) due to a disability related issue, IDVR may assist in coordinating with the institution to resolve the matter (examples: finances, withdrawals, incompletes, etc.).

Expulsion from a post secondary program for academic dishonesty will result in IDVR sponsorship being terminated for continued post secondary education.

Loan Defaults

VR funds may not be utilized to pay for post secondary education if an individual has defaulted on a state or federal student loan. If a good faith effort is being made, as determined by the National Clearinghouse, VR funding may be available. The University or College Financial Aid office may be able to assist in unusual circumstances. Additional information can be obtained toll free from the Financial Aid Ombudsman office at 1-877-557-2572.

Loan Deferment

Consumers may be eligible for temporary suspension of loan payments during specific conditions such as returning to school, unemployment, disability or military service. Additional information may be sought through the Financial Aid Offices at the in-state universities.

12.5.5 Benefits Counseling - Services may include a profile of individual's benefit and employment status, analysis/consultation of the potential impact of employment alternative and use of work incentives on benefit status and consideration of available work incentives. All social security recipients should receive benefits counseling services.

12.5.6 On-the-job training (OJT) - On-the-job training requires the completion and signing of the IDVR OJT Agreement between the individual, counselor, and employer, which states the hourly wage, responsibility for Workers' Compensation coverage and any other conditions of employment. IDVR pays a training fee for OJT, not reimbursement of wages.

OJT AGREEMENT

Vocational Rehabilitation and _____ agree to the following contract
(employer)
for training of _____. Training will be directed toward employment goal of
(client)
_____.

1. VR will reimburse employer for training costs in the amount of \$_____ per month for _____ months or on a decreasing scale as follows: _____. OJT will begin _____.
2. If training ceases before training contract ends, payments will be made only for the actual time training is provided.
3. Progress reports will be completed monthly by the trainer/employer.
4. Satisfactory progress by the client will result in consideration for employment at completion of training.
5. Neither VR nor trainer/employer will discriminate on basis of sex, race, color, creed, home of national origin, age, disabling condition or veteran status.
6. This agreement may be terminated by notification at any time by either the trainer/employer or Vocational Rehabilitation.

Vocational Rehabilitation Counselor

Trainer/Employer

Date

Date

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ON-THE-JOB TRAINING REVIEW

EMPLOYEE: _____ JOB TITLE: _____

DATE: _____

EMPLOYER: _____ WAGE: _____

Review Period: _____ to _____ (Check one box on each line)

Ability to do assigned work ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Knowledge of work ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Accuracy ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Speed ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Attitude toward work ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Ability to learn ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Initiative ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Reliability ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Conduct ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Relation with other workers ☐ Exceptional ☐ Good ☐ Satisfactory ☐ Lacking ☐ Poor

Comments:

Signature and Title of person completing evaluation

Signature of Employee/Trainee

12.6 Job Placement of Participants

VR counselors should regularly visit employers to keep current with common business practices, employer expectations, essential functions, local trends, and opportunities for employment. Developing effective ongoing relationships with employers is essential to good planning and positive employment outcomes. VR Counselors can create a demand for individuals with disabilities by marketing specific business gains or advantages that can result from IDVR services.

Individuals who are able to conduct their own job search and placement activities should determine the level of involvement they desire from the VR Counselor. VR Counselors may be able to assist participants by teaching them skills in communication and presentation; as well as skills associated with gaining access to and using information. Introducing consumers to specific individuals/programs at job centers may be appropriate.

Some individuals may choose to seek employment through private employment/staffing agencies. Nationally, employers are increasingly obtaining both their temporary and permanent employees in this manner. In addition to placement services, these agencies may provide an assessment of the consumer's skill level or readiness for work. Employers generally pay the staffing agency fees. *Neither participants nor IDVR should pay fees to private employment agencies.*

12.6.1 Community Rehabilitation Providers (CRPs) may be used to identify or carve out positions for those individuals who cannot successfully compete in the open job market. When subcontracting this service, VR counselors must ensure that quality employment outcomes, as defined on the participant's IPE are being provided. The employment outcome should be consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and be the informed choice of the individual. To the maximum extent appropriate, the job placement should be in an integrated setting. Potential employers contacted by the CRP should be informed of their contractual relationship with IDVR. Ideally, the VR Counselor should meet with the potential employer, preferably on the job site, to negotiate the actual placement and to describe the role of the CRP as related to the particular participant.

If services are contracted out to a CRP:

1. The participant and VR counselor will review the available list of CRP vendors and the services offered by each and will make a selection. This process should be noted as "consumer choice" when documenting the choice of the CRP vendor and services to be provided. The participant will sign an information release form authorizing communication between the selected vendor and IDVR.
2. The participant and VR counselor will contact the CRP to discuss required services, negotiate and agree upon time frames and costs.
3. The VR counselor will submit referral information (a fully completed referral form

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outlining all pertinent medical/psychological data, any felony history, and functional restrictions) and authorization to the CRP.

4. The VR counselor will always maintain contact with the participant during referral to a CRP and while receiving services.
5. The individual, VR counselor and CRP will mutually agree upon frequency of contacts to monitor progress, quality and duration of services provided.
6. The VR counselor will maintain contact with the participant and employer at the job site either through personal contact or delegated contact by the vocational counselor assistant (VRA) unless the individual specifically requests that contact be maintained off the work site..

12.6.2 Worker's Compensation Liability

Employers should be educated with regard to the fact that a person eligible for vocational rehabilitation services under ID. Title 33, Chapter 23, Idaho Code and the Administrative Rules of IDVR, who is placed with an employer through the authorized services of a CRP for community-based evaluation, community-based work adjustment or community supported employment (CSE) training is covered for liability purposes through the Worker's Compensation Insurance carried by the CRP unless an actual participant has actually been hired by a targeted employer prior to the provision of authorized services.

12.7 Schedule A Appointing Authority in the Federal Government

5 CFR 213.3102 (t) (mental retardation), (u) (severe physical disabilities), and (gg) (psychiatric disabilities) are combined into one streamlined authority, 5 CFR 213.3102 (u). This authority is used to appoint persons who are certified that they are at a severe disadvantage in obtaining employment because of disrupted employment due to hospitalization or outpatient treatment for the severe disabilities listed above.

Appointment and Certification Process

This certification to the Federal Government is a significant determination. Prior to issuing the certification the counselor shall visit the proposed worksite. The purpose of the visit is to assess the participant's need for assistive technology, and other vocational rehabilitation services that will enhance the participant's success in federal employment. Close follow-up with both the participant and employer is absolutely essential during the initial months of job placement. Careful and thoughtful job match of participants to federal employment will increase the likelihood that the participant will maintain employment.

The Division of Vocational Rehabilitation will not contract for job placement services with a community service provider to complete any of the above activities related to certification of placement through a Schedule A appointment.



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The certification CAN be accomplished in two steps. The first step is a letter from the state VR counselor certifying that the individual experiences a significant disability and is eligible for appointment under this appointment authority. This type of certification is sufficient for an applicant to be considered for any job.

The second certification is completed when a participant has been tentatively selected for the position. The second letter must state that the VR counselor has evaluated the job tasks and determined the applicant is able to perform the essential duties of the position. The letter also must state what reasonable accommodation, if any are sought.

The designated Federal Human Resource Manager and/or alternative hiring authority for all positions participants apply for will request the certification of the participants eligibly for special appointment.

The VR counselor is one of an expanded list of accepted entities who can certify job readiness for a federal job assignment. The certification is written in letter format and must verify that the applicant has a severe disability and is, therefore, eligible for this non-competitive appointment authority.

The following web link will provide further clarification regarding the Schedule A hiring authority as well as provide direct links to the Federal Register and the Office of Personnel Management (OPM):

http://www.opm.gov/disability/appointment_disabilities.asp

12.8 Alternative Hire Process for Employment with State Government

Within the IDAPA rules (15.04.01) of the Division of Human Resources and Idaho Personnel Commission exists the provisions and protocol entitled: 097 "Alternative Examination Process for Persons with Disabilities". Under this rule:

1. The VR counselor determines the need for the Alternative Hire process by documenting that the participant cannot competitively compete for the job due to a disability(ies).
2. The VR counselor determines that the individual meets the criteria for the alternative hire program.
 - Disability limits one or more functional areas
 - The individual meets the qualifications of the class.
 - The individual lacks competitiveness in the normal hiring process due to disability.
3. Complete the Application for the Alternative Hire Program Form. Include a letter to DHR explaining why the participant cannot compete through the normal examination

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process due to his/her disability. The examination process includes application, testing and interviewing.

4. Staff the case with the Regional Manager for approval. Subsequently forward the application to the VR Administrator for final approval.
5. IDVR Administrator approves/disapproves. If approved, the application will be forwarded to the Administrator of the Division of Human Resources for final review.
6. VR counselor proceeds with the alternative hiring process to the hiring authority.
7. After the individual is hired, the VR counselor will monitor progress on the job. If the placement is unsuccessful, the VR counselor will withdraw the individual from the job and develop another employment strategy if appropriate.

NOTE: The VR counselor will utilize the “Alternative Hire Application” and will follow the Alternative Hire Administrative Process (located under VR Intranet/Field Services/Other Forms).

12.9 Self-Employment Policy

Introduction:

The primary goal of the Idaho Division of Vocational Rehabilitation (IDVR) is to assist the participant in attaining a suitable competitive employment outcome that results in financial self-sufficiency. Self-Employment is one of the occupational options that may be considered to assist the participant in selecting a vocational goal.

The impediment created by the participant’s disability must be addressed in the overall comprehensive assessment leading up to Individualized Plan of Employment (IPE).

The successful self-employment enterprise is operated by a participant who can demonstrate an array of skills and abilities, including organization, business and financial management, marketing and other talents, as well as, knowledge and expertise in the goods or services being produced. It is essential that the participant is well informed of potential risks and that efforts are made to minimize those risks, to the greatest extent possible.

A vocational evaluation/career exploration may be used as a method of assisting the participant and VR counselor in deciding if self-employment is a possible viable option. Vocational evaluators have a variety of instruments, work samples, inventories and other strategies to use in providing feedback and information related to self-employment.

There may be a need for VR services prior to a commitment from IDVR on a self-employment plan. It could be appropriate for IDVR to assist an individual in services,

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such as training needed for certain skills or business knowledge before the decision is made by the individual and counselor to pursue the development of a business plan.

IDVR values self-employment as a viable vocational outcome. Self-employment is presented by the VR counselor within the repertoire of vocational options and may be considered by participants and VR counselors as they work toward the development of an appropriate vocational goal.

Through initial exploration of personal and business feasibility assessment, participants and their VR counselors will be equipped to make an informed decision about self-employment as vocational goal. Through training, technical assistance, financial assistance, and post start-up monitoring, participants will have support necessary to become self-employed.

Definitions

For the purposes of this policy, the following definitions apply:

1. *Self-employment* - refers to an employment outcome in which an individual works in a business that s/he owns, operates, and manages with the intention of being profitable and becoming self-sufficient
2. *Supplemental Self-employment* – refers to an employment outcome in which an individual works in a business that s/he owns, operates, and manages with the intention of being profitable but only as a supplement to other sources of income including Social Security benefits
3. *Form of Organization* – refers to the way the individual legally organizes the business
 - a. *Sole Proprietorship* - one person who owns the business alone, but may have employees. S/he will have unlimited liability for all debts of the business, and the income or loss from the business will be reported on his or her personal income tax return along with all other income and expense s/he normally reports (although it will be on a separate schedule)
 - b. *Corporation* – requires a legal filing with the Internal Revenue Service for corporate status. Corporate organization provides limited liability for the investors. Shareholders in a corporation are obligated for the debts of the corporation; creditors can look only to the corporation's assets for payment. The corporation files its own tax return and pays taxes on its income.
 - Individuals who legally organize their businesses as a corporation, and are employed by their corporation may be eligible while in the start up phase of operations.
 - c. *General and Limited Partnerships* – two or more individuals, one of which is a participant of IDVR with the controlling share (see Eligibility).
 - d. *Limited Liability Company* - limited liability for all of its members (business partners), with the IDVR participant as the controlling member.

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4. *Hobby* – individuals identifying business-related goals that indicate a business activity that is:
 - e. Operated for recreation and/or pleasure.
 - f. Not projected to be profitable.
 - g. Not seeking profitability.
 - h. Neither operating nor carrying on activity in a business-like manner.
 - i. Not depending on activity for livelihood.

Eligibility Requirements

Participation in self-employment or supplemental self-employment as a vocational goal requires that:

1. The business venture is, at a minimum, 51% owned, controlled and managed by the IDVR participant.
 - Businesses organized as Sole Proprietorships, Corporations, General and Limited Partnerships, and Limited Liability Companies, as noted in Definitions-Forms of Organization.
2. The business venture is considered legal in Idaho as defined by the Idaho Attorney General.
3. The business venture is accurately reported to appropriate government agencies. including the Internal Revenue Service and Idaho State Tax Commission or other states bordering Idaho.
4. The business venture is organized as a for-profit entity.

Role of IDVR:

When working with individuals expressing an interest in self-employment or supplemental self-employment, the primary role of IDVR is to:

- Provide relevant information regarding the availability of self-employment services supported by the agency.
- Assess the individual's disability as it relates to the self-employment goal.
- Reduce or eliminate barriers to self-employment created by the disability.
- Authorize for the provision of external technical assistance including, but not limited to, business feasibility, training, business planning, and post start-up monitoring.
- Assist in identifying resources for the capitalization of the business plan.

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- Coordinate training and technical assistance services.
- Provide technical assistance as deemed appropriate at post start up of the business.
- Monitor business development at post start up.

Role of the Participant:

Exercising informed choice in the rehabilitation process has attendant responsibilities for the participant. These responsibilities include, but are not limited to:

- Determining the concept of the business.
- Participating in the assessment process.
- Exploring the feasibility of the business venture by conducting research and gathering information, in collaboration with the technical assistance provider, related to the business concept, market feasibility, and financial feasibility.
- Researching the availability of financial resources.
- Contributing financially to the capitalization of the business venture by utilizing all available financial resources available including microloans, commercial and consumer loans, loans from family, forgivable loans, equity grants, and personal property (inventory and equipment) essential to the operation of the business.
- Assisting in the identification of existing and potential barriers created by the disability.
- Developing skills and abilities necessary to operate and sustain the business venture.
- Business implementation and management.
- Providing regular financial documentation to the agency for post start up monitoring.
- Fulfilling participation in the business start up as noted in the Individualized Plan of Employment (IPE).

Self-Employment Process

The case record will reflect the following self-employment process:

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1. Assessment of participant's Readiness for Considering Self-Employment and Supplemental Self-Employment, includes:
 - a. Evaluation of the individual's interests, skills, aptitudes and personal qualities as they relate to self-employment. This may include a) use of data gathering instruments, and b) formal vocational assessment to the degree necessary to ensure the individual has the basic skills necessary to operate and manage a small business.
 - b. The individual has attended the training session entitled "Exploring Entrepreneurship" to affirm advantages and disadvantages of business ownership, explore preparedness from a personal perspective, assess skills related to the business venture, and explain IDVR guidelines for receiving technical and financial assistance for business development.
 - c. Examination of the individual's financial goals related to self-employment or supplemental self-employment should include consideration of issues such as terminating government benefits, supplementing family income versus primary source of support, and earning sufficient funds to maintain competitive employment standards.
 - d. The individual's expectations relative to the financial support s/he anticipates/expects from IDVR should be discussed at the onset. It is important that the participant understands that *IDVR will not be the sole source of start up capitalization and that any funding allocated to the start up of the business will be consistent with IDVR policy related to financial participation.*
2. Assess the participant's disability as it relates to the self-employment goal:
 - a. Ensure the viability of self-employment as it relates to the individuals disability. This may require consultation with medical and/or psychological service providers that have been treating the individual. If clear information is not available reflecting the participant's ability to handle the physical, mental/emotional, and cognitive aspects of the business venture, additional assessments, such as a functional capacity evaluation, an assessment of cognitive skills and abilities, mental status evaluations, and work site analysis, should be pursued as appropriate.
3. Assess the Feasibility of the Business:
 - a. Participants will be referred to outside resources for assistance in examining the concept, market and financial feasibility of the business. Examples of resources may include: The Abilities Fund, the Idaho Small Business Development Centers, Bonner Business Center in Sandpoint, META and Sage Community Resources Program in Boise, and other local/regional microenterprise organizations and community economic development programs. If the business idea is deemed feasible, the information developed at this stage will provide some of the basic data that will be used in completing the Business Plan to be written later.

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Testing the feasibility of the business idea should be formalized through a written Feasibility Assessment documenting the following:

- **Concept Feasibility:** Clear description of the business idea; individual's background related to the business concept including education, training, direct experience and transferable skill sets; a summary statement identifying issues of concern regarding the feasibility of the concept; and a recommendation as to whether the business concept is feasible.
- **Market Feasibility:** Geographic description of market area; description of competitors working in or marketing to potential customers in geographic area; definition of target markets including size and scope of each market; zoning issues/requirements for establishing a business at intended location.
- **Financial Feasibility:** Capitalization requirements (start up funding not to exceed 6 months) consistent with the individual's business concept; identification of resources for start up funding and ongoing capitalization. Twelve months of projected sales/expenses may be included, when appropriate.

4. Participant Training and Technical Assistance:

- a. All individuals will be expected to attend training, when available, and participate in technical assistance services related to self-employment and supplemental self-employment. This could include options such as training and technical assistance from: The Abilities Fund, the Idaho Small Business Development Centers, local/regional microenterprise development service providers such as Bonner Business Center in Sandpoint, META, and Sage Community Resources Program in Boise, and other local/regional microenterprise organizations and community economic development programs, consisting of subjects such as exploring entrepreneurship, small business development, business plan development, small business management, accounting for business, and business financing. *Exceptions to the above requirement may be made with supervisory approval in limited circumstances such as:*
 - At the time the individual establishes self-employment or supplemental self-employment as a vocational goal, the individual has completed a positive feasibility assessment, a business plan including the Participant Business Plan Checklist. In this case, the counselor will complete the Counselor Business Plan Checklist and then proceed with actions required for consideration of financial assistance.
- b. Individuals may require business specific skill training to eliminate skill gaps or prepare for the operation of the business. This could include coursework such as accounting/bookkeeping, using computers in business, human resources in business, etc. Skill-building courses should be noted in the IPE as necessary.

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5. Business Plan Development:

The Business Plan is viewed as an essential element in any business venture and will be the document used by IDVR, banks, micro lenders and other funding organizations to determine whether or not to participate in capitalizing the business venture.

- a. A comprehensive Business Plan will be required for all participants, regardless of their goal of self-employment or supplemental self-employment, as they request financial assistance for a business venture. The content for a comprehensive Business Plan is defined in the Participant Business Plan Checklist (see Attachment 1). Participants should use the Participant Business Plan Check List as a guide for preparing the business plan to ensure that all the critical areas are addressed.
- b. The individual will prepare the Business Plan with external technical assistance from a service provider experienced in business plan development.
- c. Benefits counseling will be provided with a focus on the projected impact of revenues and expenses as noted in the Business Plan.

6. Explore and Apply for Resources Available From Other Sources:

IDVR participants pursuing self-employment and supplemental self-employment *are required to explore, and when appropriate, apply for funding from sources other than IDVR*. These may include microloans, commercial and consumer loans, loans from family, forgivable loans, equity grants, and work incentives for Social Security recipients including Plans to Achieve Self Support (PASS) and personal property (inventory and equipment) essential to the operation of the business (PESS).

7. Review of Business Plans for Funding Consideration:

The individual's goal toward self sufficiency and the level of the agency's financial participation in the start up capitalization of the business will determine the level of review and approval required.

- a. The counselor will review the plan for completeness according to the Counselor's Business Plan Checklist (Attachment 2);
- b. When the individual's vocational goal is supplemental self-employment (not seeking self sufficiency), the counselor may approve the Business Plan for financial assistance up to \$2,500. Financial participation by the individual is not required. A cap of \$3,500 in IDVR support will be established for supplemental self-employment strategies. The individual must contribute all costs beyond the \$3,500. It is not necessary to assemble a self-employment team for this strategy.

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- c. When the individual's vocational goal is self-employment (seeking self sufficiency), and his/her request does not exceed \$2,500, the counselor may approve the Business Plan for financial assistance.
- When the request for financial assistance exceeds \$2,501, Business Plan review and approval by a Self-Employment Team will be required. The Self-Employment team will include the counselor, area supervisor, and at least one outside consultant/business development organization with experience in business development and/or business finance. The Counselor's Business Plan Checklist (Attachment 2) will determine the completeness of the Business Plan.
- d. In cases where feasibility of the plan is in question as it relates to the funding request, IDVR may have the Business Plan reviewed by an outside resource with expertise in small business, micro enterprise development and/or business finance.

Note: The recommendation of the outside resource will contribute to, but not define, the agency's final determination as to business feasibility. When an outside resource is used to contribute to the final determination, final funding approval will rest with the Supervisor and will be dependent on a variety of factors including, but not limited to:

- Total start up costs.
 - Feasibility of the Business Plan in all aspects.
 - Potential for other financial resources, and
 - Availability of agency funds.
- e. Process for Review by Self-Employment Team
- The counselor will review the Business Plan, complete the Counselor's Business Plan Checklist, and notate the IDVR participant's file as appropriate.
 - When warranted, the counselor will coordinate the Self-Employment Team, including determining who will participate as the outside consultant/business development organization. A Participant Release of Information will be obtained from the individual and will be submitted as part of the Business Plan review package.
 - The counselor will distribute the Business Plan review package to the Self-Employment Team and schedule the review.
 - The Self Employment Team will convene and conduct its review within fifteen (15) working days of receiving the Business Plan review package.
 - The Self Employment Team will provide an opportunity for the participant, or a designated representative, to present information about the Business Plan.
 - The panel will review the Business Plan in terms of its feasibility, offer suggestions for improvement if necessary, and make recommendations for approval or disapproval.
 - The review panel will provide a written response with recommendations to the

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individual within ten (10) working days of their review.

Individual Plan for Employment

The IPE or IPE Amendment will be developed after the comprehensive assessment is completed and before development of a Business Plan is initiated.

- a. As part of the comprehensive assessment, training and technical assistance, activities will occur such as training workshops and/or seminars focused on self-employment issues, feasibility assessment development, and other exploratory or preparatory activities that contribute to determining business feasibility prior to Business Plan (**Note:** If an IPE is in place at the time self-employment is determined as the vocational goal, an IPE Amendment may be developed).
- b. An IPE/IPE Amendment should be initiated at the point in time that the business feasibility has been established and before technical assistance for Business Plan development is authorized. The IPE/IPE Amendment would include the specific services to be provided for Business Planning.
- c. Upon review of the Business Plan for financial assistance, the IPE should be amended to reflect the approved financial assistance and technical assistance plan for monitoring the business post start up. Benchmarks for case closure will be included in the IPE at this point.

Financial Participation Requirements

For those individuals pursuing self-sufficiency through self-employment, they will be required to participate in the start up capitalization of the business through documented investment of funds from microloans; commercial and consumer loans; loans from family; forgivable loans; equity grants; and equipment critical to the business operation, inventory, and preparation of the business location valued at market rate (sweat equity) including, but not limited to, painting, cleaning, and general business site preparation activities.

- a. In consideration of the business start up capitalization noted in the Business Plan, financial participation by IDVR and participant is as follows:

<u>Business Capitalization</u>	<u>IDVR Financial Assistance</u>	<u>Client Participation</u>
Under \$2,500	100%	0%
\$2,501 to \$5,000	80% of start up capital	20%
\$5,001 to \$7,500	70% of start up capital	30%
\$7,501 to \$10,000	60% of start up capital	40%
\$10,001	50% of start up capital	50%



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- b. Financial participation will not be required for IDVR investment in:
- Training and technical assistance
 - Accommodations necessitated by the individual's disability in order to participate in training, technical assistance or in consideration of financial assistance

Limitations and Restrictions

Financial assistance for business start up capitalization does not include:

1. Funding for speculative real estate development.
2. Utility deposits that are refundable to the individual or business.
3. Cash.
4. Salary or benefits for the individual, partners in ownership, or employees of the business that are members of the participant's immediate family.
5. Purchase of real estate.
6. Erection of buildings.
7. Inventory or business supplies that include tobacco, firearms or alcoholic beverages.
8. Refinancing of existing debt – business or personal.
9. Business continuation expenses subsequent to the initial startup costs.

Exceptions

If the counselor determines that there are circumstances in an individual case that warrants consideration for an exception to financial participation policy, a full explanation with justification should be presented to the Supervisor for review and decision.

Case Closure and Follow-up

1. Benchmarks leading to consideration for case closure in self-employment include:
 - a. The business shows signs of stability as reflected in the business' financial records including profitability at a level consistent with the participant's definition

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of "Profitability Goal" as noted in the Participant Self Employment Checklist.

- b. The business has been operating for a period of time long enough to adequately assess the stability of the business. A minimum of six months and a maximum of one year are recommended.
 - c. All services agreed to in the IPE have been provided.
 - d. The Individual agrees with the counselor's recommendation to close the case.
2. Benchmarks leading to consideration for case closure in supplemental self-employment include:
- a. The business shows signs of stability as reflected in the business' financial records and is contributing to the individual's income as indicated by goal noted in the IPE.
 - b. The business has been operating for a period of time long enough to adequately assess the stability of the business. A minimum of six months and a maximum of one year are recommended.
 - c. All services agreed to in the IPE have been provided.
 - d. The individual agrees with the counselor's recommendation to close the case.
3. Property Agreements

Self-Employment Plans that include property purchased by the agency must designate that such property will be released to the client only after they have completed one successful year of business.

Client Checklist for Self Employment

The Client Checklist should accompany a completed business plan and be submitted to the IDVR Counselor for consideration of financial assistance

_____ **Description/dates of training and technical assistance for feasibility & business planning**

_____ **Copy of Feasibility Assessment**

_____ **Completed Business Plan that includes:**

Executive Summary: One to two page review of the business summarizing the most important points of the plan

- Business description
- Business objectives
- Form of organization
- *Product description*
- Summary of business owner's qualifications

Industry/Business Analysis: Analysis of the current status of the industry in which the business operates

- Definition (description of the economic sector that the industry occupies)
- Industry size and growth rate
- Key growth factors
- Analysis of industry in the geographic area where you will operate

Competition Analysis: Review of three to five direct competitors with a comparative analysis to your business

- Image
- Location
- Products & Services
- Pricing
- Advertising methods

Marketing Plan: Detail how business will identify, attract, and retain customers

- Customer profile: Comprehensive description of primary and secondary customer groups including the number of customers in market area
- Description of product attributes and why customers will want to purchase it
- Plan for distributing product (if applicable)
- Promotional schemes for initial 12 months of business
 - ✓ Low cost and no cost advertising
 - ✓ Buying advertising: Media type, frequency, intensity

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Management: Description of the management of the organization including position responsibilities, salary/wages

- Management organization chart
- Personnel

Financial Plan: Total business capitalization request with supporting documentation

- Source and use of all funds for business development
 - ✓ Total dollars needed to adequately capitalize business
 - ✓ Identify all resources (banks, microlenders, IDVR, etc) and confirm participation including personal financial participation
 - ✓ Details of how all capital will be used (what it will buy)
 - Specify use of “operating capital”
- Cash flow projection for 24 months
- Income/Expense projection for 2 years
- Projected business balance sheet for 2 years
- Break-even analysis
- Personal financial statement for business owner
- Personal financial statement(s) for all business principals

Supporting Documents: Documents that will strengthen the business plan. For example:

- Survey results
- Letters of commitment from funding sources
- Contracts
- Leases
- Letters of intent
- Sales agreements
- Resumes
- Personnel policies
- Job descriptions
- Credit report

Client Signature

Date

Counselor Checklist for Self Employment

_____ Case Summary Feasibility Statement by the Rehabilitation Counselor: Detail the participant's ability to pursue the proposed plan based on academic and personality assessments (if applicable) and client readiness for considering self employment and should include: evaluation of client's interest, skills, aptitude and personal qualities related to self employment; notation of participation in Exploring Entrepreneurship training or equivalent; examination of client's financial goals related to self employment; review of client's expectations to anticipated financial support from IDVR; assessment of client's disability as it relates to self employment goal.

\$_____ Business Start Up/Expansion Capitalization (total as presented in business plan)

\$_____ Financial Request to IDVR

Self Employment Team Review Needed: _____Yes _____No

_____ **Copy of Feasibility Assessment**

_____ **Completed Business Plan that includes:**

Executive Summary: One to two page review of the business summarizing the most important points of the plan

- Business description
- Business objectives
- Form of organization
- Product description
- Summary of business owner's qualifications

Industry/Business Analysis: Analysis of the current status of the industry in which the business operates

- Definition (description of the economic sector that the industry occupies)
- Industry size and growth rate
- Key growth factors
- Analysis of industry in the geographic area where you will operate

Competition Analysis: Review of three to five direct competitors with a comparative analysis to your business

- Image
- Location
- Products & Services
- Pricing
- Advertising methods

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Marketing Plan: Detail how business will identify, attract, and retain customers

- Customer profile: Comprehensive description of primary and secondary customer groups including the number of customers in market area
- Description of product attributes and why customers will want to purchase it
- Plan for distributing product (if applicable)
- Promotional schemes for initial 12 months of business
 - ✓ Low cost and no cost advertising
 - ✓ Buying advertising: Media type, frequency, intensity

Management: Description of the management of the organization including position responsibilities, salary/wages

- Management organization chart
- Personnel

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 - ✓ Details of how all capital will be used (what it will buy)
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For example:

- Survey results
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- Leases
- Letters of intent
- Sales agreements
- Resumes
- Personnel policies
- Job descriptions
- Credit report

Counselor Signature

Date



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12.10 Interpreter Services and Note Taking Services

IDVR can provide interpreter services and note taking services for individuals who are deaf, including tactile interpreting for individuals who are deaf-blind; reader services, rehabilitation teaching services, note-taking services and orientation and mobility services for individuals who are blind; telecommunications, sensory and other technological aids and devices.

Note: *If the participant is enrolled in an academic/technical training program at an institution that receives federal financial support, the institution will be responsible for the provision of interpreter services within the classroom or formal training environment i.e., outside the classroom, but mandated or supported by the class curriculum. (A regional exception has been made at the Eastern Idaho Vocational Technical School based upon office space that is being provided to IDVR staff at that institution).*

12.11 Occupational Licenses, Tools, Equipment Initial Stocks and Supplies necessary in order to enter an Occupation

Based upon the participant's financial status, occupational licenses, tools and equipment, initial stocks and supplies may be purchased in order to adequately prepare the individual for a vocational outcome. *Private pilot's license will not be secured through the financial support of IDVR.*

IDVR will not purchase land or buildings for individuals with disabilities. IDVR retains the right to reclaim occupational tools and equipment purchased by the IDVR when the individual's IPE is not completed and/or the case is closed other than rehabilitated.

12.12 Supported Employment Services

Supported employment services may be provided to individuals with the most severe disabilities who require job site training and a variety of on going support services.

12.12.1 Supported employment is defined as follows:

- A. Competitive work (defined as payment of an hourly rate not less than minimum wage) in an integrated work setting (defined as an environment in which the individual engages in as much contact with co-workers or the non-disabled general public as any other non-disabled person working in that job would experience) with ongoing support services for individuals with the most severe disabilities for whom competitive employment:

- 1. Has not traditionally occurred; or

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2. Has been interrupted or intermittent as a result of severe disability; and
3. Who, because of the nature and severity of their disability(ies), need intensive supported employment services or extended services in order to be gainfully employed; or

B. Transitional employment for individuals with chronic mental illness.

12.12.2 Supported Employment Services:

- A. The specific supported employment services to be provided must be included as an objective of the IPE. A Gemini 20 (Referral for Extended Employment Services) must be sent to the appropriate IDVR Extended Employment Services Specialist (EESS), located either in Boise (208-287-6458) or Moscow, Idaho (208-883-8410).
- B. At a minimum, contact must be maintained between the service provider and participant twice per month, during the delivery of supported employment services. This contact may be at or away from the participant's place of work.
- C. Extended services may include the use of natural supports (family, friends, significant others, supervisors, co-workers) as needed.
- D. The source of extended services, or statement that a reasonable expectation exists that extended services will be available following the completion of IDVR supported services, is to be included on the IPE. If the source of funding is the Extended Employment Services' (EES) budget, the vocational counselor should procure a "Client Update Form" from the EESS stating that EES services have been authorized. The "Client Update Form" is generated by the CRP, sent to the EESS who will determine whether to authorize the service. A decision will be made and a hard copy submitted to the CRP and VR counselor for inclusion in the file.
- E. Supported employment is provided by IDVR for a period of time not to exceed 18 months, unless under special circumstances the participant and VR counselor agree to extend the time in order to achieve the rehabilitation objectives included on the IPE.
- F. Supported Employment services are intended to be short-term in duration with transition to an extended service (traditionally called "Long Term Support") that assists the participant to maintain employment.

12.12.3 Examples of Long Term Support Services in Idaho

Long term support services must be provided through an ongoing support plan using another agency, service provider or natural supports and developed in conjunction with or prior to closure.



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Employment for the purpose of Supported Employment must include:

- A. Integrated work to mean job sites where there is daily contact in the immediate work setting with other employees and/or the general public who are not disabled (or as much contact as any other employee in that same position would have with other employees and/or the general public who are not disabled - e.g., a night janitor, with or without disabilities, might not have much contact with anyone).

Supported Employment requires that no more than eight individuals with disabilities be clustered in an employment setting (enclave).

- B. Transitional employment services for persons with chronic mental illness means a series of temporary job placements in competitive work in an integrated work setting with on-going support services for individuals with chronic mental illness.
- C. Work that results in competitive earnings (no less than the prevailing state minimum wage).

Potential sources of extended services may include, but are not limited to the following:

Natural Supports:

Support from supervisors and co-workers occurring in the workplace to assist employees with disabilities to perform their jobs, including supports already provided by an employer for all employees. These natural supports may be both formal and/or informal, and include mentoring, supervision (ongoing feedback on job performance), training (learning a new job skill with a co-worker), and co-workers socializing with employees with disabilities at breaks or after work. Support provided by family, friends or significant others is also included within this definition.

Extended Employment Services: (IDAPA 47.01.02) Funds Managed by IDVR/EES. There are four eligibility categories:

- A. Developmental Disabilities: Eligibility determined by a Medicaid contracted Independent Assessment Provider (IAP) or EESS using the definition provided in section 66-402, Idaho Code.

Initial job placement and stabilization, and training are provided through IDVR Supported Employment (CSE) funds. The CRP provides the actual extended (long-term support) services funded by EES.

NOTE: EES funds cover sheltered employment in addition to long-term maintenance for Community Supported Employment.

- B. Mental Health: (Typically Schizophrenia, Major Mood Disorders, Borderline



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Personality Disorder, Delusional Disorder, Schizoaffective Disorder).

Initial job placement and stabilization, and training are provided through IDVR Community Supported Employment funds and the CRP provides extended services.

- C. Specific Learning Disability – determined by EESS based on DSM:IVR and school records.

Initial job placement and stabilization, and training are provided through IDVR Community Supported Employment funds and the CRP provides extended services funded by EES.

- D. Traumatic Brain Injury – determined by EESS using medical records provided by the vocational counselor. (Typically a traumatic incident rather than the result of a disease process).

Initial job placement and stabilization, and training are provided through IDVR Community Supported Employment funds and the CRP provides extended services funded by EES.

Medicaid:

- A. Developmental Disabilities – Adult DD or Idaho State School and Hospital (ISSH) Home and Community Based Services Medicaid Waiver (IDAPA 16.03.10.703.03). Eligibility for these waivers is determined by the Independent Assessment Providers (IAP) at the Idaho Center on Disability Evaluation.
- B. Mental Health – The category of services Medicaid may be billed for are:
- a. Pre-vocational skills.
 - b. Vocational skills training.
 - c. Case management services.

NOTE: EES lacks the information to confirm or deny these types of Medicaid funded services for individuals with mental health eligibility. There is a mental health waiver but it does not cover vocational services. Under the mental health waiver (IDAPA 16.03.10.125.03) “employment” is listed as an excluded service and is defined as “job specific interventions, job training, and job placement services, which includes helping the participant develop a resume, apply for a job, utilize job training or coaching” (07.01.06T).

12.12.4 Diagnostic and post employment services for all participants (including supported employment) are paid for using general program (Title 1) funds.

12.13 Post-Employment Services (PES)

An individual with a disability who had been previously rehabilitated may require additional services in order to maintain, advance in, or regain suitable employment. In order to qualify for this service strategy, the need must be based upon a disability previously documented in the eligibility determination section. Post-employment services require an amendment to the IPE (in Gemini under "Pages" there is a separate section dedicated to "post-employment services"). *In order to qualify for these services, the participant's vocational needs must be minor in scope (\$1,000 or less) and duration (6 months or less). This means the individual only needs relatively short-term services with minimal cost associated.* Individuals requiring multiple services over an extended period of time and/or a comprehensive/complex rehabilitation plan should be encouraged to reapply for the full-spectrum of VR services since their needs exceed the intent of post-employment services. Services can be provided at any time during the period in which a case record is maintained by the agency (5 years). Once the record is destroyed, a new case must be opened. **Note:** The intent of PES is to ensure that the employment outcome remains consistent with the individual's strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice.

12.14 Rehabilitation Technology Services

Rehabilitation technology services (assistive/adaptive technology) may be provided as compensatory strategies to increase, maintain, or improve functional capabilities of individuals with disabilities. Rehabilitation technology services may be provided at any time in the rehabilitation process, including the assessment for determining eligibility and vocational rehabilitation needs, extended evaluation, services provided under an IPE, and post employment services. Rehabilitation technology, including telecommunications, sensory, and other technological aids and devices are exempt from a determination of the availability of comparable services and benefits. *If, however, comparable services or benefits exist under any other program and are available to the individual, IDVR must use those resources to meet in whole or part, the costs of the vocational rehabilitation services.* (For further information, please review the series of comprehensive fact sheets provided by Idaho Assistive Technology Project located on the IDVR intranet web site. There are also direct links to the Idaho Assistive Technology Project web site at that location)

12.14.1 "Assistive technology service" means any service that directly assists an individual with a disability in the selection, acquisition, or use of an assistive technology device, including

- A. The evaluation of the needs of an individual;
- B. Purchasing, leasing, or otherwise providing for the acquisition by an individual with a disability of an assistive technology device;
- C. Selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing, or replacing assistive technology devices;

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- D. Coordinating and using other therapies, interventions, or services with assistive technology devices, such as those associated with existing education and rehabilitation plans and programs;
- E. Training or technical assistance for an individual with a disability.

12.14.2 An assistive technology device means any item, piece of equipment, or product system, whether acquired commercially off-the-shelf, modified, or customized that is used to increase, maintain, or improve the functional capabilities of an individual with a disability.

12.14.3 Vehicle modifications may be provided as an assistive technology device only when the applicant/individual is otherwise precluded from achieving a vocational objective.

1. In the event that a van requires modification. e.g., hand controls, lift installation, or structural revision, the cost of the modification cannot exceed the current N.A.D.A. Blue Book value of the vehicle. The participant must agree to maintain insurance on the vehicle for replacement costs of the modified equipment.
2. Any vehicle modification over \$3000 must include a minimum of two bids from approved vendors.
3. Recipients of a vehicular modification service must be regarded as *potentially job ready and capable of working on a competitive basis*. This will require a careful assessment by the VR counselor to ensure that the participant fully understands that vehicular modifications are tied directly to the capacity and willingness to complete a plan for employment and actively cooperate in acquiring competitive employment.
4. The participant must understand that a personal financial responsibility exists for the maintenance and replacement of the vehicle, as well as its future modification needs and adaptive equipment following case closure. This should always be stipulated within the IPE that outlines the vehicular modification.
5. Adaptive equipment items that are not documented as medically and/or vocationally necessary will be the responsibility of the individual.
6. In the event that a participant, through necessity, disposes a modified vehicle and subsequently requests IDVR assistance in funding modifications for a replacement vehicle, the individual must contribute the residual value of the disposed modifications toward the cost of the replacement modification. The VR counselor must ensure that a list of previously purchased equipment is appraised by a qualified vendor for residual value.
7. If a participant, when purchasing a new vehicle, is offered a cash

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reimbursement by a manufacturer to help cover the cost of modifications, the reimbursement will be used to reduce IDVR's cost for modifications. The rebate will be applied against the cost of the modifications regardless of obligations imposed by a Financial Needs Assessment. Such rebates are occasionally offered to individuals with disabilities and should be explored as a comparable benefit by the VR counselor and participant..

12.14.4 Housing modifications may be provided as a supportive service so the individual can benefit from a core vocational rehabilitation service provided under an IPE.

12.15 Supportive Services

- A. Maintenance is a funding provision designed to offset *identified additional costs incurred as a result of participating in a rehabilitation service* (expenses incurred by the individual while engaged in assessments required for determining eligibility or while receiving services under an IPE).

NOTE: Maintenance means monetary support provided to an individual for expenses, such as food, shelter, and clothing, that are in excess of the normal expenses of the individual and that are necessitated by the individual's participation in an assessment for determining eligibility and vocational rehabilitation needs or the individual's receipt of vocational rehabilitation services under an individualized plan for employment. (Ref: 34 CFR Part 361.5 (35).)

Counselors cannot pay maintenance for those existing living costs that an individual would normally incur regardless of the individual's participation in a plan of vocational rehabilitation services.

Maximum: \$1,500 total per federal fiscal year. No single monthly amount to exceed \$500. No limit on number of months up to the \$1,500 maximum.

These maximums also apply to Rent and Room & Board for post secondary education.

If the participant receives SSI or SSDI, VR cannot provide maintenance for basic living expenses.

- B. Transportation – is a reimbursement for identified travel and related expenses that are necessary to enable individuals to participate in a vocational rehabilitation service.

Participants and their families are expected to participate in the cost of their transportation expenses since in most cases vehicles are not used exclusively for



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rehabilitation activities.

1. Actual costs may be paid for taxi, buses, airplanes, etc.
 2. When using a privately owned vehicle, fuel assistance will be negotiated at IPE development. This depends upon actual transportation expenses for participation in rehabilitation services. Routine vehicle maintenance is not covered by IDVR.
 3. The VR counselor must take into account the following issues when confronted with a request from a participant to repair or modify a privately owned vehicle:
 - a. The overall condition and value of vehicle.
 - b. The extent of the repairs or modifications needed.
 - c. The availability of other appropriate transportation.
 - d. The necessity that the vehicle be used for work or training.
- C. Auto Insurance – A one-time authorization may be issued to purchase three months state required liability insurance. Insurance purposes must be directly related to the individual's attending work.

12.16 School Transition

The Idaho Division of Vocational Rehabilitation (IDVR) participates in student transition planning as outlined at 34 CFR 361.22 of the Rehabilitation Act Regulations. The Regulations require plans, policies, and procedures that provide for the development and approval on an individualized plan for employment as early as possible during the transition planning process but, at the latest, by the time each student who is determined to be eligible for vocational rehabilitation services leaves the school setting. The Act also provides for:

1. Consultation and technical assistance to educational agencies in planning for the transition of students with disabilities from school to post-school activities, including vocational rehabilitation
2. Transition planning by personnel of IDVR and the educational agency for students with disabilities that facilitates the development and completion of their Individualized Education Programs (IEP's) under section 604 (d) of the Individuals with Disabilities Education Act (IDEA);
3. The roles and responsibilities including financial responsibilities, of each agency; and
4. Procedures for outreach to and identification of students with disabilities who are in need of transition services. Outreach to these students should occur as early as possible during the transition planning process and must include, at a minimum, a description of the purpose of the vocational rehabilitation programs, eligibility requirements; application procedures, and scope of services that may be provided to eligible individuals.

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Both the Amendments of the Rehabilitation Act and the Individuals with Disabilities Education Act (IDEA) define transition services as a coordinated set of activities for a student designed within an oriented process that promotes movement from school to post-school activities including post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, and independent living or community participation. The coordinated set of activities shall be based upon the individual student's needs, taking into account the student's preferences and interests, and shall include instruction, community experiences, the development of employment and other post-school adult living objectives, and when appropriate, acquisition of daily living skills and functional vocational evaluation.

- Both the 1992 Amendments of the Rehabilitation Act and the Individuals with Disabilities Education Act (IDEA) define transition services as a coordinated set of activities for a student designed within an outcome oriented process that promotes movement from school to post-school activities including post secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, and independent living or community participation. The coordinated set of activities shall be based upon the individual student's needs, taking into account the student's preferences and interests, and shall include instruction, community experiences, the development of employment and other post school adult living objectives, and when appropriate, acquisition of daily living skills and functional vocational evaluation.
- Referrals should be made to the VRC no later than two years before the student exits high school. Earlier referrals can be made based on individual student need. All students with disabilities should be referred, not just those students in special education.
- The attendance of the VRC at the development of Individual Educational Plans (IEPs), Individual Transition Plans (ITPs) and Child Study Teams (CSTs) is at the invitation of the school and agreement between the VRC and CST members. VRC will determine the appropriate time to take application when the focus is on the final vocational objective or formal planning for continued employment preparation after the student exits from high school.
- The school's responsibility is to provide a free and appropriate education to all students. This includes instructional aids, devices, and necessary services to achieve educational goals.
- IDVR's responsibility is to facilitate the accomplishment of long-term vocational rehabilitation goals and intermediate rehabilitation objectives identified in the student's IPE. Only services that are required for achievement of the employment goal will be provided or coordinated.

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- There is a statewide interagency agreement among the Idaho Department of Education, the Idaho Division of Vocational Education and the Idaho Division of Vocational Rehabilitation. There are also regional cooperative agreements between IDVR and specific school districts. For additional information, please refer to those cooperative agreements.

12.17 Services to Family Members

The definition of "Family Member" includes any relative by blood, marriage, or adoption of the eligible participant as well as other individuals living in the same household with whom the participant has a close interpersonal relationship.

Conditions and Criteria:

- A. Services may be provided only to individuals that meet the definition of family member.
- B. The services to be provided are those which are deemed to be necessary to the successful completion of the participant's rehabilitation plan (IPE, Extended Evaluation, or Trial Work Period). The participant and VR counselor will make the determination as to whether a service to a family member is necessary to the vocational rehabilitation of the individual participant.
- C. Comparable services and benefits are to be explored and if available, utilized prior to expenditure of agency funds.
- D. IDVR funds can only be utilized if economic need is established on the Financial Needs Form (FNA).
- E. Family members may not have access to the participant's record of service without a release of information. Family members may have access to information pertaining to the services they received.

Procedures:

- A. The IPE must set forth the services to be provided to the family member.
- B. In developing the IPE the VR counselor must ensure that the participant and family member(s) understand the basis for the provision of services in order to avoid any misunderstanding as to the scope, nature and duration of services.
- C. Services to family members must be terminated whenever one of the following conditions prevails:
 - 1. When a service(s) is no longer necessary to the individual's plan; or
 - 2. When the participant's plan is terminated in accordance with case closure

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- procedures; or
3. When Post-Employment Services are terminated.
- D. When services are provided to family members, the record of service must include:
1. A rationale that the services are required to support the participant's success in completing objectives of the IPE;
 2. Data, including medical information, to support the decision to provide services;
 3. That services are provided in an integrated environment;
 4. Identification of family member(s) receiving those services;
 5. The cost of such services;
 6. And documentation of the time limited nature of these services.

12.18 Personal Care Attendant Services

A personal care assistant (PCA) assists an individual with a significant disability by performing personal activities of daily living requiring hands-on help, which cannot be performed by the individual because of the significance of the disability. PCA services include personal care related tasks such as:

1. eating
2. drinking
3. toileting
4. bathing
5. transfers
6. dressing
7. grooming
8. medications

PCA services do not include chore services, respite, cueing, or household tasks. In most cases, tasks performed by the PCA are participant directed. The PCA is not responsible for any tasks that the individual with a disability can perform independently.

PCA services have been developed to enhance the ability of an individual with a significant disability to live and work independently. The need for PCA services is normally identified through an independent living (IL) evaluation and services are, in most cases, provided to an individual with a significant disability, prior to application for IDVR services.

A PCA must have completed a state approved training program or have substantial knowledge and experience in providing PCA services.

It is the policy of the IDVR to provide PCA services to individuals with significant disabilities, when PCA services over and above those required for normal daily living are required to assist the participant to complete the VR process. IDVR does not

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provide PCA services in lieu of existing PCA programs and providers. If the VR counselor determines that PCA services are necessary for the participant to complete the objectives of the IPE, the VR counselor will need to conduct or obtain a personal care assistant evaluation to determine the number of hours of PCA services that are required for participation in the IPE over and above the participant's normal daily living needs.

It is the responsibility of the participant and the VR counselor to identify, apply for and utilize any and all similar benefits for PCA services. PCA recruitment and management is the responsibility of the participant. Payment for PCA services is made through an authorization to the participant for PCA services. The participant then pays the chosen provider. The hourly rate for PCA services funded by IDVR will not exceed the current rate established by Medicaid. The PCA is paid by the task. All other time is standby per regulation. The participant is required to submit verification of services received from the provider to IDVR on a monthly basis to continue to receive PCA funds.

IDVR PCA services are time limited in nature and are provided during the vocational rehabilitation process if required to assist in determining eligibility, for participation in vocational evaluation and assessment, and during implementation of an IPE with a goal leading to competitive employment. The provision of PCA services must be linked directly to the objective of the IPE. PCA services funded by IDVR must be for those tasks over and above PCA services normally required for tasks of daily living. No more than 40 hours per week will be authorized for PCA services.

When the IPE objectives have been successfully completed and the goal of competitive employment has been achieved, provision of PCA services required to maintain employment becomes the responsibility of the participant.

12.19 Reserve Fund

Fiscal will hold \$100,000 for each Federal Fiscal year at Central Office for participant plans, i.e. van conversion, or prosthetic/orthotic devices. When a Regional Manager receives a request for one of the above items in excess of \$10,000, the Regional Manager shall contact the Chief of Field Services and submit a faxed copy of the lowest bid for the requested services.

Best practice mandates a minimum of 3 bids be procured when available within a reasonable proximity.

Upon approval, the requested amount will be allotted to that Regional Office by the Manager of Fiscal Operations. For further information or clarification, please contact the Chief of Field Services.

SECTION 13.0 CLOSURE

The VR counselor shall close an individual's record of services at any time in the vocational rehabilitation process when it is determined that the individual is no longer eligible, is unavailable for diagnostic or planned services, chooses not to participate, or is rehabilitated. The authorized "Reasons" for closure are stipulated in the drop down box in the "Closure" module of Gemini under "Outcome".

13.1 Ineligibility Based Upon Disability Issues

13.1.1 A person will be determined ineligible when it is determined that s/he has no disability, or no substantial impediment to employment or the individual does not require vocational rehabilitation services to achieve an employment outcome.

This decision requires:

- A. That Idaho Division of Vocational Rehabilitation (IDVR) provides an opportunity for the individual or his/her representative to receive full consultation regarding the closure decision.
- B. A written notification of ineligibility closure determination, or other appropriate mode of communication, explaining in clear and concise language the reason(s) for the ineligibility determination.
- C. A written notification of appeal rights, including the name and address of the person with whom an appeal may be filed, and the availability of the Client Advocacy Program (CAP).
- D. Referral to another agency(ies), including One-Stop service delivery systems and community rehabilitation programs when appropriate

13.1.2 It must be documented that there is clear and convincing evidence after a Trial Work Experience or an Extended Evaluation following a period of service provision under an IPE that the individual with a disability is incapable of benefiting (too severe) from IDVR services in terms of achieving an employment outcome.

This decision requires:

- A. An opportunity for the individual or designated representative to receive full consultation at closure.
- B. A written notification of ineligibility closure decision, or other appropriate mode of communication, explaining in clear and concise language the reason(s) for the determination.
- C. A written notification of appeal rights, including the name and address of the



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person with whom an appeal may be filed, and of the availability of the CAP.

- D. An annual review of the ineligibility determination following the closure of the record will be conducted within 12 months and annually thereafter, if requested. The individual with a disability, or, if appropriate, the individual's representative, shall have input into the review and reevaluation, and through signed acknowledgement attest that the review and reevaluation have been conducted.
- E. A review is not required in situations where the individual refuses services; the individual is no longer present in the State; the individual's whereabouts are unknown or the individual's medical condition is rapidly progressive
- F. Referral to another agency(ies), including One-Stop service delivery systems and community rehabilitation programs when appropriate

13.2 Ineligibility Based Upon Other Reasons

13.2.1 The VR counselor may close a case record when an individual is unavailable for an extended period of time. The VR counselor must make a concerted effort to contact the individual, or when appropriate, a designated representative to encourage the participation of the individual in IDVR services.

This decision requires:

- A. A rationale for closure documented in the case record and documentation of efforts to contact individual or designated representative.
- B. A written notification to the individual, if whereabouts are known.

13.2.2 The VR counselor may determine that an individual receiving services under an IPE is no longer eligible for services. The VR counselor must:

- A. Make the determination only after providing an opportunity for full consultation with the individual or a representative.
- B. Inform the individual in writing of the ineligibility determination including the reasons for that determination. The individual will also be given a statement of his/her rights and remedies available at closure. (Gemini 3)
- C. Complete the closure check list (Gemini 19), which includes the referral of the individual to other appropriate programs.

13.3 Closure of Individuals who have achieved an employment outcome

In order to determine that an individual has achieved an employment outcome, the case record must document:

- A. That services provided under the IPE contributed to the achievement of the employment outcome
- B. That the employment outcome is consistent with the individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice
- C. That the employment is in the most integrated setting possible, consistent with the individual's informed choice and if competitive employment, that the individual is compensated at or above the minimum wage and his/her wages and benefits are not less than that customarily paid by the employer for same or similar work performed by non-disabled individual.
- D. That the employment outcome has been maintained for a minimum of 90 days.
- E. The individual and the VR counselor consider the employment outcome to be satisfactory and agree that the individual is performing well on the job. Whenever possible, confirm that the employer is satisfied with the work performance of the individual as well as IDVR services.
- F. That an assessment occurred regarding whether a need exists for Post-Employment Services and that the individual was informed regarding the purpose and availability of post-employment services, should the need arise; and
- G. That the individual was provided a written notification of closure outlining rights at closure.

13.3.1 Closure of Individuals in Supported Employment

Individuals in supported employment are determined rehabilitated when the objectives of the IPE for supported employment training are achieved and a plan for extended support services is verified through the activation of services related to the long-term source of support.

SECTION 14.0 PURE STATE KIDNEY – (PSK)

14.1 History of Pure State Kidney (PSK) Program

In 1970, the Idaho Legislature established a program for lifesaving care and treatment for persons with chronic renal diseases who are unable to pay for medical treatment on a continuing basis. There are no age restrictions. IDVR administers this program.

Idaho Code, Chapter 23, Vocational Rehabilitation 33-2307 to 33-2308.

- 33-2307. Care of persons suffering from renal diseases – Legislative intent. – It is the intent of the legislature of Idaho to insure the establishment of a program for the care and treatment of persons suffering from chronic renal diseases. This program shall assist persons suffering from chronic renal diseases who require lifesaving care and treatment for such renal disease, but who are unable to pay for such services on a continuing basis. [1970, ch. 72, sec. 1, p. 186]
- 33-2308. Establishment of vocational rehabilitation program to provide treatment to persons suffering from chronic renal diseases. – The Board for Professional Technical Education shall establish a vocational rehabilitation program to provide treatment to persons suffering from chronic renal diseases, including dialysis and other medical procedures and techniques, which will have a lifesaving effect in the care and treatment of persons suffering from these diseases. The board shall extend financial assistance to persons suffering from chronic renal diseases in obtaining the medical, nursing, pharmaceutical, and technical services necessary to care for such diseases, including the rental or purchase of home dialysis equipment and supplies. The board shall establish standards for determining eligibility for care and treatment under this program in order that treatment shall be provided to those who are financially unable to obtain such treatment without causing severe economic imbalance in the family economic unit. Such standards shall be established without reference to maximum or minimum income levels. [1970, ch 72, sec 2, p.186.]

14.2 To be eligible for PSK Services, the participant must:

1. Have a diagnosis of chronic end stage renal disease (ESRD) by M.D.
2. Meet residence requirements:
 - must live within the state for 12 consecutive months, or
 - must maintain permanent residency in the state of Idaho, although may be temporarily absent, or
 - applicant or a spouse, parent or guardian must show proof of employment or offer of employment in Idaho prior to moving to the State.

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3. Demonstrate financial need (Gemini 12 – FNA must be taken on all PSK clients including those on SSDI).
4. Demonstrate no vocational potential or be currently employed but is unable to afford kidney related expenses on a continuing basis.
5. Have applied for and be receiving Medicare.

Use of IDVR Medical Consultant (if needed).

- To clarify diagnosis to insure that it is chronic ESRD.
- To establish functional limitations that preclude vocational potential.
- To insure that proposed medical treatment is related to chronic ESRD.
- To insure that prescribed medications are related to chronic ESRD.

14.3 Comparable Benefits

Comparable benefit search must be documented in file: what benefits participant is eligible for and receiving.

1. VR requires all PSK participants to apply for and be receiving Medicare. Medicare, a federal health insurance program, provides benefits for people with ESRD.
2. All participants must apply for all Health and Welfare benefits, including Medicaid, Qualified Medical Benefits (QMB), and Specified Low Income Medical Beneficiary (SLMB). Verification of denial required if not eligible for Medicaid.
3. Participants must apply for Veteran's benefits, if applicable.
4. Participants must apply for Indian Health Service for Native American participants, if applicable.
5. The VR representative and participant should investigate Medicare Part D and private insurance as a comparable benefit. IDVR may pay insurance premiums if this is more cost-effective than paying for individual medical services. VR may pay up to the full amount for insurance premiums.
6. The VR representative and participant should explore and review all information available on comparable benefits and cost-saving programs.

14.4 Service Delivery

1. Eligibility and plan development need to be accomplished as quickly as possible.
2. Once eligibility has been established, PSK services can be back-dated to the date of application. However, generally prior authorization for services is expected.

Remember, to be eligible for PSK, participant must have applied for and be on Medicare.

3. The VR representative needs to establish a good working relationship with medical professionals and social workers. IDVR encourages the most cost-effective dialysis option suitable to the participant's medical needs.
4. IDVR will only pay for services that are related to or caused by chronic ESRD.
5. IDVR will only pay for medications that are related to chronic ESRD.
6. Case file must contain justification of eligibility for PSK program and written plan for services (Gemini 34) including comparable benefit search.
7. Yearly update and review of plan and financial need is required.

14.5 PSK Services

IDVR pays "usual and customary" charges to vendors for PSK services for participants except for the following list.

1. Dialysis and supplies – either in-center, during hospital stay, or in-home.

Maximum: \$350 per month.

(If the participant were hospitalized, dialysis cost would be covered entirely by Medicare after deductible is met. VR may pay total Medicare deductible.)

2. Medications related to ESRD.

Maximum: \$400 per month.

3. Hospitalization (not dialysis, but ESRD related)

VR may pay total Medicare deductible.

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4. Nephrologist or primary ESRD physician monthly follow-along visits for in-center or home dialysis.

Maximum: \$40 per month.

5. Surgeon's fee for shunt revision.

Maximum: \$100 per shunt revision.

6. Medigap and/or Medicare Part D (supplemental) insurance premiums, if cost effective.

VR may pay full amount.

7. Transportation

Maximum: \$200 per month or actual cost of public conveyance (bus or van).
VR does not pay transportation if participant is eligible for Medicaid.

VR does not pay for the following:

1. Ensure or any other dietary related products.
2. Herbs.
3. Prosthetics/orthotics.
4. Medicare premiums.
5. Family members as dialysis technicians.
6. For Medicaid recipients, all dialysis, medication and transportation costs are paid by Medicaid (don't open VR PSK case).
7. If Epogen is medically necessary, participant needs to dialyze in hospital, as Medicare will pay.
8. Medications for non-ESRD related conditions.
9. Any doctor fees other than nephrologist and surgeon for shunt revision and the monthly follow-along visits.
10. Hospital charges for shunt revision.

Transplant Costs

1. VR will **not** provide any services for participant to get on the transplant list.
2. If participant is on the transplant list, VR may pay for services that the nephrologist or primary ESRD physician recommend for the transplant:

(eg. dental work, visual exam and x-rays)

Most of this is covered on the pre-transplant list, which VR does not pay for.

3. For the transplant and immediate aftercare, VR may pay for:
 - Transportation
 - Per diem
 - Lodging (usually hospice)
 - Family member to accompany participant. Costs will be negotiated with the participant in the best interest of the agency.
4. Post Transplant:
 - VR may pay transportation costs up to 12 months for medical follow up visits.
 - VR may pay for Medication (other than anti-rejection).

Maximum: \$400 per month

- Physician follow-up is covered under original cost of transplant.
- VR **does not** pay for anti-rejection medications since Medicare pays for them for three years after transplant, then participant can apply to pharmaceutical indigent drug programs.

14.6 General Guidelines

If a participant has:

1. Full coverage Medicaid – don't open PSK file.
2. Only Medicare – VR may pay up to the \$350 maximum for dialysis/hospitalizations. VR may pay all monthly ESRD related follow-up doctor visits up to \$40/month maximum.
3. Medicare and insurance supplement – VR may pay the deductibles for both for the year. VR won't pay Medicare premiums, but may pay full premium for insurance supplement (Medigap and/or Medicare Part D).

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If participant is in the hospital for a kidney related problem (not dialysis but ESRD related), IDVR may pay the Medicare deductible. Medicare will cover the dialysis cost while in the hospital after the deductible is paid.

4. Medicare and VA – VR may pay 20% up to \$350 maximum plus Part A deductible of \$792 for hospital; Part B \$100 deductible; and meds up to maximum \$400/month.
5. Medicare and QMB – VR may pay medications up to \$400/month maximum.

Program Referral

Referrals can be made between the PSK and general VR programs.

- If PSK participant shows vocational potential, at any time, participant should be referred to the general Vocational Rehabilitation program.
- In Gemini, we have two case types, VR and PSK, consequently, a participant can have an open VR case and an open PSK case at the same time (while you are waiting for bills or Explanation of Benefits/EOBs).
- Participant may be referred from the general Vocational Rehabilitation program to the PSK program if participant has been rehabilitated but is unable to pay for kidney related medical treatment on a continuing basis or ceases to show vocational potential.

Types of Dialysis

There are three types of dialysis available to persons with end stage renal disease (ESRD).

1. Hemodialysis – Blood is pumped outside the body to an artificial kidney machine. The machine cleanses the blood and returns it to the body. Only a small amount of blood is out of the body at any time.

A fistula (the surgical linking of an artery to a vein) provides access to blood vessels. So does a graft (tubing surgically placed under the skin, linking an artery to a vein).

Hemodialysis can be done in-home or in-center.

2. Continuous Ambulatory Peritoneal Dialysis (CAPD) – Allows gravity to draw dialysis solution into and out of the peritoneal cavity, using a system of tubing and bags.

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With CAPD, tubing and a bag of sterile dialysis solution is connected to the peritoneal catheter. By raising the bag to shoulder level or higher, the solution flows into the peritoneum. When empty the tubing and solution bag are simply removed and thrown away.

During daily activities, the peritoneal membrane acts as a filter for the blood. Waste products and excess water transfer to the dialysis solution. After a few hours, new tubing and an empty bag are attached to the catheter. Then, the bag is lowered to drain the waste-filled fluid from the peritoneum.

3. Continuous Cycling Peritoneal Dialysis (CCPD) – This form of dialysis occurs inside the body. It uses the peritoneal membrane (the lining of the abdomen) as the filter. For this treatment, a tube called a catheter is surgically placed through the wall of the abdomen.

Special dialysis solution flows into the peritoneum through the catheter. Waste products and excess fluids pass from the blood, through the peritoneal membrane, into the dialysis solution. Then, they are drained from the peritoneal cavity. Peritoneal dialysis can be performed by hand or by using a machine. Tubing and bags are worn only during the solution exchanges.

Exceptions

Discuss any special circumstances with Zone Manager assigned to PSK.

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IDAHO DIVISION OF VOCATIONAL REHABILITATION

FFY 2008 - 2010

**STATE PLAN FOR THE
VOCATIONAL REHABILITATION SERVICES PROGRAM
AND
STATE PLAN SUPPLEMENT FOR THE STATE
SUPPORTED EMPLOYMENT SERVICES PROGRAM**

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Introduction

Overview

The Idaho Division of Vocational Rehabilitation (IDVR) is required to submit a State Plan to the Rehabilitation Services Administration (RSA) in Washington, D.C. to receive federal funding for Vocational Rehabilitation services. This is a requirement under Title I, Part B and State Plan Supplement for the State Supported Employment Services Program under Title VI, Part B of the Rehabilitation Act of 1973, as amended.

Timing and Process

IDVR and the State Rehabilitation Council (SRC) solicits public input from around the state through Town Meetings as part of the process to develop a final version of the State Plan. These meetings are intended to review concerns and positive comments of any member of the public, including individuals, organizations, and interested groups, regarding issues relating to the vocational rehabilitation of individuals with disabilities.

While IDVR is not required to make changes to the State Plan based on these recommendations, the Division is required to address each recommendation in an attachment to the plan. This attachment must include recommendations, which were incorporated into the plan as well as reasons for rejecting any of the advice or recommendations.

During FFY2007, IDVR was required to complete a triennial Comprehensive Needs Assessment, which is reflected in the current State Plan spanning FFY 2008-2010. As a result of this requirement, some attachments to the State Plan have been updated. Enclosed please find the following updated attachments:

Pre-Print Section 1

Attachment 4.2(c)

Summary of Input from State Rehabilitation Council for FFY 2007

Attachment 4.10

Comprehensive System of Personnel Development

Attachment 4.11(b)

Annual Estimate of Individuals to be Served and Costs of Services

Attachment 4.11(c) (4)

Goals and Plans for Distribution of Title VI, Part B Funds

Attachment 4.11(e)(2)

Evaluation and Reports of Progress

Lobby Certifications

It is the intent of IDVR to provide effective, efficient services to individuals with disabilities seeking employment. This intent is reflected in the goals, priorities and strategies delineated within the State Plan.

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STATE PLAN FOR THE STATE VOCATIONAL REHABILITATION SERVICES PROGRAM
AND
STATE PLAN SUPPLEMENT FOR THE STATE SUPPORTED EMPLOYMENT SERVICES PROGRAM

STATE: IDAHO

AGENCY: Idaho Division of Vocational Rehabilitation

AGENCY TYPE: GENERAL xx BLIND COMBINED

SECTION 1: STATE CERTIFICATIONS

- 1.1 The Idaho Division of Vocational Rehabilitation (DSU) (name of designated state agency or designated state unit) is authorized to submit this State Plan under Title I of the Rehabilitation Act of 1973, as amended¹ and its supplement under Title VI, Part B, of the Rehabilitation Act².
- 1.2 As a condition for the receipt of federal funds under Title I, Part B, of the Rehabilitation Act for the provision of vocational rehabilitation services, the Idaho State Board of Education (DSA) through IDVR (name of the designated state agency)³ agrees to operate and administer the State Vocational Rehabilitation Services Program in accordance with the provisions of this State Plan⁴, the Rehabilitation Act, and all applicable regulations⁵, policies and procedures established by the secretary. Funds made available under Section 111 of the Rehabilitation Act are used solely for the provision of vocational rehabilitation services under Title I of the Rehabilitation Act and the administration of the State Plan for the vocational rehabilitation services program.
- 1.3 As a condition for the receipt of federal funds under Title VI, Part B, of the Rehabilitation Act for supported employment services, the designated state agency agrees to operate and administer the State Supported Employment Services Program in accordance with the provisions of the supplement to this State Plan⁶, the Rehabilitation Act and all applicable regulations⁷, policies and procedures established by the secretary. Funds made available under Title VI, Part B, are used solely for the provision of supported employment services and the administration of the supplement to the Title I State Plan.
- 1.4 The designated state agency and/or the designated state unit has the authority under state law to perform the functions of the state regarding this State Plan and its supplement.
- 1.5 The state legally may carry out each provision of the State Plan and its supplement.
- 1.6 All provisions of the State Plan and its supplement are consistent with state law.
- 1.7 The State Treasurer (title of state officer) has the authority under state law to receive, hold and disburse federal funds made available under this State Plan and its supplement.
- 1.8 The Administrator (IDVR) (title of state officer) has the authority to submit this State Plan for vocational rehabilitation services and the State Plan supplement for supported employment services.
- 1.9 The agency that submits this State Plan and its supplement has adopted or otherwise formally approved the plan and its supplement.

(Signature)

Dr. Michael Graham
Typed Name of Signatory)

(Date)

Administrator
(Title)

¹ Public Law 93-112, as amended by Public Laws 93-516, 95-602, 98-221, 99-506, 100-630, 102-569, 103-073, and 105-220.

² Unless otherwise stated, "Rehabilitation Act" means the Rehabilitation Act of 1973, as amended.

³ All references in this plan to "designated state agency" or to "the state agency" relate to the agency identified in this paragraph.

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- ⁴ No funds under Title I of the Rehabilitation Act may be awarded without an approved State Plan in accordance with Section 101(a) of the Rehabilitation Act and 34 CFR part 361.
- ⁵ Applicable regulations include the Education Department General Administrative Regulations (EDGAR) in 34 CFR Parts 74, 76, 77, 79, 80, 81, 82, 85 and 86 and the State Vocational Rehabilitation Services Program regulations in 34 CFR Part 361.
- ⁶ No funds under Title VI, Part B, of the Rehabilitation Act may be awarded without an approved supplement to the Title I State Plan in accordance with Section 625(a) of the Rehabilitation Act.
- ⁷ Applicable regulations include the EDGAR citations in footnote 5, 34 CFR Part 361, and 34 CFR Part 363.

Attachment 4.2[c]

**SUMMARY OF INPUT FROM STATE REHABILITATION COUNCIL
FOR FY 2007**

Agency central office staff, including the administrator, attend SRC meetings that are held four times each year. This provides for the opportunity to discuss items regarding policy and the operation of the Agency.

The Council completed a Consumer Satisfaction Survey this past fiscal year of past or present VR Consumers. The results were shared with the Agency as well as members of the Council.

The Council attended the Agency annual in-service training and awards banquet. This provided the Council with the opportunity to discuss information with all of the staff of the Agency.

The Agency provides the Council with updates on compliance with CSPD requirements and other Human Resource actions.

The Council is given the opportunity to provide guidance on issues.

The Council is given the opportunity to provide input in the Agency's annual budget which is presented to the state legislature. Some members of the Council were able to make direct contact with the legislature to advocate for the budget.

The Council has been provided with the opportunity to review and provide input into the Agency's State Plan as well as the Strategic Plan.

Some members of the Council are invited to attend CSAVR meetings and to become aware of issues that face the Agency at the National level.

The Agency routinely invites the SRC Chair to attend management meetings. The Council is given the opportunity to provide input on issues related to policy and procedures within the Agency. This establishes a solid relationship with field management. SRC members then visit field offices to further discuss issues and policy implementation.

Members of the Agency management team give presentations to the Council in their area of stewardship to help keep members of the Council up to date on issues and policies.

The Agency Administrator initiates and maintains contact with the SRC Chair to share ongoing issues. The Chair was invited to participate in a webinar with new employees.

The Agency and the SRC maintain mutual contact with the RCEP to help in the development of new SRC members and to assure ongoing improvement of the SRC.

ATTACHMENT 4.7(b) (3)

STATEWIDENESS AND WAIVER OF STATEWIDENESS

The Division provides services in one (1) or more political subdivisions of the State that increases services or expands the scope of services that are available statewide under this State Plan and:

- (1) The Division verifies in the specific Memoranda of Agreement (MOAs) (see included attachments) that the contributions of these political subdivisions are certified as non-federal dollars attached for services, including funds contributed to a local agency by a private agency, organization or individual, and
- (2) The Division ensures that the services are likely to promote the vocational rehabilitation of substantially larger numbers of individuals with disabilities or of individuals with disabilities with particular types of impairments, and
- (3) The Division ensures that all services administered are in full agreement with the rules and regulations governing General Vocational Rehabilitation Programs and that the DSU is in full agreement with the provision of those services.

The Division continues to note an increase in the number of Corrections clients being referred to the Division for services. There are two identified areas in the state where correctional facilities are housed that require additional VR staff and resources to ensure that adequate vocational services are provided to the corrections population. This staff works solely with the Corrections population. To meet this need, an MOA with the Idaho Department of Correction (IDOC) was developed to provide comprehensive vocational rehabilitation services to felony clients/offenders both in an IDOC institution and in the community to prepare these individuals for reentry into the community by providing IDVR services. This MOA covers Correctional institutions in the Boise and Pocatello areas only. The IDOC pays a lump sum of \$60,000 certifiable non-federal monies toward the case service costs encumbered in both areas.

The prison system of Idaho concentrates most of its offenders in the four institutions in the Treasure Valley requiring a focused approach from IDVR in the southwest region of the state. Dedicated counselors partially paid by the Idaho Department of Corrections are located with offices housing probation and parole officers. These six counselors also have offices or significant office hours located within the prison facilities for needed access to offenders prior to their release. The arrangement facilitates both quality and productivity on the part of IDVR counselors. An ongoing supportive partnership is reinforced from the co-location of staff and strengthened by the financial buy in from IDOC.

In both the northern and eastern part of the state, there are fewer residential facilities for imprisoned offenders. In the case of the northern part of the state, two facilities are located there and most offenders, if released from one of the facilities, are likely to relocate in the Treasure Valley. Consequently our counselors in the Treasure Valley tend to pick up clients from these

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facilities located in other parts of the state. On those occasions when offenders are released and remain in the northern or the eastern portion of the state, referrals are generally made to IDVR from Correction's personnel and these offenders begin an open case with the local counselors. This means all the typical services provided to the general population are also provided to the corrections clients in the offices outside of the Treasure Valley.

Due to the rural nature of Idaho and the increased travel time associated with serving the School/Work (transition) population, additional resources are necessary in certain areas of the state to ensure the needs are met. In collaboration with Special Education and IDEA, as well as federal initiatives, the Division has developed cooperative agreements with school districts in various areas throughout the state to provide comprehensive vocational rehabilitation services to students with disabilities to prepare these individuals for transition to work. A designated VR counselor and staff member are assigned to a consortium affiliated facility to better serve clients in the respective areas. The school districts will pay a total of \$182,337 in certifiable non-federal monies to IDVR to be used expressly for allowable costs incurred by IDVR in the implementation of the cooperative agreement. All parties have agreed to and signed the memoranda agreement. The memoranda cover the following areas of the state:

- Region I – Coeur d'Alene – Two Projects
- Region II – Lewiston – One Project
- Region III – Boise East – Five Projects
- Region IV – Twin Falls - One Project
- Region V – Pocatello - Two Projects
- Region VI – Idaho Falls - One Project

It is worth contrasting the services in the regions of the state covered by the MOUs versus those not covered. The majority of the state high schools are covered by the transition agreements in the state. Those not covered by the approach tend to be smaller school districts or out of the way communities, although this isn't always true. First of all, any individual school district might participate in the arrangement. IDVR counselors are located or reside in high schools participating in the project. This provides an easy access to the transition age students eligible for IDVR services. The office space, phones and utilities are provided by the various schools where our counselors are located. These counselors carry a full caseload of transition students and are not dedicated to the general population eligible for IDVR services. The counselors keep the students on the caseload until they are closed by a successful rehabilitation or from failure to successfully complete the rehabilitation process. An important aspect of this agreement that is not feasible for a general counselor is the creation of a close working relationship with school personnel, more timely referrals, better support throughout the rehabilitation process, easy access to pertinent school staff, and the expertise that comes with specialization. The arrangement has proved important in developing an excellent working relationship between IDVR staff and school districts across the state.

In school districts not covered by the inter agency agreements, students are referred by school counselors, special education teachers, or by word of mouth to IDVR. In such cases all of the normal and appropriate activities and services are provided by the DSU. In these regions of the state the counselor carries a general caseload with some transition age students. There is no

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service offered under the MOUs not also made available by the counselors providing services in the areas not covered by the MOUs. One difference however, must be mentioned. The counselors with full time caseloads of transition age youth typically become experts in providing services to this specialized caseload. At one time our agency believed this caseload would not be as productive as general caseload counselors, but the notion was proved wrong by several of the transition specialist counselors in recent years.

Individuals with mental health issues have been historically underserved in Idaho. To ensure that the needs of this population are adequately met, the Division has developed an Interagency Agreement with the Idaho Department of Health and Welfare, Division of Behavioral Health, Adult Mental Health to provide vocational rehabilitation services to Idahoans experiencing severe and persistent mental illness who are eligible for vocational rehabilitation services. A designated VR counselor and staff member are assigned to a consortium affiliated facility to better serve clients in the respective areas. The Department of Health and Welfare pays IDVR \$196,730 in certifiable non-federal monies for services executed under this Interagency Agreement. Both parties have agreed to and signed the memorandum. This Interagency Agreement covers the following areas only:

- Region I – Coeur d’Alene
- Region II – Lewiston
- Region V – Pocatello
- Region VI – Idaho Falls
- Region VII – Caldwell
- Region VIII – Boise West

Idaho is presently developing a system of mental health courts modeled after drug courts for those with persistent and severe mental illness (SPMI) disabilities. So far all of the mental health courts are located in geographic areas covered by our inter agency agreements. The new system in conjunction with our counselor’s efforts is proving useful in the rehabilitation process for consumers for whom success is most elusive.

In the regions of the state not covered by the interagency agreements SPMI consumers meet with general case load counselors and begin the normal rehabilitation process from application, to eligibility, plan development, service provision, placement, and eventual closure. In such cases the consumer is provided all the normal individualized services, however, is not able to access the counselors with the greatest expertise and specialization for MI. Additionally, the specialized counselors have developed a close working relationship with their respective regional mental health providers which encourages more timely referrals and better support through out the rehabilitation process. It is noteworthy that one of our main population areas of Twin Falls does not have an inter-agency agreement between mental health and IDVR.

Special program assessments are conducted to assess the service impact on this population. Ongoing monitoring is accomplished by the Field Services Chief.

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The following statements are included in the MOAs referenced in this attachment 4.7(b)(3) specifying that only certifiable non-federal monies will be transferred to IDVR: (See exhibit to State Plan)

School-Work MOA:

“School District agrees to transfer to IDVR \$15,600 for SFY 2007, upon receipt of appropriate billing, of certifiable non-federal monies which IDVR shall use to match available federal monies appropriated under the Rehabilitation Act. These monies will be used expressly for allowable cost incurred by IDVR in the furtherance of this cooperative agreement.” (This is a sample of verbiage utilized in all School/Work memoranda).

Mental Health MOA:

“H&W Behavioral Health Agrees to transfer to IDVR, upon receipt of an appropriate billing, \$196,730 of certifiable non-federal monies that IDVR will use to match federal monies appropriated under the Rehabilitation Act to be used expressly for allowable costs incurred in the discharge of this Agreement”.

Corrections MOA:

“IDOC agrees to transfer to IDVR, upon receipt of appropriate billing, \$60,000 certifiable non-federal monies that IDVR may use when available to match federal monies”.

Attachment 4.10

COMPREHENSIVE SYSTEM OF PERSONNEL DEVELOPMENT

Data System

Collection and analysis of data on qualified personnel needs and personnel development consistent with the provisions of 34 CFR 361.18 (a) includes the following activities:

- Analysis of current and future staffing needs continues through periodic reviews of turnover rates, promotions and transfers. Anticipatory staffing analysis is ongoing.
- During FFY 2007, the Idaho Division of Vocational Rehabilitation (IDVR) turnover rate for Vocational Rehabilitation Counselors (VRCs) was 18.3%. The overall turnover rate for all Vocational Rehabilitation staff was 21%. It is projected over the next five (5) years that the turnover rate for VRC's will be between 15% and 20%.
- In the next five (5) years, three (3) out of IDVR's nine (9) Regional Managers will likely retire. Steps have been taken to provide leadership opportunities to VRCs interested in management. The position of Assistant Regional Manager is one such position that offers management experience.
- IDVR has a continuing need for increased numbers of vocational rehabilitation staff. The Division attempted to secure these additional positions this year through the Idaho Legislature, but was unsuccessful. Currently, IDVR does not have authority or additional funds from the State legislature to increase the number of positions within the agency.
- Idaho continues to be one of the fastest growing states in the nation. Idaho was named the fourth fastest growing state in the nation.
- The agency has determined that a ratio of one (1) counselor for every 20,000 people in the state would be an ideal staffing ratio. The population of Idaho is approximately 1.5 million people, thus a minimum of seventy five (75) counselors over the next five years would be required to meet this ratio. IDVR currently has 72 counselors, thus an additional 3 counselors are needed.
- Tracking, monitoring and reporting of individual academic preparation, certification pursuits and Continuing Education for VRCs is regularly maintained by IDVR.
- IDVR has one hundred and forty-eight (148) employees; one hundred and twenty-eight (128) of these are Field Staff that comprise of nine (9) Regional Managers, three (3) of which are Zone Managers; seventy-two (72) VRCs; and forty-five (45) Office Services Personnel. IDVR also has one (1) Migrant Service Coordinator serving under the MSFW grant and one (1) Employment Developer position.
- The ratio of VRCs to individuals served is 1:175. An optimal caseload size is approximately one hundred and twenty-five (125). IDVR is currently exploring avenues to ensure client needs are met despite limitations on the numbers of VRCs that can currently be hired. IDVR will continue to work through the Idaho Legislative process to secure additional rehabilitation staff.

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Recruitment and Retention

Plan to address current and projected needs for qualified personnel include the following activities:

- IDVR maintains periodic contact with regional universities and gathers information about the numbers of individuals who will be graduating from rehabilitation programs. During the spring 2008 semester the number of individuals anticipating graduation from accredited universities with a Master's Degree in Rehabilitation Counseling are: Western Washington (33), University of Idaho (18), University of Arkansas (9), Utah State University (15), San Diego State University (38), University of Wisconsin-Stout (27), and New Mexico Highlands (10).
- Periodic site visits are conducted at the University of Idaho. IDVR staff meets with students and faculty in order to establish relationships and initiate recruitment activities with current graduate students.
- IDVR provides feedback to the Rehabilitation Counseling Coordinator at the University of Idaho on existing and future staffing needs, including individuals with disabilities and from minority backgrounds for capacity building. In addition, IDVR critiques program content and advises Coordinator on areas needing attention for successful placement of graduates within the Division.
- Periodic contact is made with Western Washington University, University of Idaho, Portland State University, University of Arkansas, Utah State University, University of Northern Colorado at Greeley, San Diego State University, University of Wisconsin Stout, University of Arizona, Montana State University at Billings, New Mexico Highlands University, Texas Tech University, and University of Texas Pan Am. The Division has developed a process whereby each of the nine (9) Regional Managers, the HR Manager and the IDVR Administrator is assigned to different universities that have a Masters Level Rehabilitation Program for recruiting purposes. Each will maintain ongoing relationships to promote communication concerning vacancy announcements and to develop and maintain a pool of qualified VRC applicants. They keep in contact with key personnel at each university, i.e., Department Head and Internship Coordinator.
- IDVR continues to face challenges in recruiting qualified applicants. The entry-level wage for VRCs is lower than comparable state and private positions.
- All Regional Managers, Central Office Management and staff complete recruitment activities. Development of recruitment and marketing plans continue to be a priority, which will assess the effectiveness of the Division's new strategies.
- Professional organizations such as the local chapter and the national chapter of the National Rehabilitation Association assist in promoting agency recruiting efforts.
- IDVR participates in Career Fairs to encourage and seek out individuals from diverse backgrounds including individuals with disabilities and from minority backgrounds.
- IDVR conducts exit interviews with staff, when possible, to determine whether there are areas of concern affecting staff retention that need to be addressed.

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Personnel Standards

Establishment and maintenance of personnel standards includes the following activities:

- The standards established by IDVR for academic requirements of VRCs, Regional Managers, and Field Services Management staff include graduation from an accredited university with a Master's Degree in Vocational Rehabilitation Counseling and/or a Certified Rehabilitation Counselor (CRC) designation obtained by the Commission on Rehabilitation Counselor Certification (CRCC).
- Due to the limited pool of recruits for the VRC position, we will consider hiring an individual who does not have their Master's Degree in Rehabilitation Counseling or meet the CRC Certification. Before an individual is hired, they agree to obtain their Master's in Rehabilitation or be eligible for the CRC Certification within five years of their hire date.
- If we were to hire an individual that does not meet the standards, importance is placed on experience and special skills, i.e., Spanish speaking, sign language proficient, extensive employment history that encompasses specialty areas such as Corrections, School Work Transition, etc.
- IDVR sets CSPD goals with each individual counselor and for those counselors who do not meet CSPD.
- There are currently fifty-one (51) VRCs who meet the standard and twenty-one (21) who do not meet the standard.
- IDVR initiated a policy that allows counselors who are currently employed but do not currently meet the certification standards to complete the credential requirement within five years. If the VRC fails to meet the standards in the allotted time frame, the individual is re-classified to a Vocational Rehabilitation Specialist designation. In that capacity, the individual is restricted in his/her professional latitude to approve eligibilities, IPEs and case closures. These rights will be re-instated once the individual achieves the required credentials.
- The designation of CRC is required for all VR counselors, regional managers, field services managers, bureau chief position, employment developer, planning and evaluation manager, and the human resources manager.
- Regional Managers conduct bi-annual assessments of progress towards meeting the CSPD timelines and report outcomes to the HR Manager.
- Remaining IDVR staff positions, not specifically named in this section, are required to meet the State of Idaho minimum standards set for each position description.
- IDVR provides continued counseling to employees (VRC) on Division expectations for meeting the requirements as defined by Federal regulations of a Qualified Rehabilitation Professional (QRP) and formalized plans for achieving the goal.
- IDVR provides financial support through funding from the Basic Support and In-Service Training Grants for coursework to support counselor objectives in meeting CSPD requirements. In FFY 2007, \$35,500 was spent to support this effort.

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Staff Development

Activities for staff development to ensure all personnel are receiving appropriate and adequate training include the following:

- Tracking, monitoring and reporting individual training and development of all Vocational Rehabilitation staff. During FFY 2007 a software program was developed by the IDVR IT department that allows staff to electronically request training. In addition, it provides a way to track and monitor all training activities.
- An annual training needs assessment is conducted in order to identify and develop training curriculum. Identified areas of need include co-occurring disorders, time management, offender training, supervisory skills, assistive technology, caseload management, critical case questioning, and ethics.
- At the annual in-service topics such as conflict resolution, employment strategies for hard of hearing and deaf clients, stigma: a barrier to everyday lives, assistive technology, schizophrenia virtual reality, sex offenders/return to the work place, methamphetamine/overview and vocational implications, dealing with difficult people, stress management/resilience, co-occurring disorders and vocational implications and many others were provided. Throughout the year training requests are approved for individual staff to attend training on areas of interest or need. Topics have included; transition for school-work clients, drug and alcohol dependency, risk assessment of violence, generations and diversity, learning styles, understanding and coping with stress/burnout, job placement and support for people with psychiatric disabilities, social security incentives, motivational interviewing, self-employment and job development strategies and total immersion sign language.
- Participation in extensive training for enhancing technological skills.
- Management development training for VRCs and other staff members to enhance skills for current jobs or future advancement opportunities. Participation in Orientation to Leadership and Emerging Leaders training by the Northwest Region CCER Leadership Institute and management and supervisory skill development provided by the Idaho Division of Human Resources.
- Identifying and/or developing staff in particular subject matters to develop potential trainers or facilitators within IDVR for staff training. Areas developed are Caseload Management and Critical Case Questioning. Training topics being explored and/or developed include; SSA/SSI/SSDI, Adult/Juvenile Corrections, School-Work Transition, Mental Health and Pure State Kidney.
- Current VRA employees successfully completed the comprehensive training program and have successfully transitioned to their current paraprofessional status. In addition, all new VRA employees are required to complete this training by taking the four courses of study as follows: Disability History, Developing Collaborative Relationships, Sticky Situations, and Developing Cultural Competence within the first year of employment.

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Communication with Diverse Populations

Activities to ensure employment of personnel who are trained to communicate in special languages are as follows:

- Continued participation in state/regional conferences on Hispanic culture and issues.
- Recruit and place candidates fluent in Spanish for specific areas of the State to serve the needs of the Hispanic community.
- Since Idaho has a separate entity that addresses issues related to low vision and blindness, IDVR does not provide specific training to its staff in Braille.
- Training is provided in the area of deaf and hard of hearing as needed.

Attachment 4.8(b)(1), (2), (3) and (4):

4.8 COOPERATION, COLLABORATION, AND COORDINATION

In 2005, Governor Kempthorne consolidated six former workforce investment areas into two. The Workforce Development Council is now the sole workforce investment board in the state to oversee a statewide regional planning area. This requires the Council to exercise special responsibility for development and oversight of the state's workforce development infrastructure and program. As a result of this consolidation, there is a single memorandum of understanding (MOU) that includes all Workforce Investment System partners. The purpose of this MOU is to establish the framework for operation of the One Stop system in a manner that maximizes services to system customers while making efficient use of public resources.

The following statement from the Agreement summarizes the intent and purpose of this statewide partnership:

"This Memorandum of Understanding (MOU) is entered into in the spirit of cooperation and collaboration by the Workforce Development Council, hereafter referred to as "the WDC" and the One Stop delivery system signatory partners, hereafter referred to as "the One Stop partners" or "partners" to describe how their various funding streams and resources will be utilized to better serve their mutual customers, both job seekers and employers, through an integrated system of service delivery operated at comprehensive sites known as *IdahoWorks* Career Centers and satellite sites, called *IdahoWorks* Career Connection sites. It is understood that the development and implementation of these Centers will require mutual trust and teamwork among the One Stop partnering agencies and the WDC, working together to accomplish the shared goals."

4.8(b)(1) COOPERATION AND COORDINATION WITH OTHER AGENCIES AND ENTITIES

The Idaho Division of Vocational Rehabilitation (IDVR) and the following entities have entered into formal agreements, which outline the specific activities expected of each partner. The agreements outline goals, planning processes, information sharing and confidentiality, technology, continuous improvement and accountability, service delivery support, cost sharing, annual action plans, duration, amendments, termination/conflict resolution. These entities include:

CAP - Idaho Client Assistance Project

This Agreement outlines the interaction between IDVR staff and CAP staff for the improvement of services to people with disabilities in Idaho served under the VR program.

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Department of Health & Welfare – Division of Health – Idaho Children’s Special Health Program

The Idaho Children’s Special Health Program was formally known as Cripple Children’s Services with the Shriners’ Hospitals. The Agreement facilitates the referral of children ages 16 to 18 with significant disabilities to the IDVR program. It indicates we will work together to ensure appropriate transition to adult life to eligible youth. It further agrees that those needed and allowable services not covered by the existence of comparable benefits or other resources (as defined by the Act’s implementing regulations) will be covered by IDVR.

Idaho Industrial Commission

This Agreement outlines the relationship between IDVR and the Industrial Commission with regard to persons injured on the job who may also have other non-work related injuries. The Industrial Commission will be the lead agency for injured workers in Idaho and will refer them to IDVR when they are unable to return to previous or similar employment due to the work related injury.

Idaho Health & Welfare, Division of Behavioral Health, Adult Mental Health (Yearly updated Agreement)

The Idaho Division of Vocational Rehabilitation (IDVR) and the Idaho Department of Health and Welfare, Division of Behavioral Health, Adult Mental Health enter into this Agreement for the express purpose of better serving Idahoans experiencing severe and persistent mental illness. A team approach will be used to ensure that the Idahoans served by this Agreement will benefit as to remaining de-institutionalized and successfully integrated into their respective communities from a psychological, psychosocial, and employment perspective. Those consumers who have a severe and persistent mental illness deemed not eligible for this program will be referred to the general IDVR program. Those consumers who have a severe and persistent mental illness deemed ineligible for this program or IDVR services will be referred to appropriate resources for assistance.

Tribal VR – (Nez Perce Tribe) (Coeur d’Alene Tribe)

The intent of these Agreements is to develop and implement a cooperative system for providing vocational rehabilitation services to eligible American Indians with disabilities and to promote and enhance to the greatest extent possible vocational rehabilitation services like that of those provided by the State of Idaho. The IDVR has the basic responsibility to provide rehabilitation services to all eligible individuals of Idaho. The Nez Perce Tribe as well as the Coeur d’Alene Tribe, through a Federal Section 121 grant, will work cooperatively with IDVR.

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Idaho Department of Commerce & Labor /Data Sharing

This Agreement provides for disclosure of employment security information by the Idaho Department of Labor to IDVR for the purpose of evaluating participants' acquisition and retention of employment and earnings. The Agreement also enables IDVR to meet federal reporting requirements under Section 106 of the Rehabilitation Act as amended by Title IV of the Workforce Investment Act of 1998.

State Use Contracting Programs

The State of Idaho has a 1973 statute referred to as the "Use Law". A council appointed by the governor facilitates the sale of goods and services from thirteen (13) Community Rehabilitation "Not for Profit" Programs. A cooperative agreement is not necessary.

Community Rehabilitation Programs

IDVR does not have contracts with Community Rehabilitation Programs as services through these entities are provided on a fee for service basis.

Idaho Department of Corrections (IDOC)

This Agreement established the guidelines to provide comprehensive vocational rehabilitation services to adult, felony clients/offenders both in an IDOC institution and in the community.

Idaho Department of Juvenile Corrections (IDJC)

This Agreement established the guidelines to provide comprehensive vocational rehabilitation services to juvenile offenders, both in an IDJC institution and in the community.

4.8(b)(2) COORDINATION WITH EDUCATION OFFICIALS

Universities, Colleges and Professional Technical Programs in Idaho under the State Board of Education

These Agreements provide coordination of services between IDVR and the universities and colleges in Idaho, so that students with disabilities can succeed in an environment of higher education as outlined in CFR361.22.

The Cooperative Agreements with Colleges and Universities outline information regarding consultation and technical assistance, roles, responsibilities, including financial responsibilities of each, and procedures for outreach to and identification of students with disabilities who need services.

Idaho Department of Education – Secondary Transition

This Agreement deals with our mutual definition of secondary transition and the cooperative delivery of services to transitioning students with disabilities. It outlines the provision of services required from local school districts, IDVR and Idaho Commission for the Blind and Visually Impaired, roles and responsibilities of each agency including

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financial responsibilities, provisions for determining state lead agencies and qualified personnel responsible for transition services.

The parties enter into these agreements solely to facilitate the transition of students with disabilities from K-12 public education into adult life. This transition to adult life may involve any or all of the following goal oriented activities: post-secondary education, training and job placement, direct placement into appropriate employment (to include supported employment if required), consultation and technical assistance to assist educational agencies in planning for the transition of students with disabilities, advocacy and any other activities that are relevant to the student and within the scope of the IDVR mission and role.

This Agreement with the Idaho Department of Education and education officials ensures a coordinated, comprehensive system focusing on youth with disabilities as they transition from secondary school to post-school activities, promoting post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, and community participation emphasizing a team approach to facilitate the transition of students with disabilities from public education into employment. Roles and responsibilities, including financial responsibilities, of each agency, including provisions for determining state lead agencies and qualified personnel responsible for services are outlined as well. This Agreement also includes referrals of students with disabilities (e.g. physical, medical) who are not eligible for special education services, and students who have a 504 Plan (Rehabilitation Act of 1973), to IDVR for determination of eligibility for vocational rehabilitation services.

This Agreement outlines the local education agency responsibility for the purchase of assistive technology equipment that is required for educational purposes. The Agreement also outlines IDVR responsibility for the purchase of any assistive technology device of equipment that may be necessary for the student's eventual employment. The Agreement also provides a protocol for discounting the cost of equipment purchased by the school for repurchase by IDVR to be utilized in an employment program.

Additionally, IDVR will accept referrals within 2 years prior to the student exiting high school (or earlier if appropriate), determine eligibility and collaboratively, with input from the students' Individualized Education Program (IEP) Team, develop Individual Plans for Employment (IPEs).

School-Work Transition Cooperative Agreements

IDVR has entered into twelve consortium assignments that span a myriad of school districts in both rural and metropolitan areas. While these projects represent a substantial segment of the agency's services to the transitional population, the Agreement referenced

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above relates to services in all districts across the state. The Agency's consortium projects include:

- Panhandle Consortium (Region I)
- Coeur d'Alene/Post Falls School-Work (Region I)
- Lewiston School-Work (Region II)
- Local Consortium of Southern Idaho School Districts (Region IV)
- Southern Counties Consortium of Schools (Region V)
- Pocatello School-Work (Region V)
- Greater Opportunities to Achieve Life Skills Consortium School Districts (Region VI)
- Canyon, Owyhee and Gem School Districts (Region III)
- Nampa/Vallivue School District (Region III)
- Meridian Joint School District #2 (Region III)
- Boise School-Work (Region III)
- Mt. View School-Work (Region III)

IDVR also has individual cooperative agreements with other educational entities throughout the state. The goal of these cooperative agreements is to provide the necessary coordination of services at a local level, which will assist eligible individuals who have disabilities in an educational environment. These agreements are specific in terms of program and financial responsibilities of each party and include:

Idaho Interagency Council on Secondary Transition

IDVR continues to be involved in the Idaho Interagency Council on Secondary Transition with the purpose of ensuring that youth with disabilities experience a collaborative, comprehensive system that facilitates a smooth transition from secondary school to adult life. The goal of this group is to provide and promote a common conceptual framework that leads to opportunities for youth with disabilities in community living, recreation, continued education, and employment. Interagency cooperative planning, information sharing, and the collaborative use of resources will help accomplish our mission at the state and local level.

Idaho School for the Deaf & the Blind (ISDB)

This Agreement establishes guidelines to facilitate the referral of ISDB students to IDVR and to coordinate the provision of services when students are mutual clients of both agencies.

4.8(b)(3) COOPERATIVE AGREEMENTS WITH PRIVATE NON-PROFIT VOCATIONAL REHABILITATION SERVICE PROVIDERS.

IDVR does not establish cooperative agreements with private non-profit vocational rehabilitation service providers as we purchase services on a fee-for-service basis.

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IDVR has implemented two reimbursement methods with private, non-profit Community Rehabilitation Programs (CRP). These include contracts for services provided on an incremental basis (payments following the provision of selected services) as well as fee-for-service.

IDVR and the two statewide CRP associations continue to conduct annual trainings and workshops, the main purpose of which is to solidify and improve collaborative relationships for the enhancement of service delivery to individuals with disabilities.

The major areas of focus within the workshops include:

1. Social Security Work Incentives
2. Contract issues as well as fee-for-service reimbursement issues
3. Methods to improve the partnerships through open communication
4. Strategies to improve provider program outcomes

All new providers of service for IDVR consumers must go through a certification and approval process. The Chief of Field Services reviews the qualifications of the vendors providing services to IDVR consumers in order to assure the quality of these services, as well as the safety of consumers. Vendors are certified through either the Commission on Accreditation of Rehabilitation Facilities (CARF) or Rehabilitation Services Accreditation System (RSAS).

IDVR policy assures that applicants and eligible individuals exercise choice of service providers. Each region throughout the state provides a comprehensive list of CRP services and expertise available, which enables the consumer to make an informed choice in the selection of an appropriate vendor.

4.8(b)(4) EVIDENCE OF COLLABORATION REGARDING SUPPORTED EMPLOYMENT SERVICES AND EXTENDED SERVICES

IDVR is committed to the advancement of opportunities for Idaho citizens with disabilities including those with the most significant disabilities to be employed and to become independent in the least restrictive and most integrated environments. IDVR has established and continues to maintain strong working relationships with pertinent state agencies and other appropriate entities to assist in the provision of supported employment services throughout the state.

As of July 1, 2004, the Idaho Legislature changed the responsibility for the distribution of state only funding for Work Services/Supported Employment long-term support from the Department of Health and Welfare to IDVR. The intent of this change was to enhance the effectiveness of the program accountability. IDVR convened a committee that developed a management strategy for the program as well as accountability measures to ensure that funding would be appropriately utilized and more individuals with the most significant disabilities would receive the support they need to be successful. IDVR hired two individuals to manage this program statewide under the direction of the IDVR Administrator.

IDVR continues to be successful in maximizing the Federal Supported Employment allocation by collaborating with other agencies and organizations to ensure that available resources are identified and utilized in order to maximize the impact of the services for all individuals with the

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most significant disabilities requiring long-term community supported employment. Included within this collaboration are Medicaid services provided under the Home and Community Based Services Waiver, as well as services provided through the statewide IDVR consortia with the State Regional Mental Health programs.

Additionally, the Agency is striving to decrease the number of individuals on the waiting list for funding for long-term community supported employment services. A stronger focus on community-based integrated employment rather than sheltered employment has been part of an on-going discussion with community partners and other interested parties in order to develop a workable strategy.

IDVR counselors work closely with the two staff involved with the State Work Services/Supported Employment program to ensure that eligible individuals are referred and placed on the waiting list to receive long-term community supported employment funding when appropriate. IDVR counselors also assist individuals who desire to move from a sheltered work environment into competitive and community-based supported employment when appropriate.

Attachment 4.11

EVALUATION AND REPORT OF PROGRESS IN ACHIEVING IDENTIFIED GOALS AND PRIORTIES AND USE OF TITLE 1 FUNDS FOR THE INNOVATION AND EXPANSION ACTIVITIES OF THE STATE IN CARRYING OUT THE VOCATIONAL REHABILITATION AND SUPPORTED EMPLOYMENT PROGRAMS

Attachment 4.11(a): COMPREHENSIVE STATEWIDE ASSESSMENT

In response to the requirements of Section 101.15 (a) of the Rehabilitation Act as amended, the Idaho Division of Vocational Rehabilitation (IDVR), in partnership with the State Rehabilitation Council (SRC), draws from many sources to assess thoroughly the needs of Idahoans with disabilities. The Statewide Comprehensive Needs Assessment will continue to be conducted on a triennial basis and will include case reviews, consumer satisfaction surveys, focus groups of people with disabilities, Town Meetings conducted annually in major metropolitan areas of the state, as well as information gathered from community rehabilitation programs statewide. Additionally, counselors assigned to specialized populations (transition, corrections, mental health, migrant and seasonal farm workers, American Indians, as well as Hispanics) elicit input not only from the client population but from others who provide services to these populations including input from various state boards and groups focused on the needs of people with disabilities.

Other facets of IDVR's Needs Assessment include:

1. A Strategic Planning process involving a rolling three-year plan which is updated annually. The strategic plan has become an important tool in the decision making process that affects the day-to-day operations of IDVR. Input is solicited from IDVR staff, the CAP, the SRC, and the SILC. Primary focus areas include:
 - Service delivery with an emphasis on continued improvement in the quality of service delivery
 - Staff Development
 - Utilization of Information Technology
 - Strengthened partnerships with shareholders
 - Enhanced revenue opportunities for all VR programs
2. Comprehensive Statewide Needs Assessment Survey:
The survey was designed to evaluate the degree to which IDVR is addressing the rehabilitation needs of the demographic populations encompassed within this state. Groups targeted for their input and statewide representation included:
 - Client Assistance Program (CAP)
 - A variety of specific disability advocacy organizations, e.g. Parents Unlimited, NAMI
 - Statewide transition partners
 - Consumers
 - State Mental Health Council and mental health providers
 - State Independent Living Council

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- State Rehabilitation Council
- Developmental Disability Council
- Task Force on the ADA
- Adult Corrections
- Juvenile Corrections
- WIA partners
- Local Chambers of Commerce
- Idaho Migrant Council
- American Indian Tribal representatives and 121 projects
- Idaho Inclusiveness coalition
- IDVR staff
- Community Rehabilitations Programs

A total of 165 responses were recorded. In addition, responses were recorded from the wide spectrum of sources that were tapped throughout the state including focus groups of people with disabilities, town meetings, responses procured from community rehabilitation programs, counselors assigned to specialized populations, as well as various state boards and groups focused on the needs of people with disabilities. Five major themes were identified that are capable of being addressed within the purview of IDVR.

Those themes were:

1. **Service Delivery** - While a majority of the respondents expressed satisfaction with IDVR services provided across the state, there were still some demographic pockets of concern where the provision of services could be enhanced. Areas targeted for improvement included a need for stronger up front vocational guidance and counseling, effective and thorough support for job searching, and more thorough discussion regarding SSA work incentives in order to alleviate the fear of losing SSA benefits.
2. **Transitioning Students** - The responses received reflected issues beyond the scope of VR services alone, including the lack of effective family support, inefficient school sponsored work experiences, a disconnect within the smaller communities regarding the inherent value of youth who are attempting to transition into the world of work, as well as a stronger network and coordination among agencies designed to provide the essential support required to ensure the acquisition of meaningful employment that will result in self-sufficiency.
3. **Staff Development**- A number of areas outlining rehabilitation needs suggest that additional training for the counseling staff should be implemented. The areas identified include SSA work incentives, a need to be more proactive in regards to a self-employment strategy for appropriate clients, and a better understanding of mental health and substance abuse issues.
4. **SSA Work Incentives** - There were a myriad of responses outlining the need to provide comprehensive information regarding SSA work incentives in order to allay the fear of losing benefits and take advantage of any work incentives.
5. **Supported Employment Services** - The following comments were recorded in regard to this topic: A stronger focus on community based, integrated employment rather than sheltered

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employment (work services), increased long-term funding for supported employment, and a reduction of the waiting list for funding of supported services.

Individuals with the most significant disabilities, including Supported Employment

IDVR is not operating under an order of selection and is able to serve all eligible Idahoans. At the end of FFY2006, 97 % of all cases open during the year were coded as either significantly disabled (SD) or most significantly disabled (MSD). No one was closed in extended employment in a non-integrated setting.

The Comprehensive Needs Assessment reinforced the need for additional State only funds designated for long-term support. There is a strong consensus among shareholders regarding the need to work closely with IDVR to craft a solution to the long-term support funding shortfall.

Additionally, a stronger focus on community based employment outcomes rather than sheltered workshop (extended employment) has been identified as a need for this population. It should be noted that all clients served in supported employment meet the classification of either SD or MSD. IDVR monitors the proper coding of SD and MSD through its on-going case review process.

Through representation on the SILC, IDVR provides significant input into the development of the State Plan for Independent Living (SPIL). The SILC conducted a series of focus Groups across the state to gather input on the needs of individuals with disabilities, particularly those with the most significant disabilities. IDVR incorporated the results of these focus groups into its Comprehensive Needs Assessment.

Service Needs of Individuals with Disabilities who are Minorities

IDVR addresses services to minority consumers through the hiring of a culturally diverse staff, by providing cultural diversity training to IDVR staff, by hiring bi-lingual vocational counselors to ingress the Hispanic population, and by collaborating with the two Section 121 Tribal Vocational Rehabilitation (TVR) grantees.

The most recent census data indicates that Idaho's two largest minority groups include: Hispanics at 9.1% of the state's population and American Indians at 1.4% of the state's population. In FFY 2006, Hispanics comprised 8.6 % of IDVR clients served. American Indians comprised 2.6 % of IDVR clients served. Historically, particular areas of the state with higher Hispanic populations have been underserved because of the unique barriers related to the culture, which make it difficult to attract participation from that population.

It is important to note that efforts were undertaken to solicit responses from the Hispanic population in regard to the Comprehensive Needs Assessment. In reality, because of the cultural disconnect between this population and government programs, the rate of response was marginal. However, this disadvantage was partially mitigated by the bi-lingual counselors serving this population who were able to elicit some meaningful responses.

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Individuals with Disabilities who have been Unserved or Underserved

Historically, transitional students in Idaho have experienced significant barriers when exiting the school system and entering the world of work. The following barriers have been identified:

- More vocational training at the high school level needed (lack of work skills)
- Knowledge of procedural details related to scholarships, applications (employment or school), resumes, etc.
- Access to community resources difficult
- Family support/attitudes
- Limited job opportunities in small communities
- Fear of losing SSA benefits
- Lack of work ethics and experience
- Substance abuse issues
- Transportation

IDVR has identified the transitional population as a major focus area in its current State Plan. The barriers noted above will continue to be addressed by IDVR and partners as outlined in Goal #2 of the State Plan.

Individuals with Disabilities Served through Other Components of the Statewide Workforce Investment System

IDVR is an active participant in the Statewide Workforce Investment System. Each region of the state has established a regular schedule of participation within each One Stop Center. In one particular region the VR counselor is permanently housed within the One Stop Center.

IDVR continues to provide training and information to One Stop Center partners on disability related issues, thus increasing the willingness and ability of all partners to serve individuals with disabilities.

The comprehensive needs assessment identified two areas of concern with regard to individuals with disabilities and the One Stop Centers. 1) A lack of familiarity with the needs of individuals with disabilities 2) difficulty navigating through the one stop system.

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Assessment of the Need to Establish, Develop, or Improve Community Rehabilitation Programs (CRP) within the State

IDVR maintains a CRP specialist who serves as a liaison with CRPs and is vested with the responsibility for insuring that services are delivered consistent with IDVR standards.

There are thirty four Community Rehabilitation Programs in Idaho. Twelve of them belong to a traditional association called the Idaho Association of Community Rehabilitation Programs (IACRP) and twenty two belong to Vocational Providers of Idaho (VPI).

The majority of the IACRP members are accredited by Commission on Accreditation of Rehabilitation Facilities (CARF). The remainder of the CRPs is accredited by Rehabilitation Services Accreditation System (RSAS).

IDVR monitors all CRPs to ensure that they are properly accredited before they are accepted as viable vendors. This monitoring is ongoing to ensure that the accreditation remains active.

Idaho is a predominantly rural state. In several of the rural areas there is very limited choice with regard to CRP vendors available. Currently, IDVR has established a round table discussion with interested stakeholders to address this particular need and strategies that would resolve the current deficit of service providers. It is anticipated that a negotiated solution will be reached during FFY 2008.

**Attachment 4.11(b): ANNUAL ESTIMATE OF INDIVIDUALS TO BE
SERVED AND COST OF SERVICES**

The estimated number of all individuals who are eligible for services under this State Plan:
54,000

1. The estimated number of eligible individuals in FFY 2009 who will receive services on an IPE provided by:
 - a. Title I, Part B: 3285
 - b. Title VI, Part B: 200
 - c. IDVR is not in an order of selection.
2. The estimated cost of services:
 - a. Title I, Part B: \$9,010,885
 - b. Title VI, Part B: \$300,000

Attachment 4.11(c)(1): STATE'S GOALS AND PRIORITIES

The goals and priorities for the Idaho Division of Vocational Rehabilitation (IDVR) are reviewed annually and revised as necessary based on input from a variety of sources including the State Rehabilitation Council (SRC), Agency staff, State Independent Living Council (SILC), Client Advocacy Program (CAP), Tribal VR representatives, the Statewide Comprehensive Needs Assessment, the Field Services Employee Council and the IDVR Management team.

The goals and priorities are developed using information from the Comprehensive Needs Assessment, findings and recommendations from monitoring activities conducted under Section 107, first hand observation and experiences of the rehabilitation managers and field services employee council, input from organizations mentioned in the previous paragraph, and the expectations defined by federal standards and indicators. These goals and priorities were jointly developed and agreed to by IDVR and the State Rehabilitation Council.

The goals and priorities identified for inclusion in this State Plan will be:

- Measurable
- Attainable
- Meaningful based upon the unique needs and circumstances of Idaho, keeping in mind the rural nature of this state and the limited resources available
- Consistent with IDVR's mission and principles
- Disseminated to staff and evaluated annually
- Consistent with federal standards and indicators

Goal #1- Service Delivery: IDVR will provide the services required to ensure that individuals with significant disabilities secure employment and achieve economic self-sufficiency.

Objectives:

- 1.1 Comprehensive vocational guidance and counseling will be consistently provided during the development of the IPE. Case audits at closure and regional reviews will be used to monitor compliance with this goal. A minimum of 300 cases will be monitored for compliance during FFY 2008.
- 1.2 IDVR will collaborate with the WIPA grant awardees housed under the auspices of the Idaho CAP program in order to identify individuals receiving SSA who could potentially benefit from the provision of PASS plans, identification of work incentives and assistance in negotiating the SSA system. This objective will be measured by the number of participants referred to the WIPA grant program. Since this is a new grant program, the total number of participants referred at the completion of FFY 2008 will be used as a baseline from which to measure future increase or decrease of referrals.
- 1.3 IDVR counselors will encourage and support PASS plan development for individuals receiving SSA whenever appropriate, with a goal of 5 PASS plans written for FFY 2008.

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Goal # 2- Transitioning Students: IDVR will partner with the Idaho Department of Education, Special Education, to create regional working groups that include the VR counselor, special education teachers and other pertinent participants to further the cooperation and collaboration of agencies providing services to transition age youths.

Objectives:

- 2.1 IDVR Field Services Chief, along with representatives from Special Education and other community agencies, will establish the framework for regional working groups throughout Idaho. These working groups will standardize the delivery of services within each region and encourage the sharing of resources. By the end of FFY2008, at least one region of the state will be identified as having agency and community participants committed and available to begin the formation of a functional working group. A minimum of one regional group will be established and functioning by the end of FFY 2009.
- 2.2 Based upon the implementation of the working group prototype IDVR will exceed the documented School Work Transition rehabilitations in FFY2008 compared to year end FFY 2007 by 1%.

Goal #3-Staff Development: IDVR will continue to develop and employ qualified staff as defined by the guidelines of the Comprehensive System of Personnel Development (CSPD).

Objectives:

- 3.1 Identify and support counselors employed by IDVR in their efforts to meet the CSPD requirements within the 5-year timeframe in order to maximize the number of counselors with masters level credentials.
- 3.2 Provide staff pertinent training opportunities that enhance their rehabilitation knowledge and professional development.
- 3.3 Training will be provided to staff, based on the results of a regularly scheduled internal regional casework review process, to ensure that competencies are maintained.

Goal #4 Supported Employment (SE): IDVR will provide high quality Supported Employment (SE) services statewide to a greater number of eligible individuals.

Objectives:

- 4.1 IDVR will work with interested state and community partners to craft a strategy to increase the percentage of individuals in long-term community supported employment versus sheltered employment (work services). This goal will be measured by an increase of 1% in community employment placements.

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- 4.2 IDVR will document the need for state funding for long-term support services. This documentation will be used to support the request of an enhancement in state funding in the FFY 2009.

**Attachment 4.11(c)(4): GOALS AND PLANS FOR DISTRIBUTION OF
TITLE VI, PART B FUNDS**

IDVR uses all funds received annually under Section 622 of the Act for the provision of Supported Employment (SE) services for eligible individuals with the most significant disabilities who require supported employment to become employed and who have selected SE as the appropriate employment strategy following a comprehensive assessment of rehabilitation career job needs. All of these funds are allotted as direct client service funds to all IDVR Regional Offices. Individuals receiving services under this funding are experiencing multiple issues that may include extended learning requirements, inappropriate job behavior, difficulties in interaction with the supervisor, coping with changes on the job such as job tasks, coworkers, supervisors as well as transportation issues.

Supported Employment services include situational assessment, job placement and job coaching, placement and follow-along, as well as transportation and other supportive services when justified.

The priorities for the strategy for FFY 2009-2010 include the following:

1. A continued emphasis on community based integrated employment rather than sheltered employment (work services)
2. Pursuit of increased long-term state funding for supported employment
3. Continued efforts towards a reduction of the waiting list for funding of long-term supported employment services
4. Investigation into the viability of using Social Security work incentives such as Impairment Related work Expenses (IRWE) as a means of client/self funded long term support.

Attachment 4.11(d): STRATEGIES

The following strategies have been identified to support the needs identified in the FFY 2007 Comprehensive Statewide Needs Assessment as described in Attachment 4.11(c)(1) and the agency goals and priorities. These strategies will be implemented in order to achieve Agency goals and priorities, support innovation and expansion activities, and overcome any barriers to accessing the vocational rehabilitation and supported employment programs.

These strategies are subject to change due to the nature of the strategies and the continuous evolution of concerns related to disability issues in the state. The Agency continuously monitors these strategies based on current circumstances, striving to stay in tune with the needs of Idahoans with disabilities.

Attachment 4.11(d)(1)(A): EXPANSION AND IMPROVEMENT OF SERVICES TO INDIVIDUALS WITH DISABILITIES AND ASSISTIVE TECHNOLOGY SERVICES AND DEVICES

Strategy 1: Assistive Technology Services and Devices

In January 2007, IDVR revised the Agency Field Services Policy Manual for the express purpose of standardizing service delivery statewide. The manual states:

“Rehabilitation technology services (assistive/adaptive technology) may be provided as compensatory strategies to increase, maintain, or improve functional capabilities of individuals with disabilities. Rehabilitation technology services may be provided at any time in the rehabilitation process, including the assessment for determining eligibility and vocational rehabilitation needs, extended evaluation, services provided under an IPE, and post employment services. Rehabilitation technology, including telecommunications, sensory, and other technological aids and devices are exempt from a determination of the availability of comparable services and benefits. If, however, comparable services or benefits exist under any other program and are available to the individual, IDVR must use those resources to meet in whole or part, the costs of the vocational rehabilitation services. (For further information, please review the series of comprehensive fact sheets provided by Idaho Assistive Technology Project located on the IDVR internet web site. There are also direct links to the Idaho Assistive Technology Project web site at that location)”.

In 2007, the Idaho Assistive Technology Project received a demonstration grant for the purpose of recycling and reutilization of durable medical equipment such as wheel chairs and scooters. IDVR has agreed to provide assistance in picking up equipment and transporting it to the various recycling centers that will be established throughout the state. VR staff can be utilized when the task of acquiring this equipment is compatible with the counselor’s travel plans on particular days.

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IDVR will continue to focus upon efficient usage of rehabilitation technology enhancements as they become available on the market. This equipment will be utilized to overcome barriers that would otherwise impede the achievement of a desired vocational outcome.

Strategy 2: Expansion and Improvement of Services to Individuals with Disabilities

- IDVR will create a new review instrument to be used for internal casework audits that will identify current practices that do not meet Agency or federal standards as well as identify examples of “best case practice”. The Agency recognized a need to create a better evaluation tool as a direct outcome of the last Federal 107 review, which identified specific casework requirements that were not adequately addressed or documented.
- IDVR has developed a series of Critical Caseload Templates that each counselor is utilizing as a desk aid. These templates, along with ongoing Regional training, will ensure that staff is familiarized with a broad range of services and devices. The success of this strategy will be measured by client satisfaction surveys conducted at the closure of cases after the provision of an IPE, including outcomes that involved the acquisition of assistive technology.
- Collaborate with other state agencies and organizations to address disability related issues as they arise.
- IDVR staff will participate on regional or statewide transportation committees that are developed to expand or create options for public transportation and to represent the interests of Idahoans with disabilities.
- Actively support IDVR clients in their participation in Mental Health Court in communities where this program has been implemented.
- Invite community rehabilitation partners to attend relevant trainings sponsored by IDVR, including the annual in-service training when appropriate.
- Extend invitations to the Tribal VR representative to attend quarterly IDVR management meeting and staff trainings.

Attachment 4.11(d)(1)(B): OUTREACH TO SERVE THE MOST SIGNIFICANTLY DISABLED WHO ARE MINORITIES OR UNSERVED OR UNDERSERVED

Strategy 1:

The triennial needs assessment recently conducted specifically identified as underserved, individuals requiring long-term supportive employment services. A major emphasis is being undertaken as evidenced by the agency’s stipulated intent identified in goal #4 (see section 4.11(c) (1)) to recruit other organizations and state agencies with similar objectives to advocate for help in securing additional resources. These resources will be used to increase the percent of individuals participating in community based, integrated, supported employment.

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Strategy 2:

Because of the homogeneity of Idaho's population base, there are very few minorities. Overall, the population of Idaho is being served equitably across the state. The primary minority and underserved population is the Hispanic population, many of whom enter the state on a seasonal basis to work in agriculture. IDVR will continue to outreach and serve the Migrant population with a five year grant designed to increase community awareness of this population and identify community resources available as comparable benefits. In order to actively encourage participation by potential clients, IDVR will also address family issues which could potentially conflict with the individual's capacity to participate in an IPE or pursue and maintain successful employment. This grant is currently in its fourth year and will continue to be measured by performance objectives established for the final two years on an incremental basis. This particular demographic population experiences a large number of individuals with the most significant disabilities based upon the labor intensive nature of the work and other occupational hazards related to seasonal and migratory farm work as well as cultural and education barriers.

Strategy 3:

Another underserved population is the American Indians. In Idaho, there are currently two Section 121 Vocational Rehabilitation projects with another (Bannock/Shoshone) in the process of reapplication. General IDVR counselors meet minimally on a monthly basis with the two projects mentioned above. In addition, a general IDVR counselor maintains monthly contact with the Bannock/Shoshone tribal population. IDVR general counselors will open tribal cases periodically when requested by an individual or a project representative.

Attachment 4.11(d)(1)(C): DEVELOPMENT AND IMPROVEMENT OF THE STATE COMMUNITY REHABILITATION PROGRAMS (CRPs)

Strategy 1

It has been identified in the Triennial Needs Assessment that there are particular rural areas of the state in which adequate Community Rehabilitation Program coverage is not available. In order to rectify this deficit, the agency has initiated a round table discussion with interested stakeholders to address this particular need and strategies intended to resolve the current deficit of service providers in some rural areas of the state.

Strategy 2:

In Idaho, the CRP programs function as independent vendors structured on a fee for service basis. In order to assure the highest quality service outcome to Agency clientele, each vendor must be certified by one of two National Certification entities. The first is the Commission on Accreditation of Rehabilitation Facilities (CARF). The second is the Rehabilitation Services Accreditation System (RSAS).

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Strategy 3:

A pilot project was developed in 2005 to provide an installment payment incentive for participating CRPs rather than the traditional method of fee-for-service. The intent is to increase efficiency in service delivery and encourage a positive employment outcome for the client. The payments for services are based upon certain milestones being achieved in the job search process, with the greatest financial reward to the CRP coming at the time of successful closure. The cost to the agency remains neutral when compared to fee-for-service but the emphasis has been shifted for the CRPs to a successful employment outcome rather than merely the provision of vocational services. To date, the program is still in pilot status with the prospect of expansion into the Northern region. It is anticipated that this service delivery payment option will be expanded statewide within the next three years as more CRPs are able to financially accommodate the initial start up of an incremental payment schedule. Currently, there are two CRPs participating with several more expressing an interest. Overall, the outcomes have met expectations by expediting the outcomes in a more efficient manner than the traditional hourly fee for service.

Attachment 4.11(d)(1)(D): IMPROVEMENT OF THE STATE'S FEDERAL EVALUATION STANDARDS AND PERFORMANCE INDICATORS

Strategy:

In FFY2006, IDVR met or exceeded all the federal Standards and Indicators. The Agency continues to closely monitor monthly performance levels to ensure that the outcomes for FFY2007 and FFY2008-2010 will reflect that same level of performance.

Additionally, IDVR regularly educates management and staff regarding their responsibilities towards meeting these goals. Progress is monitored regularly by the Field Services Chief.

Attachment 4.11(d)(1)(E): STRATEGIES FOR ASSISTING OTHER COMPONENTS OF THE STATEWIDE WORKFORCE INVESTMENT SYSTEM IN ASSISTING INDIVIDUALS WITH DISABILITIES

Strategy 1:

In 2005, Governor Kempthorne consolidated six former Workforce Investment areas into two. The Workforce Development Council is now the sole Workforce Investment Board in the state to oversee a statewide regional planning area. This requires the Council to exercise special responsibility for development and oversight of the state's workforce development infrastructure and program.

IDVR is actively involved as a Workforce Development partner in Idaho. A representative from IDVR regularly attends meetings with other Workforce Development partners to help set the agenda for the Quarterly Workforce Development Council

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meetings to ensure relevant topics are included for discussion or vote, to share important information regarding agency/community resources for mutual clientele, and provide information to the Board on selected issues. The partners promote system integration to the maximum extent feasible through the cross training of staff and participation in a continuous improvement process designed to increase outcomes and customer satisfaction. IDVR will strive to maintain this high level of cooperation and participation.

Strategy 2:

Currently, IDVR staff has a close working relationship in each of the One-Stop Centers across the state. A survey was conducted in 2006 to determine the current level of participation and interaction IDVR staff has in each of the One-Stop Centers. While each region's participation is customized to the needs and culture of the particular region, it was evident that a close working partnership exists with the One-Stops and WIA partners. At least one IDVR staff member is assigned at each of the local One-Stop Centers. The staff member has a regular schedule of attendance at the One-Stop or is on call with a five-minute response time due to the close proximity of the offices. The partners share resources where possible in accordance with each agency's guidelines when working with common clientele. IDVR will continue to maintain a close working relationship with the One-Stop Centers and partner agencies.

The comprehensive assessment identified concerns with some One Stop staff who do not demonstrate adequate understanding of disability issues and needs. In an effort to rectify this deficit, IDVR has chosen to invite key members of the One Stop program to attend a VR sponsored management meeting. The purpose of this invitation is to provide guidance and disability awareness to those keys DOL staff who are responsible for assisting individuals with disabilities to access the One Stop System. Opportunities for additional training in a more informal manner will be planned as well.

Attachment 4.11(d)(2)(A), (B) and (C): EXTENT TO WHICH THESE STRATEGIES WILL BE USED TO ADDRESS THE GOALS IDENTIFIED IN THE NEEDS ASSESSMENT, SUPPORT THE INNOVATION AND EXPANSION ACTIVITIES AND OVERCOME IDENTIFIED BARRIERS

Finding qualified applicants for vacant counselor positions presents a challenge in the state. The Agency is actively working to recruit qualified master's level applicants; however, this has proven to be a difficult task. Attachment 4.10 addresses this staffing issue. Quality staff will enhance service delivery and outcomes for Agency clients, add credibility to the mentoring/role, model activities provided to client and ensure that staff is knowledgeable regarding counseling theories and general career guidance expertise. By focusing upon a high standard of professional competency, this emphasis will enhance the Agency's ability to meet or exceed the Federal Evaluation Standards and Performance Indicators.

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Adequate funding to meet the demand is always an issue with the Agency and will continue to be of concern as costs for services increase. The use of comparable benefits will help to supplant Agency funds that can then be used elsewhere. The Statewide Needs Assessment indicated an overall theme regarding the need for additional funds for support services for individuals. The collaboration with other agencies and continued focus on WIA partners and SSA work incentives will assist in the on-going search for comparable benefits.

Transitioning youth are of concern both on a state and national level. A recent news release from Washington D.C. explains the continued need to address high school age youth and to reduce drop out rates. According to John Podesta, President and CEO of the Center for American Progress, "America is facing a drop out crisis". Two out of three students leave high school unprepared for college or the modern workplace. Minority and low income students are particularly at risk. This includes individuals with disabilities. By partnering with other agencies through the Inter-Agency Secondary Transition Working Group and other interested organizations, the resources and expertise provided to this population are greatly increased. This will address the drop out rate and enable students to become better prepared for employment.

The most recent 107 Monitoring Review indicated a deficit in the provision of standardized services statewide. A number of corrective action measures have been taken to ameliorate this concern. These strategies will support goals # 1 and # 3 promulgated in Attachment 4.11(c)(1) as well as support innovation and expansion activities.

- Field Services Policy Manual. A comprehensive Field Services Policy Manual has been completed and is available on the Agency internet web site. This manual has defined the spectrum of services and the intent behind those services. This document has dramatically increased the standardization of service delivery.
- Critical Case Management Templates. The counselor now has access to a desk reference that specifically outlines the various Federal/State protocols that must be addressed at the various junctures of case progress from Application through Post-Employment services.
- Internal agency quality assurance review document. The Agency has revised the internal audit to ensure that more focus is placed upon the consistency and validity of service delivery. The new review instrument is used to identify examples of "best case practice" and areas that do not meet Agency and federal standards as well the new client surveys will be used as a training tool for continuous improvement.

In order to overcome identified barriers relating to equitable access to and participation of individuals with disabilities, IDVR has established a collaborative relationship with the Idaho Assistive Technology Project, which assures that the latest rehabilitation

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technology is available to clientele throughout the state. In addition, by supporting the Reutilization Demonstration Grant, individuals with the most significant disabilities will have better access to durable medical equipment that will enable them to actively participate in independent living, supported employment and other vocational activities.

Attachment 4.11(e)(2): EVALUATION AND REPORTS OF PROGRESS FOR FFY 2007

The Idaho Division of Vocational Rehabilitation maintains an effective working relationship with the State Rehabilitation Council (SRC) to ensure that the rehabilitation needs of individuals with disabilities are effectively communicated. The Division meets with the SRC on a quarterly basis where Division staff share the State goals and priorities and input is solicited from the Council. The Division regularly consults with the Council regarding the development, implementation and revision of State policies and procedures pertaining to the provision of Vocational Rehabilitation services. The SRC conducts annual client satisfaction surveys in two regions of the state. IDVR integrates that information, along with the survey information collected by IDVR from the remaining regions of the state, into the development and implementation of training that is conducted throughout the state. The survey results, along with the training that is adapted from those results, is designed to have a positive impact on the Federal Standards and Indicators that govern the outcome of the VR program.

The SRC and the Division built a specific communication plan designed to better manage the relationship between the two organizations. One component of the plan is for the Division's Administrator and the SRC Chairman to communicate by phone at a minimum of once every two weeks to discuss on-going items of concern. This has worked relatively well in maintaining communication. Every new policy developed by the Division is submitted to the SRC for discussion. Discussions typically occur prior to the final draft of the policy. On occasion, the SRC will vote on a policy change by the Division after discussion is concluded. If timeliness is a concern, the SRC receives information on important items by e-mail. Some of the SRC business is also conducted through the use of e-mail.

SRC members, especially the Chairman, are invited to IDVR's quarterly management meetings. In these meetings, the opportunity is afforded for interaction with Division Management Staff. The SRC is invited and encouraged to attend and participate in national and regional meetings as well. For example, SRC members have attended the last several regional and national CSAVR meetings.

ACTIONS TAKEN IN SUPPORT OF IDVR GOALS AND PRIORITIES IDENTIFIED IN THE FFY 2005/06/07 STATE PLAN:

Goal 1: To More Effectively Accommodate Increased Caseloads/Referrals.

Performance Strategies/Measures:

- 1.1 **FFY 2005/06/07 Objective (Priority):** The Division will restructure its management configuration. The structure design will increase efficiency in

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processing and serving the increased client population across the state.

FFY 2006/07 Achieved: The restructure configuration for senior management was finalized during FFY2007. In addition, a new region dedicated exclusively to individuals under the jurisdiction of the state correctional system and a region exclusively dedicated to school transition and mental health populations contributed to a significant increase in rehabilitation outcomes as well as the statewide rehabilitation rate. These outcomes are verified in the following statistics:

FFY2006: rehabilitations = 1996 rehabilitation rate = 62.5%

FFY2007: rehabilitations = 2120 rehabilitation rate = 65.5%

- 1.2 **FFY 2005/06/07 Objective (Priority):** The new Correction Region will institute meetings that will provide education about the VR process that will build closer professional relationships between IDVR and Correction's staff in the Boise Metropolitan vicinity.

FFY 2006/07 Achieved: Quarterly meetings with the Idaho Department of Corrections (adult) are on-going throughout the year. By maintaining this contact, the regional manager is able to ensure a close working relationship with the department. This relationship is currently reflected in an innovative training program in which the agency and the department collaborate to ensure a select number of clients are competitively trained as welders prior to release. This program was created as a result of a statewide needs assessment completed by the Department of Labor that demonstrated a shortage of trained welders in Idaho. This training program is currently in its second session of trainees with an anticipated successful placement of all participants. The average wage for welders in Idaho ranges from \$11.20 to \$18.17 per hour. This wage level positively impacts Federal Performance Indicator 1.3.

On an annual basis twelve monthly meetings are conducted with the Department of Juvenile Corrections. These meetings ensure that the probation officers and vocational counselors maintain a close, collaborative relationship.

The regional rehabilitation numbers increased 6% between FFY 2006 and FFY 2007.

Goal 2: To Decrease the Number of Individuals with Disabilities who are Closed Unsuccessfully.

Performance Strategies/Measures:

- 2.1 **FFY 2005/06/07 Objective (Priority):** Continued monitoring of the change in time limit for moving from eligibility status to plan status.

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FFY2006/07 Achieved: The trend continues to move in the intended direction. For FFY 2007, there were 436 fewer unsuccessful closures than FFY 2006.

Goal 3: Marketing/ Employer Development.

Performance Strategies/Measures:

- 3.1 FFY 2005/06/07 Objective (Priority):** The Division created a full-time job developer position for the Boise metropolitan vicinity. Additionally, the Division created a pilot project in the Lewiston Region in which a Vocational Rehabilitation Assistant assumed part-time duties as a job developer. Both of these positions were created to enhance employment outcomes.

FFY 2007 Achieved: During FFY 2007, the statistics for the part -time job developer included: 42 employers contacted, 13 placements initiated, 200 hours utilized for placement.

During the third quarter of FFY 2007, the full –time job developer terminated her position. To date, that position has not been filled. Prior to termination of the position, 17 rehabilitations were achieved, 154 employer contacts were initiated, and 36 employer placements were achieved.

Both of these job development assignments supported the significant increase in the agency’s overall rehabilitation outcomes and positively impacted Federal Performance Indicators 1.1 and 1.2.

Goal 4: Funding:

Performance Strategies/Measures:

- 4.1 FFY 2005/06/07 Objective (Priority):** The Division will apply for the Work Incentives Planning and Assistance grant (WIPA).

FFY2006/07 Achieved:

1. Although the Division was not awarded the grant, our partner, the State Planning and Advocacy Agency (CO-AD), did secure the grant. Since both programs serve a mutual population, it is the intent of IDVR and CO-AD to collaborate during FFY2008 to ensure maximum benefit to clients. In 2007, the WIPA staff provided training to IDVR staff statewide using the agency’s teleconference technology. The training served to introduce the WIPA grant to IDVR staff and instruct staff in the protocol of referrals to the grant.
2. IDVR staff has been prepared to commence referrals effective October 2007.

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It is anticipated that this partnering, beginning in FFY2008, will result in a positive impact on Federal Standards and Indicators 1.1 and 1.4.

Goal 5: To Maintain the Level of Supported Employment Services Required to Meet the Needs of Individuals with the Most Significant Disabilities:

Performance Strategies/Measures:

- 5.1 FFY 2005/06/07 Objective (Priority):** IDVR will continue to allocate all Title VI Part B funding as direct client service funds. The Extended Employment Services Program (EES) is the primary provider of long-term support. The program also assists in coordinating DD waiver funding through Medicaid. (See Attachment 4.8(b)(4)).

FFY 2007: Achieved: The two full time staff assigned to the EES program continue to focus on issues of timely tracking of utilization of funds, and monitoring of the number of clients served by the program. They are successfully coordinating funding with the DD waiver through Medicaid. Discussions regarding the timely movement of individuals off the waiting list, as well as the development of strategies to increase the numbers of individuals receiving community services vs. extended employment services have included numerous community partners. While no resolution is in sight regarding the necessary increase in funding, the agency continues its efforts to secure additional funding through state and other sources.

Attachment 4.11(e)(2)(D): STATUS OF EVALUATION STANDARDS AND PERFORMANCE INDICATORS for FFY 2007

Current status (FFY 2007) of IDVR's Standards and Performance Indicators:

Evaluation Standard 1: Employment Outcomes

Performance Indicator 1.1:

The Number of Individuals Achieving Employment Outcomes During the Current Performance Period Compared to the Number from the Previous Performance Period.

FFY 2007: 2120 Rehabilitations - Indicator Passed

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Performance Indicator 1.2:

The Percentage of Individuals Receiving Services Under an Individualized Plan for Employment Who Achieve Employment Outcomes.

FFY 2007: 65.5%- Indicator Passed

Performance Indicator 1.3:

Competitive Employment Outcomes as a Percentage of all Employment Outcomes.

FFY 2007: 98.4%-Indicator Passed

Performance Indicator 1.4:

Competitive Employment Outcomes for Individuals with Significant Disabilities as a Percentage of all Individuals with Competitive Employment Outcomes.

FFY 2007: 99.1% -Indicator Passed

Performance Indicator 1.5:

The Ratio of the Average VR Hourly Wage to the Average State Hourly Wage.

FFY2007: .64 -Indicator Passed

Performance Indicator 1.6:

The Percentage of Individuals Achieving Competitive Employment Outcomes Who Report Their Own Income as the Primary Source of Support at Application Compared to at Closure.

FFY2007: 68.8% - Indicator Passed

Evaluation Standard 2: Equal Access to Services

Performance Indicator 2.1:

Access to Services for Minorities as Measured by the Ratio of the Minority Service Rate to the Non-Minority Service Rate.

FFY 2007: .864 -Indicator Passed

Since IDVR has met or exceeded all Federal Indicators, the intent is to sustain that level of performance in FFY2008.

**Attachment 4.11(e)(2)(E): UTILIZATION OF THE FUNDS RESERVED FOR
INNOVATION AND EXPANSION ACTIVITIES IN FFY 2007**

IDVR provides funding support for the State Rehabilitation Council expenditures including travel, lodging, advertising for town meetings, supplies, meeting room rentals,

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interpreters when necessary, facilitation services, and costs related to consumer satisfaction/outreach surveys,

Cost: \$20,069.18

Funding support for the State Independent Living Council (SILC) is also allocated out of Innovation and Expansion funding. IDVR has allocated 71% of independent living funding provided through Title I to the SILC. The remaining 29% is distributed directly to the Disability Action Center. (a center for independent living). The SILC is responsible for disseminating funding to the other Centers for Independent Living statewide.

Cost:

SILC: \$ 130,791.00

DAC: \$ 53,445.00

Attachment 6.3

QUALITY, SCOPE AND EXTENT OF SUPPORTED EMPLOYMENT SERVICES

The Idaho Division of Vocational Rehabilitation (IDVR) provides the full scope of Community Supported Employment Services (CSE) to those Vocational Rehabilitation (VR) eligible individuals with the most significant disabilities, who require extended services to maintain employment, and have at least a reasonable expectation that a source of extended services (long-term support) will be available at the time of transition. CSE includes, if necessary, situational assessments through Trial Work Experiences (TWE), or other diagnostic strategies, to assess the individual's interests and abilities.

Once an appropriate Community Supported Employment position is identified for an individual, IDVR provides supported employment job coaching services for a period of up to 18 months. The services can be extended beyond 18 months, when appropriate, upon agreement of the consumer and the counselor.

Community Supported Employment Services provided to individuals are coordinated through an Individualized Plan for Employment (IPE) that includes a description of the services needed, the identification of the state, federal, or private programs that will provide the continuing support; and the basis for concluding that continuing support is available.

Community Supported Employment Services include the following:

1. If necessary, a supplemental evaluation to the evaluation of the rehabilitation potential provided under 34 CFR, Part 361.
2. Job developmental and placement into competitive, community integrated employment.
3. Traditional time-limited services needed to support the training in employment.
4. Any other service that would be identified as requisite to the targeted supported employment outcome.

Each individual's IPE describes the timing of the transition into extended services, which is to be provided by the long-term support provider following the termination of time-limited services by IDVR.

All Community Supported Employment Services are provided by qualified Community Rehabilitation Programs (CRPs) who have demonstrated the capacity to provide the service and are accredited by either the Commission on Accreditation of Rehabilitation Facilities (CARF) or Rehabilitation Services Accreditation Systems (RSAS) accredited. Community Supported Employment Services are purchased through Title VI-B and Title 110 funds.

Current Idaho Division of Vocational Rehabilitation (IDVR) policy and the Federal regulations require a third party commitment in writing, to designate the long-term support provider. Since 07/01/2004, the Extended Employment Services (EES) Program under the IDVR is the main

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provider of long-term support, although those individuals who qualify for the DD waiver can use Medicaid funds. A CSE participant may only be transitioned to long-term support based on an assessment of rehabilitation goal achievement and job stability. Periodic monitoring occurs to ensure that each individual receiving Community Supported Employment Services is making satisfactory progress.

During FFY 2007, the Idaho State Legislature approved the rules governing the IDVR Extended Employment Services (EES) program.

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CERTIFICATION REGARDING LOBBYING

Applicants must review the requirements for certification regarding lobbying included in the regulations cited below before completing this form. Applicants must sign this form to comply with the certification requirements under 34 CFR Part 82, "New Restrictions on Lobbying." This certification is a material representation of fact upon which the Department of Education relies when it makes a grant or enters into a cooperative agreement.

As required by Section 1352, Title 31 of the U.S. Code, and implemented at 34 CFR Part 82, for persons entering into a Federal contract, grant or cooperative agreement over \$100,000, as defined at 34 CFR Part 82, Sections 82.105 and 82.110, the applicant certifies that:

- (a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the making of any Federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement;
- (b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;
- (c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants and contracts under grants and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

As the duly authorized representative of the applicant, I hereby certify that the applicant will comply with the above certification.

NAME OF APPLICANT NAME Idaho Division of Vocational Rehabilitation	PR/AWARD NUMBER AND / OR PROJECT Title I Basic Support
PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE Michael Graham, Administrator	
SIGNATURE	DATE:

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(b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;

(c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants and contracts under grants and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

As the duly authorized representative of the applicant, I hereby certify that the applicant will comply with the above certification.

NAME OF APPLICANT NAME Idaho Division of Vocational Rehabilitation	PR/AWARD NUMBER AND / OR PROJECT Title VI Supported Employment
PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE Michael Graham, Administrator	
SIGNATURE	DATE:

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Idaho State Board of Education

GOVERNING POLICIES AND PROCEDURES

SECTION: IV. ORGANIZATION SPECIFIC POLICIES AND PROCEDURES

Subsection: F. Division of Vocational Rehabilitation

April 2002

F. Division of Vocational Rehabilitation

1. Purpose

The Idaho Division of Vocational Rehabilitation is charged with the responsibility of assisting physically and mentally disabled citizens to become employed in realistic and permanent work. Assistance eligibility is based on:

- a. The presence of a physical or mental disability that for the individual constitutes or results in a substantial handicap to employment.
- b. A reasonable expectation that vocational rehabilitation services and assistance may benefit the individual in terms of employability.

2. Delegation of Authority

The Board delegates to the administrator of the Division of Vocational Rehabilitation the responsibility to manage and supervise the division in accordance with the applicable provisions of the Governing Policies and Procedures of the Board. The chief executive officer is also responsible for the preparation and submission of an agenda for matters related to the Idaho Division of Vocational Rehabilitation for Board review and action.

3. Responsibilities of the Division

The Division of Vocational Rehabilitation is charged with two (2) major responsibilities: Management of the State/Federal Vocational Rehabilitation Program and management of the State Renal Disease Program.

a. Vocational Rehabilitation

The division serves individuals with chronic mental or physical disabilities if the disability(ies) present a substantial handicap to employment and if there is a realistic expectation that the division can provide a service that will assist the individual in becoming employed. Funding for this program is provided through state appropriations, federal and other sources. While age does not play a direct role in eligibility determination, there must be a reasonable expectation that the individual can gain and maintain employment. Employment is the primary goal of this program, and the following services are provided on an as-needed basis:

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- (1) Evaluation of rehabilitation potential, including diagnostic and related services incidental to the determination of eligibility for, and the nature and scope of services to be provided.
- (2) Guidance and counseling, including personal adjustment counseling, to maintain a relationship throughout a handicapped individual's program of services; and referral necessary to aid handicapped individuals in securing needed services from other state/federal agencies when such services are not available from the division.
- (3) Physical and mental restoration services.
- (4) Vocational and other training services, including personal and vocational adjustment, books, tools, and other training materials.
- (5) Maintenance.
- (6) Transportation.
- (7) Services to members of a handicapped individual's immediate family when such services are necessary to the adjustment and rehabilitation of the handicapped individual.
- (8) Interpreter services for the deaf.
- (9) Telecommunications, sensory and other technological aids and devices.
- (10) Recruitment and training services to provide new employment opportunities in the fields of rehabilitation, welfare, public safety, law enforcement, and other appropriate public service employment.
- (11) Placement in suitable employment, including post-employment services, necessary to assist handicapped individuals in maintaining suitable employment.
- (12) Occupational licenses, tools, equipment, initial stocks (including livestock), and other goods and services which can reasonably be expected to benefit a handicapped individual in terms of employability and the maintenance of employability.

b. Renal Disease

The division manages its appropriated funds to assist individuals with chronic renal failure. State-appropriated funds are used to help cover the catastrophic costs of this serious, life-threatening disease. The division coordinates the medical management of this program, and coordinates its payments with the

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client's ability to pay, private insurance payments, and Medicare and Medicaid payments. Age is not a factor in determining eligibility for this program.

4. Internal Policies and Procedures

The chief executive officer may establish additional policies and procedures for the internal management of the Idaho Division of Vocational Rehabilitation which complement, but do not supplant, the Governing Policies and Procedures of the Board. Such internal policies and procedures are subject to Board review and action.

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Idaho Statutes

TITLE 33
EDUCATION
CHAPTER 22

VOCATIONAL EDUCATION -- FEDERAL AID

33-2211. POWERS OF STATE BOARD FOR PROFESSIONAL-TECHNICAL EDUCATION. The state board for professional-technical education shall have the power:

1. To adopt rules for its own government, the government of the Eastern Idaho Technical College and any professional-technical or vocational rehabilitation program, including programs under chapters 22 and 23, title 33,

Idaho Code;

2. To employ professional and nonprofessional persons and to prescribe their qualifications;

3. To acquire and hold, and to dispose of, real and personal property, and to construct, repair, remodel and remove buildings;

4. To contract for the acquisition, purchase or repair of buildings, in the manner prescribed for trustees of school districts;

5. To dispose of real and personal property in the manner prescribed for trustees of school districts;

6. To convey and transfer real property of the college upon which no buildings used for instruction are situated, to nonprofit corporations, school districts, community college housing commissions, counties or municipalities, with or without consideration; to rent real or personal property for the use of the college, its students or faculty, for such terms as may be determined by the state board for professional-technical education; and to lease real or personal property of the college not actually in use for instructional purposes on such terms as may be determined by the state board for professional-technical education;

7. To acquire, hold, and dispose of, water rights;

8. To accept grants or gifts of money, materials, or property of any kind

from any governmental agency, or from any person, firm, or association, on such terms as may be determined by the grantor;

9. To cooperate with any governmental agency, or any person, firm or association in the conduct of any educational program; to accept grants from any source for the conduct of such program, and to conduct such program on, or

off, campus;

10. To employ a president of the college and, with his advice, to appoint such assistants, instructors, specialists and other employees as are required for the operation of the college; to fix salaries and prescribe duties; and to

remove the president or other employees in accordance with the policies and rules of the state board of education;

11. With the advice of the president, to prescribe the courses and programs of study, the requirements for admission, the time and standards for completion of such courses and programs, and to grant certificates or associate of applied science degrees for those students entitled thereto;

12. To employ architects or engineers in planning the construction, remodeling or repair of any building or property and, whenever no other agency

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is designated by law so to do, to let contracts for such construction, remodeling or repair and to supervise the work thereof;

13. To have at all times, general supervision and control of all property, real and personal, appertaining to the college, and to insure the same.

TITLE 67
STATE GOVERNMENT AND STATE AFFAIRS
CHAPTER 52

IDAHO ADMINISTRATIVE PROCEDURE ACT

67-5229. INCORPORATION BY REFERENCE. (1) If the incorporation of its text

in the agency rules would be unduly cumbersome, expensive, or otherwise inexpedient an agency may incorporate by reference in its rules and without republication of the incorporated material in full, all or any part of:

(a) A code, standard or rule adopted by an agency of the United States;

(b) A code, standard or rule adopted by any nationally recognized organization or association;

(c) A code or standard adopted by Idaho statute or authorized by Idaho statute for adoption by rule; or

(d) A final rule of a state agency; provided however, that a state agency

shall not adopt a temporary rule incorporating by reference a rule of that

agency that is being or has been repealed unless the rule providing for the incorporation has been reviewed and approved by the legislature.

(2) The agency shall, as part of the rulemaking:

(a) Note where copies of the incorporated material may be obtained or electronically accessed; and

(b) If otherwise unavailable, provide one (1) copy of the incorporated material to the Idaho supreme court law library.

(3) The incorporated material shall be identified with specificity and shall include the date when the code, standard or rule was published, approved

or became effective. If the agency subsequently wishes to adopt amendments to previously incorporated material, it shall comply with the rulemaking procedures of this chapter.

(4) Unless prohibited by other provisions of law, the incorporated material is subject to legislative review in accordance with the provisions of

section 67-5291, Idaho Code, and shall have the same force and effect as a rule.

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SUBJECT

Transfer of GEAR UP Idaho Staff and Funding

REFERENCE

April 17, 2008

Discussion Postponed to June Regular meeting

BACKGROUND

GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) is a US Department of Education discretionary grant program. The Idaho State Board of Education applied for and received this grant in 2006. The grant program is designed to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. The federal program provides six-year grants to states and partnerships to provide services at high-poverty middle and high schools.

DISCUSSION

Idaho's program currently has an average commitment of \$1,200,000 per year from public and private institutions and their foundations for the remaining four years of the grant. Approximately \$1,300,000 in support from other sources still remains to be achieved in order for the grant to make full use of all available federal funds. Idaho's GEAR UP Grant is scheduled through 2012. The grant provides up to \$2,960,000 each year, based upon the availability of non-federal matching resources on a one-to-one basis and performance.

Early intervention services are provided to students beginning in the 7th grade in 22 selected Idaho schools. Services continue through the 12th grade. Those students who complete the program may be eligible for a substantial scholarship.

Recently the Governor and the Senate Education committee recommended that management of K-12 centered programs housed with the Board of Education be moved to the State Department of Education.

STAFF COMMENTS AND RECOMMENDATIONS

The implementation of this grant involves directly working with Idaho's K-12 schools and staff; while a large portion of the matching funds has been provided through Idaho's public institutions and their foundations.

BOARD ACTION

A motion to transfer the Gear Up program to the State Department of Education and to direct the Executive Director of the Board to work with Department of Education staff and the US Department of Education officials to take all steps necessary to effect the transfer as soon after the fiscal year as possible.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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SUBJECT

Approval of Institution, Agency, and Special/Health Programs Strategic Plans

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.M.1.
Section 67-1901 through 67-1903, Idaho Code

BACKGROUND

The State of Idaho requires the Board and institutions and agencies of the board submit a strategic plan each year in July. These draft strategic plans have been developed by institutions' and agencies' staff.

The Office of the State Board of Education (OSBE), in compliance with Board policy I.M.1., distributed guidelines for the submittal of strategic plans to each institution, agency, and special/health program. Guidelines were developed based on the approved State Board of Education (SBOE) Strategic Plan pursuant to the Division of Financial Management (DFM) guidelines.

DISCUSSION

Strategic plans must be submitted to DFM annually in July. Many institutions and agencies have comprehensive, lengthy strategic plans. The plans submitted for the purposes of this requirement are condensed to meet OSBE and DFM guidelines. Full plans are available to the Board upon request.

Most of the institutions and agencies worked diligently to meet the requirements this year. Training will be developed and implemented in the Fall of 2008 to better prepare the institutions and agencies in meeting the required guidelines in the future.

The guidelines set by OSBE followed DFM requirements. OSBE requested that strategic plans include the following (and should follow the general format of the Board's approved 2008 Strategic Plan):

- * ***Vision and/or Mission Statement:*** Provide a comprehensive outcome-based statement covering major division and core functions of the agency.
- * ***Goals for major divisions:*** A goal is a planning element that describes the broad condition or outcome that an agency or program is trying to achieve.
- * ***Objective:*** The objective is a planning element that describes how the agency plans to achieve a goal.
- * ***Performance Measures:*** Performance measures assess the progress the agency is making in achieving a goal (quantifiable indicator).
- * ***Benchmarks:*** Benchmarks are performance targets for each performance measure for at a minimum the next fiscal year (and an explanation of how the benchmark level was established which can mean an industry standard or agency research of circumstances that impact performance capabilities).
- * ***External Factors:*** Identify external factors that are beyond the control of the agency that affect the achievement of goals.

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IMPACT

Once approved, OSBE will submit the strategic plans to DFM. If the Board does not approve the strategic plans as submitted, the Board may direct staff to work with the agencies, institutions, and special/health programs to revise their strategic plans.

ATTACHMENTS

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Attachment 2 –	OSBE WICHE Professional Student Exchange	Page 7
Attachment 3 –	OSBE University of Utah Medical Education Program	Page 9
Attachment 4 –	OSBE Family Medicine Residency of Idaho	Page 11
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STAFF COMMENTS AND RECOMMENDATIONS

Board staff has reviewed the strategic plans submitted by the institutions, agencies, and special/health programs. While there is some deviation in the plans, staff recommends approval of the strategic plans as submitted this year. Staff recommends that the Board inform institutions and agencies that plans submitted in the future that do not meet the format guidelines requested by OSBE, as directed in Board Policy, will not be approved.

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BOARD ACTION

A motion to approve the 2009-2013 Institution, Agency, and Special/Health Program Strategic Plans as submitted.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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Office of the State Board of Education
Scholarships and Grants
2009-2013 Strategic Plan

Mission Statement

The State Board of Education provides administrative oversight for a variety of programs designed to assist Idaho students who are pursuing postsecondary education. These programs include a range of scholarships, grants, and work-study opportunities, and reflect the Board of Education and the Legislature's belief that substantial economic and social benefits accrue to the state if deserving students have the option and, were possible, financial assistance in gaining a good education. Listed below are programs currently administered for the Board by the Office for the Board:

Program	Type	Funding Source
Robert R Lee Promise A	Scholarship	State
Robert R Lee Promise B	Scholarship	State
Atwell Parry	Work Study Program	State
Minority "At Risk"	Scholarship	State
Teachers/Nurses	Loan Forgiveness	State
Freedom	POW/MIA Scholarship (Fee Waiver)	State
Public Safety Officer	Scholarship (Fee Waiver)	State
Grow Your Own Teacher	Scholarship	State
Leveraging Educational Assistance	Scholarship	State/Federal
Byrd Honors	Scholarship	Federal

Goal I

Increase access to postsecondary education and improve the continuation rate for Idaho high school graduates by helping students pay for educational costs.

Objective 1

Administer all assigned programs in a manner that ensures maximum effective use of state and federal resources.

Performance Measure

Percentage of all secondary completers continuing to postsecondary education.

Percentage of eligible applicants served by each program.

Benchmark

Fifty percent of all secondary completers continue to postsecondary education within 3 years of high school graduation.

One hundred percent of eligible applicants receive timely processing of their applications.

Objective 2

Establish a new need/merit based scholarship program designed to encourage and assist well qualified students from low income families to attend postsecondary education.

Performance Measure

Enabling legislative proposal processed through DFM to the Legislature

Benchmark

Program reviewed and supported by executive/legislative leadership

Objective 3

Increase the number and percentage of Idaho minority and English as second language (ESL) students who pursue postsecondary education.

Performance Measure

Percentage of minority student secondary completers that continue to postsecondary education.

Benchmark

Thirty five percent of minority student secondary completers continue to postsecondary education.

Objective 4

Increase the number of scholarship available to Idaho's best and brightest students to attend an Idaho educational institution.

Performance Measure

Number and percentage of highly qualified applicants (3.5+ GPA and 28+ ACT equivalent score) receiving Promise A scholarships

Benchmark

Fifty percent of highly qualified applicants are selected for Promise A scholarships.

Key External Factors Beyond Agency Control

- Scholarship, grant and work study are funded by state and federal appropriations. Continuation, expansion or creation of new programs depends on the continued support from the Governor and legislators.
- The funding available for some programs is not adequate to cover all applicants who meet minimum qualifications and therefore some well qualified applicants may not be selected for program support.
- The lack of a statewide longitudinal data system with unique student identifiers may limit the data collection efforts necessary to compile the performance measures.

Office of the State Board of Education
WICHE Professional Student Exchange (Field of Optometry)
Strategic Plan
2009-2013

Mission Statement

The Western Commission for Higher Education (WICHE) and its 15 member states work to improve access to higher education and ensure student success. Student exchange programs, regional initiatives, and research and policy work allow WICHE to assist students, policymakers, educators, and institutional, business and community leaders throughout the West and beyond. Idaho's participation in the Professional Student Exchange Program (PSEP) through WICHE enables students to enroll in an out-of-state professional optometry program at a reduced cost. The program supports students through four (4) years of training

Goal I

Attract quality students to the WICHE PSEP program that also have an interest in practicing in Idaho.

Performance Measure

Number of students applying each year.

Number of students selected.

Benchmark

Attract two well qualified applicants for each position filled.

Goal II

Produce two (2) highly-trained and fully-qualified optometrist each year.

Objective

Train excellent optometrists to practice in Idaho.

Performance measure

Pass rate on the National Board of Examiners Optometry Examination.

Number of graduates remaining in Idaho.

Benchmark

100 percent pass rate on Board of Examiners Optometry Examination.

50 percent of graduates remain in Idaho.

Key External Factors Beyond Agency Control

While applicant screening will include interest in practicing in Idaho, the program has no control on factors which will ultimately dictate the location and opportunities pursued by program graduates.

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Office of the State Board of Education
University of Utah Medical Education Program
Strategic Plan
2009-2013

Mission Statement

The University of Utah Medical Education Program provides eight (8) Idaho students each year with the opportunity for state support to receive four (4) years of medical training through the University of Utah School of Medicine. This partnership allows Idaho students to receive medical training not currently available in the state of Idaho, and, since many of the graduates return to Idaho to practice medicine, helps meet Idaho's need for more practicing physicians to care for its citizens.

Goal I

Provide high quality medical education to state funded Idaho students each year in the four year program (32 students total in training at any one time) leading to an M.D. degree.

Objective 1

Recruit eight high quality Idaho students each year that have an interest in returning to Idaho after completing their medical education.

Performance Measure

Number of Idaho funded students applying/number and percentage selected.
Average GPA and MCAT Score of admitted Idaho students.
Pass rate of Idaho students on U.S. medical licensing examination.

Benchmark

Number of applicants will be sufficient to ensure high quality selections.
Medical exam pass rate for Idaho students will be 100 percent.

Objective 2

Recruit and encourage new Idaho M.D. graduates to attend residency training in Idaho or return to Idaho after completion of residency.

Performance Measure

Number and percentage of all UU Medical Ed program graduates practicing in Idaho.

Benchmark

Seventy-five (75) percent of all UU Medical Ed program graduates will eventually return to Idaho to practice medicine.

Key External Factors Beyond Agency Control

- Funding and/or expansion of the UU Medical Ed Program depend on continued financial support from the state legislature.
- Currently, Program graduates have no requirement to return to Idaho to practice medicine. The number and percentage of graduates eventually practicing medicine in Idaho will depend on the availability of residency programs in the state, opportunities for employment or development of a practice.

Family Medicine Residency of Idaho

Strategic Goals

1. Education

Goal Statement: To provide an outstanding family medicine training program to prepare future family medicine physicians.

Objective 1: Create an exceptionally high quality medical education environment to train future family physicians.

Performance Measure 1: Track successful completion of American Board of Family Medicine (ABFM) Board certification examination scores for all program graduates.

Benchmark 1: At least 95% of all program graduates become ABFM Board certified.

Performance Measure 2: Track performance on American Board of Family Medicine (ABFM) Annual In-Service Training Examination.

Benchmark 2: FMRI program performance above the national average (>50%) on an annual basis.

Objective 2: FMRI will obtain full accreditation with Accreditation Council of Graduate Medical Education (ACGME) and its Residency Review Committee for Family Medicine (RRC-FM).

Performance Measure: FMRI will track its accreditation status and potential citations.

Benchmark: Maintain 100% full and unrestricted ACGME program accreditation and correct all citations.

2. Family Medicine Workforce

Goal Statement: To produce Idaho's future family medicine workforce by attracting, recruiting, and employing outstanding medical students to become family medicine residents and to keep as many of these residents in Idaho as possible post graduation from residency.

Objective 1: To recruit outstanding medical school students to FMRI for family medicine residency education.

Performance Measure: FMRI will track how many students match annually for residency training in family medicine at FMRI.

Benchmark: At least ten medical students matched per year at FMRI.

Objective 2: To graduate fully competent family physicians ready to practice independently the full scope of family medicine.

Performance Measure: FMRI will track the number of graduates per year from our residency program.

Benchmark: FMRI will graduate at least nine family physicians per year from the program.

Objective 3: To keep as many family physicians as possible in Idaho after residency graduation.

Performance Measure: FMRI will encourage all graduates to practice in Idaho and track how many remain.

Benchmark: 50% retention rate of graduates to practice in Idaho.

Objective 4: To produce as many family physicians as possible to practice in rural Idaho.

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Performance Measure: Of those graduates staying in Idaho, FMRI will track how many stay in rural or underserved Idaho.

Benchmark: 40% of graduates staying in Idaho will stay in rural or underserved Idaho.

Objective 5: To develop a second Rural Training Track (RTT) to enhance family medicine training in Idaho.

Performance Measure: Have the Residency Review Committee for Family Medicine (RRC-FM) give provisional accreditation to the new rural training program in the Magic Valley.

Benchmark: Complete and submit the Program Information Form (PIF) to the RRC-FM for accreditation.

3. Patient Care

Goal Statement: To provide outstanding comprehensive continuous, compassionate, timely, and accessible care to the patients' served at the Family Medicine Residency of Idaho.

Objective 1: To increase access to more new patients over the next year.

Performance Measure: FMRI will track new and unique patients being seen by FMRI.

Benchmark: 5% increase in new unique patients being seen by FMRI over last year's patient numbers.

Objective 2: To develop a patient centered medical home model and gain designation for this model.

Performance Measure: To prepare all needed work to become NCQA designated as a patient centered medical home.

Benchmark: To achieve NCQA designation as a patient centered medical home.

Objective 3: To develop a modified open access scheduling system.

Performance Measure: Monitor same day appointment availability.

Benchmark: 30% of our patient appointments or greater will be same day appointments.

Key External Factors (beyond control of the Family Medicine Residency of Idaho)

Funding:

The Family Medicine Residency of Idaho (FMRI) and its operations are contingent upon adequate funding. The major revenue drivers for FMRI are 50% from patient fees, 25% from the area hospitals, 8% from the State Board of Education, 2% from Upper Payment Limit (UPL), 10% from grants, and 5% from research. The biggest unknown is in regards to the Upper Payment Limit (UPL) payment to FMRI this year. Additionally, the Idaho State Legislature support for a request for expanded maintenance and expansion funding that would be approved by the State Board of Education and JFAC are critical to the program's success.

Legislative Support:

As noted above to the Idaho State Legislature's support of FMRI request for increased maintenance and expansion funding is critical to be able to meet the projected workforce training of family physicians that this state needs. We are in great hopes the State Board of Education and the Idaho State Legislature will back this request of FMRI as it has in the past.

Governor's Support:

Governor C.L. "Butch" Otter in his January 2007 State of the State asked FMRI to expand rural family medicine training for Idaho. We are in great hopes that the Governor will continue his

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strong support in his budget for FMRI and graduate medical education training in family medicine and for the workforce production of future family physicians for Idaho.

Hospital Support:

FMRI is contingent upon contributions from both Saint Alphonsus Regional Medical Center and St. Luke's Regional Medical Center in regards to Medicare DME/IME pass through money. This is money given through the hospitals to the Residency by the federal government in the form of Medicare dollars to help with our training. In addition, the hospitals both have additional contributions that are essential to FMRI's operations.

Medicaid/Medicare:

FMRI is also contingent on continued cost-based reimbursement through our Federally Qualified Health Center Look-Alike designation model that Medicaid and Medicare perform. This increased reimbursement funding is critical to the financial bottom line of the Residency. It appears that Medicaid and Medicare will continue its enhanced reimbursement for Community Health Centers and Federally Qualified Health Centers into the future. FMRI hopes that this is the case.

Residency Review Committee – Family Medicine (RRC-FM)

Accreditation of our new rural training track in the Magic Valley is contingent upon the RRC-FM's decision which will occur this year. We will give them every reason to accredit this new rural training track but obviously the decision is outside of our control and theirs to make.

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Office of the State Board of Education
Rural Physician Incentive Program
Strategic Plan 2009-2013

Mission Statement

To recruit and attract primary care physicians to underserved areas of rural Idaho.

Goal I

Develop the RPIP in preparation for future disbursements under the program.

Objective 1

Collect fees and retain interest from medical students supported by the state.

Performance Measure

Dollar value of fees collected and interest accrued.

Benchmark

100 percent of all required fees and accrued interest will be available for program disbursement or administrative cost specific to the program.

Objective 2

Organize a Board appointed RPIP oversight committee, establish appropriate Board policy guidance and begin ongoing administration of the program by July, 2009.

Performance Measure

Oversight committee begins meeting.
Board policy approved.

Benchmark

Oversight committee begins meeting by July, 2009.
Board policy is established and approved by Sept 2009.

Goal II

Recruit qualified physicians into the RPIP.

Objective 1

Identify qualified underserved rural areas in Idaho and determine availability of community matching funds.

Performance Measure

List of qualified Idaho rural communities in order of priority.

Benchmark

All qualified Idaho rural communities are identified and prioritized.

Objective 2

Establish financial targets.

Performance Measure

Dollar amounts will be set to maximize the number of quality physicians that can be recruited and retain in high priority rural communities.

Benchmark

Dollar physician debt reduction targets will be competitive with similar programs offered in neighboring states or other Idaho programs.

Objective 3

Effectively market the program to eligible physicians with an interest in living/practicing in rural Idaho.

Performance Measure

Number of qualified physician applicants for each position recruited/number of applicants selected.

Number/percentage of physicians remaining in practice in rural communities after fulfillment of their loan repayment obligations.

Benchmark

There will be more than one qualified applicant for each position funded.
Seventy five percent of physicians remain in their rural community.

Key External Factors Beyond Agency Control

- Funding for the RPIP is derived from fees assessed Idaho supported medical students at the University of Washington and the University of Utah. Future funding of the program depends of continued Legislature financial support to these medical students.
- The ability to recruit physicians into rural Idaho depends on the general supply and demand for physicians throughout the country and the availability of other competing incentive programs.
- Statute limits the dollar amount of disbursements to \$50K over five years. Over time these program constraints could reduce the competitiveness of the RPIP.
- The remoteness of some Idaho rural communities may make it difficult to attract qualified physicians to some of these communities, even with a debt payment program.

**Office of the State Board of Education
Advanced Clinician Psychiatry (Residency) Track
Strategic Plan
2009-2013**

Mission Statement

Idaho Advanced Clinicians Track is the psychiatry residency program offered through the University of Washington in cooperation with the Boise Veterans Affairs Medical Center, Saint Alphonsus Regional Medical Center and Saint Luke's Health System. The program supports three residents in each of four years of training. Two years of training is conducted in Seattle and two additional years are conducted in Boise.

Goal I

Attract quality students to the Psychiatry Residency Program that also have an interest in practicing in Idaho

Performance Measure

Number students applying each year
Number of students selected

Benchmark

Attract two well qualified applicants for each position filled

Goal II

Produce three highly trained and fully qualified Psychiatrists each year

Objective

Train excellent general psychiatrists to practice in smaller communities with a particular emphasis on teaching resident skills in outpatient and inpatient consultation-liaison psychiatry and working effectively with primary care providers.

Performance Measure

Pass rate on the Board of Medicine examination
Number of graduates remaining in Idaho

Benchmark

100 percent pass rate on Board of Medicine examination
50 percent of graduates remain in Idaho

Key External Factors Beyond Agency Control

While resident applicant screening will include interest in remaining and practicing in smaller Idaho communities, the program has no control on factors which will ultimately dictate the location and opportunities pursued by program graduates.

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Idaho Division of Professional- Technical Education

STRATEGIC PLAN SUMMARY

2009-2013

MISSION STATEMENT

The mission of the Professional-Technical Education System is to provide Idaho's youth and adults with the technical skills, knowledge, and attitudes necessary for successful performance in a highly effective workplace.

VISION STATEMENT

A qualified, skilled workforce is essential to the competitiveness of Idaho's businesses and industries, the effectiveness of the public sector, and the well-being and safety of Idaho's citizens. Economic vitality as well as quality of life is dependent on effective people equipped with the necessary skills, knowledge and attitudes necessary to compete effectively, work efficiently and safely while balancing responsibilities to the family and community.

Professional-Technical Education is Idaho's public workforce education and training delivery system and is devoted to preparing students for occupations requiring other than a four-year college degree as well as training workers already in the workplace.

Professional-Technical Education spans educational levels, contributing to a thorough education for youth by providing them with career knowledge, technical skills and attitudes necessary to succeed in the workplace. Programs for youth are provided through the secondary schools operating in concert with the technical college system to provide a continuum of education and training opportunities.

Professional-Technical Education also focuses on providing adults with the skills necessary to perform effectively in the workplace, including skills needed for entry, reentry or advancement. Programs for adults are delivered through the technical college system as well as special arrangements with the private sector. Workforce education and training is delivered in close collaboration and cooperation with other state entities involved in workforce development.

Quality, accessibility, responsiveness and commitment to continuous improvement are hallmarks of Idaho's Professional-Technical Education system.

Goals and Objectives Summary

Goal: Provide leadership and technical assistance that will continuously improve the quality of Idaho's professional-technical education system.

Objective: Maintain quality programs and options available through the technical college system.

Performance Measure: Increase the number of postsecondary enrollments.

Benchmark:

FTE: 4,132 - 2009, 4,215 - 2010, 4,299 – 2011,
4,383 - 2012, 4,467 - 2013

Headcount: 8,817 - 2009, 8,993 - 2010, 9,172 – 201,
9,351 – 2012, 9,530 - 2013

Goal: Provide all ages and abilities information and services to develop skills, knowledge, and social awareness to become globally competitive workers, responsible citizens, and life-long learners.

Objective: Support articulation between secondary and postsecondary professional-technical education.

Performance Measure: Increase the number of Tech Prep students.

Benchmark: 727 - 2009, 741 - 2010, 755 – 2011, 769 – 2012, 783 - 2013

Goal: Ensure information and research available meets the needs of workforce, business and industry, and government at all levels.

Objective: Improve the capacity of PTE courses to meet high school graduation requirements.

Performance Measure: Increase the number of high school students enrolled in professional-technical education courses that meet academic achievement standards.

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Benchmark: 5,802 - 2009, 5,918 - 2010, 6,036 - 2011,
6,154 - 2012, 6,272 - 2013

Objective: Maintain high placement rates.

Performance Measure: Number of postsecondary professional-technical education completers who achieve positive placement or transition at 90 percent of better.

Benchmark: 93% - 2009, 93% - 2010, 93% - 2011, 93% - 2012, 93% - 2013

KEY EXTERNAL FACTORS

- A rapid technological change in the workplace and the diversification of Idaho's growing job market.
- Capacity of the technical college system to accommodate individuals seeking postsecondary-technical education.
- Identifying and certifying an adequate supply of highly qualified professional-technical instructors.
- Lack of a statewide student data system.
- Increasing workload using existing staff.
- State and federal legislation that impacts the professional-technical education system.
- Revenues necessary to operate the professional-technical education system are intricately connected to the economy of the nation and state.
- Low employment rates shift postsecondary enrollments from credit programs to short-term training courses.



IDAHO COMMISSION FOR LIBRARIES

325 West State Street Boise, Idaho 83702 | ph. 208.334.2150 | 800.458.3271 | Fax: 208.334.4016

STRATEGIC PLAN

2009 – 2013

Vision:

Idaho libraries are the nexus of global information, innovative services and community, enabling us to sustain our history, empower our present and create our future.

Mission:

The Idaho Commission for Libraries assists libraries to build the capacity to better serve their clientele.

Values:

Library Ideals: We believe libraries exist for the public good. They are essential to literacy and informed citizens in a democratic society. We affirm intellectual freedom, life-long learning, customer privacy, and public access to information.

Customer Service: We deliver high quality customer service to internal and external customers.

Relationships: We achieve organizational effectiveness through mutual support, trust, value, and respect.

Collaboration: We accomplish goals using shared leadership, teamwork and consensus.

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Learning Organization: We continuously improve services by creating, gathering, and transferring information and modifying behaviors to reflect new knowledge and insights.

Goals and Objectives

Goal 1: Idaho libraries strategically position themselves to actively create and embrace the future. (SBOE goal: Quality)

Objective 1: Develop events to keep the Idaho library community engaged with the future.

- *Performance Measure:*
 - Number of events and participants
- *Benchmark:*
 - At the end of a CE event, 80% of respondents surveyed will indicate their skills and knowledge level is at 4 or 5 with 1 being low and 5 being high.
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

Objective 2: Generate and share innovative ideas.

- *Performance Measure:*
 - Facilitate a minimum of 4 SPLAT (Special Projects Library Action Team) meetings per year
- *Benchmark:*
 - 90% of SPLAT members surveyed will feel they have positively contributed to the development of statewide programs and services.
 - 75% of those surveyed will indicate learning about a new technology through a SPLAT activity.

Objective 3: Develop events to keep the Idaho library community engaged with the emerging trends in information access.

- *Performance Measure:*
 - Number of events and participants
- *Benchmark:*
 - Provide at least 6 events per year via alternative presentation methods.
 - Present at least 1 event per year dealing with current trends in delivering information and services.
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

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Objective 4: Develop, coordinate, provide and support programs and services to meet the needs of different populations.

- *Performance Measure:*
 - Number of events and participants
- *Benchmark:*
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

Goal 2: Idaho libraries develop and sustain services valued by digital natives. (SBOE goals: Quality, Access)

Objective 1: Create events targeted to the needs of digital natives.

- *Performance Measure:*
 - Number of events and participants
- *Benchmark:*
 - At the end of a CE event, 80% of respondents surveyed will indicate their skills and knowledge level is at 4 or 5 with 1 being low and 5 being high.
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

Objective 2: Advance the development and expansion of libraries' web presence.

- *Performance Measure:*
 - Number of public libraries with web sites
- *Benchmark:*
 - By 2012, 90% of the public libraries will have web sites that meet ICFL's basic standards.

Objective 3: Identify and promote information technologies.

- *Performance Measure:* under development

Goal 3: Idaho libraries flourish as a central place in a learning society, creating and promoting a vital identity. (SBOE goals Quality, Access)

Objective 1: Develop, coordinate, provide, and support reading and literacy programs and services.

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- *Performance Measure:*
 - Registrations at summer reading programs
- *Benchmark:*
 - 10% annual increase.
- *Performance Measure:*
 - Number of events and participants
- *Benchmark:*
 - At the end of a CE event, 80% of respondents surveyed will indicate their skills and knowledge level is at 4 or 5 with 1 being low and 5 being high.
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

Objective 2: Provide and support access to information.

- *Performance Measure:*
 - % increase in interlibrary loans through LiLI Unlimited (to/from)
- *Benchmark:*
 - 2% annual increase.
- *Performance Measure:*
 - % increase in LiLI Unlimited participating libraries
- *Benchmark:*
 - 5% annual increase.
- *Performance Measure:*
 - Value of the LiLI Databases licenses if purchased individually by all libraries compared to actual costs
 - Number of LiLI Databases sessions/logins
 - Number of LiLI Databases full text views
- *Benchmark:*
 - Value > Actual costs.
- *Performance Measure:*
 - Number of schools with certified teacher librarians
- *Benchmark:*
 - Increase in student test scores in schools with certified teacher librarians.

Objective 3: Provide professional development opportunities and training in multiple formats.

- *Performance Measure:*
 - Number of events and participants
- *Benchmark:*
 - At the end of a CE event, 80% of respondents surveyed will indicate their skills and knowledge level is at 4 or 5 with 1 being low and 5 being high.
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

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Objective 4: Survey and evaluate library programs and services.

- *Performance Measure:*
 - Attendance at public libraries
 - Percentage of Idaho citizens who identify libraries as important
- *Benchmark:*
 - 90% identify libraries as important.
- *Performance Measure:*
 - Number of libraries submitting annual statistics
- *Benchmark:*
 - 95% of public libraries will submit their data for inclusion in the annual statistical report.
 - After the pilot project, there will be a 10% annual increase in the number of school libraries submitting data for the annual statistical report.

Goal 4: Idaho libraries sustain an infrastructure that provides for services in an atmosphere of innovation and change. (SBOE goal: Efficiency)

Objective 1: Utilize members of the library community to develop statewide programs and services.

- *Performance Measure:*
 - Number of library community group meetings per year
- *Benchmark:*
 - Average 12 library community group meetings per year.
 - 90% of library community group members surveyed will feel they have positively contributed to the development of statewide programs and services.

Objective 2: Encourage libraries to develop and deliver innovative programs or services.

- *Performance Measure:* Under development

Objective 3: Maintain, revise, and develop opportunities for basic services.

- *Performance Measure:*
 - Number of events and participants
 - Number of e-courses completions
- *Benchmark:*
 - At the end of a CE event, 80% of respondents surveyed will indicate their skills and knowledge level is at 4 or 5 with 1 being low and 5 being high.
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

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Objective 4: Provide training for statewide programs and services.

- *Performance Measure:*
 - Number of training events and participants
- *Benchmark:*
 - At the end of a CE event, 80% of respondents surveyed will indicate their skills and knowledge level is at 4 or 5 with 1 being low and 5 being high.
 - 75% of attendees surveyed will indicate they have made changes in their library procedures or services as a result of participating in the event when measured 6 weeks to 6 months after the event.

Objective 5: Promote and encourage resource sharing.

- *Performance Measure:*
 - % increase in interlibrary loans through LiLI Unlimited (to/from)
- *Benchmark:*
 - 2% annual increase.

Objective 6: Promote and encourage access to information and library services.

- *Performance Measure:*
 - % increase in LiLI Unlimited participating libraries
- *Benchmark:*
 - 5% annual increase.
- *Performance Measure:*
 - Value of the LiLI Databases licenses if purchased individually by all libraries compared to actual costs
 - Number of LiLI Databases sessions/logins
 - Number of LiLI Databases full text views
- *Benchmark:*
 - Value > Actual costs.

Objective 7: Promote and support outreach projects that encourage partnerships.

- *Performance Measure:*
 - Number of libraries participating in outreach programs
 - Number of sub-grant projects that include outreach elements
- *Benchmark:*
 - 80% of respondents will feel their project partnerships have been successful.

Key External Factors

1. Tax revenues and local authority

The Commission for Libraries has a collaborative relationship with the Idaho library community. We have no regulatory authority over any library; each has its own revenue source(s) and its own governing authority:

- District libraries: 5-member elected board, funded through dedicated property taxes.
- City libraries: 5-member board appointed by mayor and city council, usually funded through the city general fund.
- School libraries: under school district governance structure and budget.
- Academic libraries: under college/university governance structure and budget.

We provide information, guidance, grant programs, incentives to cooperate, and opportunities to participate in statewide programs. Each library decides its level of participation and defines its approach to dealing with the following four (2-5 below) factors.

2. The future

Major changes have occurred over the last 20 years in all areas of information services. The initial technology explosion is in the past. Rapid change is now a constant and even more dramatic change is predicted. The profiles of our users and potential users have changed drastically. Preschoolers are computer literate and seniors love communicating via e-mail. These were predictions of the future not that long ago; now they are the facts of everyday life.

If librarians are to provide library services to these rapidly changing generations in the future, staff and governing bodies must learn to anticipate risks and opportunities, to understand current trends and their possible consequences, and to consider the variety of options we have for achieving our goals. We cannot wait for proof of what lies ahead or how things are going to develop.

3. Digital natives

Digital natives are those who have grown up with digital technology beginning in the last decades of the 20th century. Computers, video games and cams, the Internet as well as the wide variety of cell phones have been common, everyday toys and tools in their lives since infancy. Text messaging, wikis, blogs, and social networking sites are the communication avenues of a growing number of people. Librarians have no control over these technologies, but must embrace them (and keep an eye out for whatever comes next) in the design and delivery of services.

4. Vital identity

Stereotypes of libraries and librarians hamper our ability to deliver good library services. We have decades of misconceptions to overcome. Many Idaho libraries have changed dramatically in the past 10 years. We want libraries to be recognized as essential players in formal education, lifelong learning, and community and economic development. Increased communication and interaction among all types of libraries are needed to best meet our citizens' diverse needs. To most citizens a library is a library, but communities – including schools, colleges, and universities – are different and need different services. Without a vital identity, libraries may face disappearance in the future.

5. Innovation and change

Quality library services are the basis for a good reputation and the foundation for building the services of the future. Library staff and governing boards must deal with the demands of

the present so we can position ourselves for the future. To do this successfully, the underlying base of the library organization needs to be strong and healthy. The challenge is in making sure the continuity provides us something strong upon which to build the future. Librarians need to be innovative and embrace change.

6. Federal funding

20 to 25% of the Commission's total annual budget comes from the Library Services and Technology Act (LSTA), administered by the Institute of Museum and Library Services (IMLS). Based on the state's approved 5-year plan, Idaho's funding is used primarily for pilot projects and grants to libraries. Recent new interpretations from IMLS of eligible expenditures under LSTA, a re-authorization scheduled for 2009, and the federal deficit may each or collectively affect our ability to make progress toward the goals in Idaho's 5-year LSTA plan.



Idaho Public Television

STRATEGIC PLAN

2009-2013

Idaho Public Television STRATEGIC PLAN 2009-2013

Idaho Public Television is an integral part of the State Board of Education's overall plan and process for the delivery of quality education throughout Idaho. This Plan describes the primary vision, needs, concerns, goals, and objectives of the staff and administration toward achieving those goals. The mission and vision of our agency reflect an ongoing commitment to meeting the needs and reflect the interests of our varied audiences.

Idaho Public Television's services are in alignment with the guiding goals & objectives of the State Board of Education (SBOE). This plan displays SBOE goals & objectives alongside the Agency's Strategic Planning Issues.

5/20/08

Peter W. Morrill
General Manager
Idaho Public Television

VISION STATEMENT

Inspire, enrich, and educate the people we serve, enabling them to make a better world.

MISSION STATEMENT

The mission of Idaho Public Television is to meet the needs and reflect the interests of its varied audiences by:

- Establishing and maintaining statewide industry-standard delivery systems to provide television and other media to Idaho homes and schools;
- Providing quality educational, informational, and cultural television and related resources;
- Creating Idaho based educational, informational, and cultural programs and resources;
- Providing learning opportunities and fostering participation and collaboration in educational and civic activities; and

- Attracting, developing, and retaining talented and motivated employees who are committed to accomplishing the shared vision of Idaho Public Television.

Idaho Public Television STRATEGIC PLAN 2009-2013

SBOE Goal 1: **QUALITY:** Sustain and continuously improve the quality of Idaho's education, training, rehabilitation and information/research programs and services.

IdahoPTV Objectives for Quality:

- 1) Provide high quality television programming and new media content.
 - Performance Measure(s):
 - Number of awards for IdahoPTV media and services.
 - Benchmark: FY09 – meet or exceed 35
- 2) Progress toward quality DTV implementation.
 - Performance Measure(s):
 - Number of DTV channel hours of transmission.
 - Benchmark: FY09 – meet or exceed 137,240
 - Number of transmitters broadcasting a DTV signal.
 - Benchmark: FY09 – 5 of 5
 - Number of DTV-ready translators.
 - Benchmark: FY09 – 39 of 39
 - Number of cable companies carrying our prime digital channel.
 - Benchmark: FY09 – meet or exceed 10
 - Number of Direct Broadcast Satellite (DBS) providers carrying our prime digital channel.
 - Benchmark: FY09 – meet or exceed 7
 - Percentage of Idaho's population within our DTV signal coverage area.
 - Benchmark: FY09 – meet or exceed 73.1%
- 3) Provide relevant Idaho-specific information.
 - Performance Measure(s):
 - Number of IdahoPTV channel hours of Idaho-specific educational and informational programming.
 - Benchmark: FY09 – meet or exceed 1,900
 - Number of IdahoPTV productions produced during the year.
 - Benchmark: FY09 – meet or exceed 250
- 4) Be a relevant educational and informational resource to all citizens.
 - Performance Measure(s):
 - Children, less than 12 years old, viewing IdahoPTV.
 - Benchmark: FY09 – meet or exceed 110,000
 - Adults, of 50+ years, viewing IdahoPTV.
 - Benchmark: FY09 – meet or exceed 205,000

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
JUNE 19-20, 2008

- Total audience viewing IdahoPTV per week.
 - Benchmark: FY09 – meet or exceed 450,000
- 5) Provide access to IdahoPTV television content that accommodates the needs of the hearing and sight impaired.
 - Performance Measure(s):
 - Percentage of broadcast hours of closed captioned programming (non-live, i.e. videotaped) to aid visual learners and the hearing impaired.
 - Benchmark: FY09 – meet or exceed 97.5%
 - Number of service hours of descriptive video service provided via the second audio program to aid those with impaired vision.
 - Benchmark: FY09 – meet or exceed 13,500

SBOE Goal 2: ACCESS: Continuously improve access for individuals of all ages, abilities, and economic means to the public education system, training, rehabilitation, and information/research programs and services.

IdahoPTV Objectives for Access:

- 1) Provide access to IdahoPTV television content that accommodates the needs of the hearing and sight impaired.
 - Performance Measure(s):
 - Percentage of broadcast hours of closed captioned programming (non-live, i.e. videotaped) to aid visual learners and the hearing impaired.
 - Benchmark: FY09 – meet or exceed 97.5%
 - Number of service hours of descriptive video service provided via the second audio program to aid those with impaired vision.
 - Benchmark: FY09 – meet or exceed 13,500
- 2) Broadcast programs, and provide related resources, that specifically serve the needs of underserved audiences, which include children, ethnic minorities, and learners and teachers.
 - Performance Measure(s):
 - Children (as measured by channel hours of programming designed specifically for children).
 - Benchmark: FY09 – meet or exceed 13,100
 - Ethnic minorities (as measured by channel hours of programming that address diversity, citizenship issues, English as a second language, or include a Spanish-language audio channel).
 - Benchmark: FY09 – meet or exceed 5,000
 - Learners and teachers (as measured by channel hours of programming appropriate for use in K-20 classroom, telecourses, teacher professional development resources, adult basic education resources, and technological literacy).
 - Benchmark: FY09 – meet or exceed 5,000

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
JUNE 19-20, 2008

- 3) Provide access to new media content to citizens anywhere in the state to IdahoPTV and PBS resources, which support citizen participation and education.
 - Performance Measure(s)
 - Number of visitors to our Web sites.
 - Benchmark: FY09 – meet or exceed 2,100,000
- 4) Progress toward digital implementation, as a statewide infrastructure in cooperation with public and private entities.
 - Performance Measure(s):
 - Number of DTV channel hours of transmission.
 - Benchmark: FY09 – meet or exceed 137,240
 - Number of transmitters broadcasting a DTV signal.
 - Benchmark: FY09 – 5 of 5
 - Number of DTV-ready translators.
 - Benchmark: FY09 – 39 of 39
 - Number of cable companies carrying our prime digital channel.
 - Benchmark: FY09 – meet or exceed 10
 - Number of Direct Broadcast Satellite (DBS) providers carrying our prime digital channel.
 - Benchmark: FY09 – meet or exceed 7
 - Percentage of Idaho's population within our DTV signal coverage area.
 - Benchmark: FY09 – meet or exceed 73.1%
- 5) Contribute to a well-informed citizenry.
 - Performance Measure(s):
 - Number of channel hours of public affairs programming.
 - Benchmark: FY09 – meet or exceed 13,000

SBOE Goal 3: EFFICIENCY: Deliver educational, training, rehabilitation and information/research programs and services through the public education system in a manner which makes effective and efficient use of resources

IdahoPTV Objectives for Efficiency:

- 1) Operate an efficient statewide delivery/distribution & administration system:
 - Performance Measure(s):
 - Total personnel in content delivery/distribution & administration as compared to peers (statewide public broadcasters, CPB SABS data).
 - Benchmark: FY09 – less than 50.74
- 2) Foster and nurture collaborative partnerships.
 - Performance Measure(s):
 - Number of public in-state and out-of-state, private in-state and out-of-state partnerships displayed in matrix form.
 - Benchmark: FY09 – meet or exceed 50/10/100/20

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- 3) Seek supplemental funding opportunities for services and infrastructure.
 - Performance Measure(s):
 - Number of non-General Fund grant applications.
 - Benchmark: FY09 – meet or exceed 10

Key External Factors

(Beyond the control of Idaho Public Television):

Funding:

Most Idaho Public Television strategic goals and objectives assume at least current levels of on-going financial support from the State of Idaho, Corporation for Public Broadcasting and private contributions. These funding sources can be uncertain.

Much of the content that Idaho Public Television airs comes from other organizations, both nationally and regionally. If their program production funding sources change (up or down), it also could have an impact on IdahoPTV's ability to meet its goals and objectives targets.

Legislation/Rules:

Recent state statute and rule changes typically have not impacted Idaho Public Television.

Federal Government:

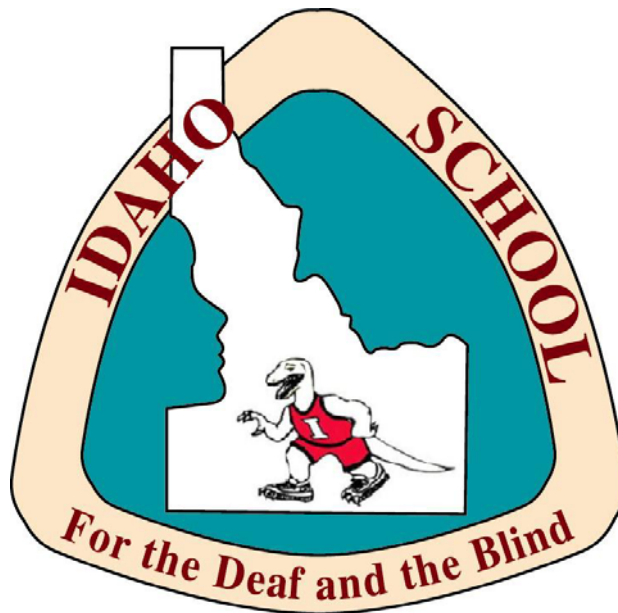
A great deal of funding, for both operational and infrastructure, comes from various entities of the federal government. A sudden downward change in these funding pools could affect IdahoPTV's ability to fulfill this strategic plan.

In addition, various aspects of IdahoPTV's program functions fall under federal oversight including the Federal Communications Commission, United States Department of Commerce, United States Department of Agriculture, Federal Aviation Administration, United States Department of Homeland Security, Internal Revenue Service, etc. Any change of federal rules and funding by any of these entities could also affect our ability to fulfill this strategic plan.

Finally, as a result of congressional action, the federal government, through the Federal Communications Commission, has ordered the cessation of operation of all analog television transmitters in the United States beginning on February 17, 2009. This landmark legislation will have significant impact on upwards of 608,000 viewers in the Idaho area (according to A.C. Nielson, Inc.) who rely on over-the-air analog television. This federally mandated shutdown of analog television may also reduced the size of audiences for television viewing both nationally and locally. An immediate impact on IdahoPTV may be a decline in donations because some viewers may not have purchased a digital TV receiving device.



STRATEGIC PLAN



2008-2011

ISDB STRATEGIC PLAN 2008-2011

The Idaho School for the Deaf and the Blind (ISDB) is an integral part of the State Board of Education's overall system of quality education throughout Idaho. This plan describes the agency's vision and mission and develops outcomes in the education of sensory-impaired children and youth. The ISDB also follows the Goals for Elementary and Secondary Schools as defined by the State Board and the Department of Education. Specific details of the agency's objectives and activities to support the plan and provide continuing services to Idaho's children, their families and their school districts are included in its Operational Plan, available under separate cover.

ISDB's Strategic Plan 2008-2011 outlines major Agency and State Board targets for ISDB services. It should be noted that the Board-sponsored Blind and Deaf Education Summit to be held July 30-August 1, 2008 may result in recommendations that impact this agency and its activities.

Mary L. Dunne, Superintendent

VISION STATEMENT

Education, communication and independence for life..

MISSION STATEMENT

- **The Idaho School for the Deaf and the Blind (ISDB) is a leading center of educational expertise in the state of Idaho available to all children with hearing and/or vision loss (including those with additional disabilities), their families, local education providers and statewide policy makers.**
- **ISDB's campus and outreach programs provide a continuum of educational opportunities, services and support designed to meet the individual needs of children with hearing and/or vision loss, including those with additional disabilities, from**

birth to age 21 and ensure that these children achieve their potential for independence and success.

ISDB GOALS & OBJECTIVES

QUALITY:

Goal 1: Sustain and continuously improve service delivery, programs, and student outcomes.

Objectives for quality:

1. Direct efforts at continuous improvement in programming that support student growth.
 - Performance Measure:
 - Student growth data from early childhood and state testing protocols.
 - Benchmarks:
 - Early childhood data places ISDB toddlers and children with vision or hearing loss within the range of age-appropriate developmental skills.
 - Student growth measures evidence 1 year growth or more for year of school.
2. Engage parents in activities that increase their knowledge and their child's achievement.
 - Performance Measures:
 - Annual parent survey.
 - Benchmark:
 - Parents representing different communication, literacy and placement choices will indicate 90% satisfaction with student learning opportunities and program goals.
3. Continue to update equipment and staff training to support innovative use of communication/computer technologies for student learning
 - Performance Measure:
 - Technology Log with inventory, staff trainings, student/staff use and annual assessment
 - Benchmark:
 - "Innovative" technology strategies increase by 10% each semester in each teaching team
4. Maintain, increase and scaffold independent living activities.
 - Performance Measure:
 - Independent Living Skills Log including campus activities, weekend workshops and participant survey results

- Benchmarks:
 - New, targeted independent living skills documented each quarter
 - Number of workshops, populations and locations increases annually
 - Workshop surveys show high satisfaction and usefulness (on a 5 point rating scale, 90% are 4 or better)
- 5. Direct agency efforts at continuous improvement in post-graduation outcomes.
 - Performance Measure:
 - Post-graduation data
 - Benchmark:
 - The numbers of ISDB graduates in each placement category will compare to national/state averages by 2013.
 - Percent of college/program completers
 - Percent of long-term employment rates
 - Percent of individuals with supported living needs placement

ACCESS:

Goal 2: Provide access for students and staff to skills, knowledge, and community services

Objectives for Access:

1. Increase student participation in opportunities for receiving non-traditional credits (dual credit, Tech-Prep, IDLA)
 - Performance Measure:
 - Number of students enrolled
 - Benchmark:
 - Students enrolled in advanced opportunities programs will increase annually
2. Increase student participation in 2-way video conferencing to explore and connect with the world
 - Performance Measure:
 - Number of students in innovative, out-of-classroom learning groups
 - Benchmark:
 - 5% increase in student connections with other students or resources documented each semester
3. Maintain assistive technologies needed for students to access their education, communities and a competitive workplace in the 21st Century.
 - Performance Measure:
 - Inventory/ checkout
 - Benchmark:
 - Each student has prescribed/appropriate assistive technologies available to him/her

4. Continue and increase efforts to coordinate training and mentoring for educational interpreters working in public schools to improve student access to instruction in LEAs.
 - Performance Measure:
 - EITC Training and mentoring log
 - Benchmark:
 - Educational Interpreters working in LEAs score 3.5 or better on the EIPA (Educational Interpreter Proficiency Assessment) by August 2009

EFFICIENCY

Goal 3: Deliver educational, training, habilitation and information programs and services in a manner which makes effective and efficient use of resources.

Objectives for efficiency:

1. ISDB Educational Interpreter Training Coordinator orchestrates statewide educational interpreter training and mentoring opportunities to increase consistency and equity statewide.
 - Performance Measure:
 - EITC Training and mentoring log
 - Benchmark:
 - Educational Interpreters working in LEAs score 3.5 or better on the EIPA (Educational Interpreter Proficiency Assessment) by August 2009
2. Provide additional audiological assessment, information and parent consultation statewide.
 - Performance Measure:
 - Mobile Audiology Log: travel, testing and consultation
 - Benchmark:
 - Increase outreach services by 10% annually to newly identified deaf/hard of hearing students
3. Provide additional Orientation and Mobility services statewide.
 - Performance Measure:
 - O & M Log
 - Benchmark:
 - Increase O & M services on campus to 4 days per week.
 - Develop list of public school needs regionally with Special Education Directors each spring
4. Continue and increase collaborative partnerships to increase service availability, improve networking, and minimize duplication
 - Performance Measure:
 - ISDB directory of partners, contact information, meeting schedules and joint activities
 - Benchmark:
 - Directory is reviewed annually for 2-1-1 alignment and shown to be 80% complete

5. Enhance connectivity of ISDB staff/students with families, professionals, other students, and resources using 2-way video conferencing to increase services and reduce costs.
 - Performance Measure:
 - 2-way Video Conference Log
 - Car mileage Reports
 - Benchmark:
 - Increase use of 2-way video conferencing by 5% each semester.

Key External Factors

Beyond control of the Idaho School for the Deaf and the Blind:

Funding:

Continued funding to support ISDB goals and objectives can be uncertain.

Public, Private, Parochial and Home Schools:

ISDB Outreach Consultants make recommendations to the lead agencies/primary educators of a child/student with sensory loss. Some of those primary educators value additional information and utilize the expertise from the ISDB specialist. When the primary educators choose not to utilize professional recommendation to affect change for children/students, there is no effective process of negotiation or appeal.

Referral of Students from LEAs:

Many LEAs in their efforts to provide a free and appropriate education in what they believe is a least restrictive environment are waiting too long to refer students for the level of services available at the campus center. Many students transfer to ISDB with minimal language and literacy competency, a history of failure, a sense of inadequacy and social isolation presenting difficult “odds” for success.

Misinformation:

Following the Office of Performance Evaluation review of ISDB programs, several committees were established to develop solutions to identified problems. During that time, a great deal of misinformation and misinterpretation of facts was perpetuated by a few individuals. Since ISDB was not represented some of the erroneous statements have prevailed. Full repair is out of our control and will only occur slowly through discovery.

Blind/Deaf Education Summitt:

Recommendations that result from the Idaho Blind/Deaf Education Summit July 30th-August 1st, will necessarily impact ISDB's vision and goals for service delivery.

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Idaho State Historical Society
Strategic Plan
2009-2013

Mission

Idaho State Historical Society preserves and promotes Idaho's cultural heritage

Vision

Our vision is to inspire, enrich and engage all Idahoans by leading the state in preserving and sharing our dynamic cultural heritage.

Values

- Customer Service
- Stewardship
- Education
- Professionalism

Goal 1

*Customer Service: **Provide access and high quality customer service to all Idahoans.***

Objectives(s):

- A) *Enhance our understanding of current and future customers through a survey conducted every three years.*

Performance measure: % of surveys returned

Benchmark: Collect at least 500 responses agency wide.

- B) Redesign program to create new compelling services inspired by our unique resources, target audience(s), optimized delivery method(s), and opportunity for earned income.

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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Performance measure: Number of new or enhanced programs developed to meet customer needs.

Benchmark: Create one new or enhanced program annually.

Benchmark: 10% of resources reallocated annually to new or enhanced program.

Goal 2

*Funding and Growth: **Optimize and enhance funding opportunities and partnerships.***

Objectives(s):

- A) Develop and implement a comprehensive funding plan that includes private philanthropy, grant programs, earned income, capital campaign, and membership revenues.

Performance measure: % implemented annually over 5 years.

Benchmark: One component completed each year.

- B) Create and implement a prioritized capital improvement plan.

Performance measure: # of projects implemented and completed annually.

Benchmark: Conduct annual analysis of projects to ensure timely completion.

Benchmark: Develop four Historic Structures Reports (HSR) to inform priorities.

- C) Create and implement an annual agency plan based on aligned budget priorities, work groups plans, and individual staff goals.

Performance measure: Annual update of plan.

Benchmark: Complete of 70% of work plan goals.

Goal 3

Marketing: Optimize public awareness and participation in agency services through enhanced brand identity, outreach, and marketing

- A) Create and implement a comprehensive marketing plan

Performance measure: % created and implemented annually over 5 years.

Benchmark: One major feature story per month.

- B) Enhance public awareness through media coverage.

Performance measure: Number and sources of coverage

Benchmark: Maintain or exceed current coverage from previous year. Increase use of ISHS services

- C) Increase use of ISHS services.

Performance measure: Number of services utilized by patrons.

Benchmark: Maintain or exceed current usage from previous year.

Goal 4

Training: *Build a uniform orientation and training program that optimizes skills necessary to achieve the Agency's strategic plan and vision.*

Objectives(s):

- A) Provide up-to-date and compelling orientation.

Performance measure: Number of orientations provided during the fiscal year

Benchmark: Each new employee oriented within 30 days.

- B) Create a training program that enhances organizational development and individual skills to maintain excellence in professional standards.

Performance measure: # of training opportunities per year.

Benchmark: Offer four all-staff training opportunities related to organizational development.

Benchmark: Offer appropriate number of training opportunities for team training based on annual agency plan and resources.

Benchmark: Offer appropriate number of training opportunities for individuals based on individual goals and work group resources.

Goal 5

*Organizational communication: **Improve internal agency communication to enhance agency-wide understanding and implementation of plans, policies, and procedures.***

Objectives(s):

- A)** *Create and implement a comprehensive internal communication plan that nurtures open communication and fosters a positive work environment.*

Performance measure: Staff participation in annual survey about internal communication and work environment.

Benchmark: Staff participation in annual survey exceeds 80%.

Benchmark: Maintain or improve internal communication.

- B)** *Conduct deliberate and substantive staff meetings.*

Performance measure: Participation of staff in scheduled meetings.

Benchmark: Staff participation meets or exceeds 90%.

- C)** *Develop and implement agency-wide calendar.*

Performance measure: Frequency of updates

Benchmark: Update calendar at least monthly.

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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D) Distribution of plans, policies, and procedures through agency policy manual and intranet website.

Performance measure: Number of updates.

Benchmark: Update agency policy manual annually.

Benchmark: Update intranet website quarterly.

Environmental Scan

Compiled in 2007

Economic Analysis

Idaho Continues Growing at Nation's Third Fastest Rate Page 1&2 Press Release Dept of Commerce & Labor

<http://cl.idaho.gov/news/PressReleases/tabid/294/ctl/PressRelease/mid/1047/ItemID/1837/Default.aspx>

Comprehensive Annual Financial Report, State of Idaho

Page 168-170 Adobe PDF (Report pages 154-156) Schedule 11, Schedule 12, and Schedule 13 Education Enrollment.

[http://www.sco.idaho.gov/web/DSADoc.nsf/5B1362785D34D4618725725F005FE17C/\\$FILE/2006-CAFR.pdf](http://www.sco.idaho.gov/web/DSADoc.nsf/5B1362785D34D4618725725F005FE17C/$FILE/2006-CAFR.pdf)

PAFR SCO, Page 8 ADOBE PDF (Report page 6) Economic/Demographic Outlook

[http://www.sco.idaho.gov/web/DSADoc.nsf/6D8C97CB9D06132C8725725F005FE25D/\\$FILE/2006-PAFR.pdf](http://www.sco.idaho.gov/web/DSADoc.nsf/6D8C97CB9D06132C8725725F005FE25D/$FILE/2006-PAFR.pdf)

State of Idaho Economic Forecast, DFM, January Executive Summary Page 1 only.

http://dfm.idaho.gov/Publications/EAB/Forecast/2007/January/ExecSum_Jan2007.pdf

Idaho's economy should end this decade on a higher note than when it started it.

Battered by the high-tech industry's implosion near the turn of the millennium, Idaho nonfarm employment grew an average of 1.8% per year from 1999 through 2004, which was well below the average for the previous five years. While Idaho real personal income did not retreat during this decade's first five years, it did slow considerably. The one noticeable exception came in 2004 when, aided by a strong farm sector, real Idaho personal income jumped 7.0%. Driven by its construction and services sectors, Idaho's economy picked up speed in 2005. The construction sector received the most attention due to its stellar performance. With construction experiencing such strong growth, the services category's fine performance was often overlooked. Services employment advanced "just" 4.4% in 2006. However, given this sector's huge base, services employment increased by 11,723 jobs, which is more than two times greater than the construction sector gain. It is also worth noting both the state's logging and wood products and mining sectors expanded in 2005. Idaho real personal income grew 3.6% in 2005. Early indicators suggest the economy grew faster in 2006 than in 2005. Idaho nonfarm employment is estimated to have increased 4.3%, which is slightly faster than the previous year's 4.0% rate. The strong employment gains pushed total wage and salary payments up 10.2% in 2006, which helped Idaho real personal income swell 5.8%. Looking ahead, Idaho nonfarm employment is forecast to advance 2.5% annually, which is much faster than it grew earlier this decade. Idaho real personal income should also end the decade stronger than when it started it. It is projected to increase 4.8% per year, which is higher than the 3.4% annual rate from 1999 through 2004.

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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If the U.S. economy were graded on its recent performance, its report card would state that while it may not be failing, it could be doing better. The economy shifted into lower gear in the second half of last year, with real GDP advancing at a meager 2.6% annual rate in the second quarter followed by 2.0% in the third quarter and an estimated 1.2% rate in the last quarter. Real output should begin to accelerate this year, but at less than 3.0% growth it will remain well below its potential. The cooling housing market is partially to blame for this sub-par performance. The impacts of the housing decline will be partially deflected by other economic factors. Nonresidential construction will soften the blow from falling housing starts this year, but it will only provide temporary relief. Eventually, it will weaken under the weight of the ebbing housing sector. Falling oil prices should also help. The roughly 80-cent per gallon decline in gasoline prices since the summer of 2006 has operated like a tax cut for households worth \$96 billion, or 1.0% of disposable income. Another positive factor is trade. Improving economic growth abroad and the declining dollar point to strong exports. Inflation has probably topped out, but it is still too high for the Federal Reserve's comfort. Even so, the Federal Reserve is expected to lower interest rates three times in 2007, so its federal funds rate is 4.5% by the end of this year. After this year, the economy is expected to move up to its potential. Real GDP should advance by at least 3.0% in each year after 2007. Nonfarm employment growth is expected to march to a 1.4% average annual cadence. At this pace, the civilian unemployment rate will eventually fall to 4.4% by 2010, which is comfortably full employment.

http://dfm.idaho.gov/Publications/EAB/Forecast/2007/January/ExecSum_Jan2007.pdf

National Forecast, DFM

http://dfm.idaho.gov/Publications/EAB/Forecast/2007/January/National_0107_vs2.pdf

Other state agencies website for Lewis & Clark – Dept of Commerce

<http://www.lewisandclarkidaho.org/>

History lies with its native tribes, the Lewis and Clark Expedition and determined pioneers on the Oregon Trail. Today's Idaho is both cosmopolitan and yet small-town friendly. Boise, the capital and largest city, developed near Fort Boise along the Oregon Trail and has grown to a population of 190,000. Agriculture, manufacturing and tourism are Idaho's major industries. Abundant outdoor recreation opportunities and scenic vistas around every turn attract over **20 million tourists annually**.



Idaho Division of
Vocational Rehabilitation

2009 - 2013

Content and Format

Since Federal and Idaho State governments operate according to different fiscal years, and since IDVR is accountable to Rehabilitation Services Administration (RSA) on a federal year basis (October 1 – September 30), the agency will use federal year statistics for reporting purposes in this Strategic Plan. This Plan will cover federal fiscal years 2009 through 2013.

The Plan is divided into three sections. The first section focuses on the Vocational Rehabilitation Program and presents specific goals, objectives and strategies for achieving these goals. The following two sections relate to IDVR programs; State Renal Disease and Epilepsy Services.

Vocational Rehabilitation Program Vision Statement

“Your success at work means our work is a success.”

Vocational Rehabilitation Program Mission Statement

“Preparing individuals with disabilities for employment and community enrichment.”

Vocational Rehabilitation Program Goals

Goal #1 – Continually improve the quality of Vocational Rehabilitation services available to eligible Idahoans with disabilities to prepare for, obtain, maintain, or regain competitive employment and long term Supported Employment within the context of available resources

1. **Objective:** Increase the number of individuals who successfully become employed after receiving VR services.

Performance Measure: The number of individuals who successfully achieve the employment outcome objective.

Benchmark: The number of individuals exiting the VR program who achieved an employment outcome shall be equal to or exceed the previous year's performance.

2. **Objective:** Increase the earnings of individuals who successfully become employed after receiving VR services.

Performance Measure: The earning capacity of those who become employed.

Benchmark: The average hourly earnings of individuals exiting the VR program who achieved an employment outcome shall be equal to or exceed the previous year's performance.

3. **Objective:** Increase the number of individuals with significant disabilities placed in employment with long term job support.

Performance Measure: The number of individuals in employment who receive long term support.

Benchmark: The number of individuals with significant disabilities placed into employment with long term job support shall be equal to or exceed the previous year's performance.

4. **Objective:** Utilize Information Technology to its maximum capacity.

A. Performance Measure: Increase the efficiency and capacity of record storage.

Benchmark: Initiate a pilot project on document imaging in one region by 2010.

B. Performance Measure: Information Technology/Skill Development of all personnel.

Benchmark: Ongoing education and training will increase.

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
JUNE 19-20, 2008

5. **Objective:** Statewide consistency for orientation and training to ensure continuity among all levels of staff.

Performance Measure: A comprehensive Training Manual for VR Counselors, VR Assistants, Regional Managers, and Assistant Regional Managers.

Benchmark: One module of the Training Manual will be completed per year over the next four years.

6. **Objective:** Expand Employment Opportunities for Clients

A. **Performance Measure:** Increase participation in the National Employer Network.

Benchmark: Participation shall be equal to or exceed previous year's participation.

B. **Performance Measure:** Implementation and use of the job development pilot project.

Benchmark: Job development pilot project will be implemented and in use by 2009.

7. **Objective:** Enhance revenue opportunities for VR programs.

Performance Measure: Increase grant opportunities and collaboration with other agencies to develop shared projects.

Benchmark: Grant opportunities and collaboration with other agencies will meet or exceed the previous year.

Goal #2 - Ensure that all eligible individuals with disabilities have equal access to services.
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1. **Objective:** Assure that individuals of minority backgrounds have equal access to services

Performance Measure: Maintain or increase the number of individuals from minority backgrounds who successfully become employed after receiving Vocational Rehabilitation services.

Benchmark: The number of individuals with disabilities from minority backgrounds exiting the VR program who achieved an employment outcome shall be equal to or exceed the previous year's performance.

2. **Objective:** Adequately meet the employment needs of the increasing Adult Corrections population statewide.

Performance Measure: Maintain or increase the number of individuals from the Adult Corrections population statewide who successfully become employed after receiving Vocational Rehabilitation services.

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Benchmark: The number of individuals with disabilities from the Adult Corrections population exiting the VR program who achieved an employment outcome shall be equal to or exceed the previous year's performance.

3. **Objective:** Strengthen partnerships with community partners

Performance Measure: Participation in the meetings and activities of community programs including but not limited to the Consortium for Idahoans with Disabilities (CID), Workforce Investment Act (WIA), State Independent Living Council (SILC), Developmental Disabilities Council, Advisory Commission on Correctional Education and Programs, Interagency Working Group, and Secondary Transition Group to support their efforts.

Benchmark: Increase regular attendance

State Renal Disease Program

Mission

To provide financial assistance for lifesaving medical care and treatment to Idaho residents who are experiencing end-stage renal disease; and who do not have the financial resources to meet all their end-stage renal disease medical needs; and for whom work is not an option; or are employed, but unable to afford lifesaving kidney related expenses on a continuing basis.

Vision

No Idaho resident experiencing end-stage renal disease should be at risk of death solely due to the inability to financially secure timely and appropriate medical intervention.

Goal #1 – Provide Idahoans experiencing end-stage renal disease with a program for financial assistance for needs relating to life saving medical services.

1. **Objective:** Achieve an overall satisfactory rating for the State Renal Disease Program.

Performance Measure: The percentage of Idaho residents served in the program.

Benchmark: Achieve a minimum of 90% overall satisfaction rating.

Services to People with Epilepsy

Mission and Purpose

The Epilepsy Foundation of Idaho (EFI) is committed to educating people with epilepsy and their families to assist with the problems associated with the disorder. In so doing, persons with epilepsy achieve a better and higher quality of life and the people of Idaho are served through economic savings and increased revenue. EFI works to achieve these goals through unduplicated, comprehensive programs of information and education, advocacy, prevention and the delivery of needed services. EFI serves people affected by the disorder, regardless of age or other criteria. Service response is provided according to individual needs and delivered in an integrated fashion, i.e. individual or family consultation/counseling (either face-to-face or telephone according to transportation limitations), groups, peer support, etc. and by utilizing all resources and appropriate materials, either written or visual. Needed and appropriate referrals are routinely utilized as part of services.

Role of IDVR

This is a flow-through appropriation with no direct programmatic implication for IDVR. A Strategic Plan is submitted to IDVR by EFI and is included with IDVR's Strategic Plan when submitted to the Division of Financial Management. The following is a summary of EFI's Strategic Plan. Please refer to the plan itself for greater detail.

Goal #1 – Serve Idaho families, children and youth affected by epilepsy.

Objectives:

- Provide epilepsy consultation and outreach services to enable individuals and/or families to understand the disorder and be active members of their treatment team.
- Provide all epilepsy services to diverse cultural groups appropriately.
- Advocate for individual rights. Provide epilepsy education to employers and community agencies including law enforcement departments and service providers with information of legal rights
- Ensure pharmaceutical compliance in financial emergencies preventing unnecessary emergency room visits.
- Facilitate the social and psychological support that other people with similar experiences can provide.

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- Encourage schools to develop understanding and acceptance of children with epilepsy. Seizure recognition and first aid training is provided.

Performance Measure/Benchmark: Serve 2,500 per State Fiscal Year.

Services to People with Epilepsy - continued

Goal #2 – Provide health education/training to public groups and to schools.

Objectives:

- Educate people about the causes of epilepsy to prevent seizure disorders.
- Teach the public about safety and first aid as it pertains to seizures to reduce seizure-related injuries and avoid unnecessary ambulance calls and hospital visits.
- Foster and encourage public understanding and acceptance of people with seizure disorders.

Performance Measure/Benchmark: Provide outreach to 250 individuals per State Fiscal Year.



External Factors Impacting IDVR

The field of Vocational Rehabilitation is dynamic due to the nature and demographics of the clientele served and the variety of disabilities addressed. Challenges facing the Division include:

Technological Advances in Both Assistive Rehabilitation Products and Information Technology

IDVR is dedicated to keeping current of the latest trends in both assistive rehabilitation technology and information technology, and in training Vocational Rehabilitation Counselors and staff. IDVR employs an Information Technology staff to develop innovative ways to utilize technology in carrying out its mission. IDVR also collaborates with the Idaho Assistive Technology Center located at the University of Idaho.

Changes in the Medical Industry

Continuing advancements in the medical industry as well as changes relating to insurance and financial benefits pose complex questions for the Vocational Rehabilitation Counselor. This is especially true in determining eligibility and services. Many IDVR Counselors and Managers are involved with health and disability-related organizations to keep abreast of these changes.

Idaho's Economy

Idaho has seen tremendous growth in its population in the past ten years. This could impact the availability of services to Idahoans. Idaho has also seen a dramatic change in its job market; away from agricultural toward more service, hi-tech and professionally oriented jobs. The environment has always been competitive for IDVR clients. The growth in population has increased the competition for jobs. IDVR recognizes this and strives to develop relationships within both the private and public sectors in an effort to increase employment opportunities for its clients.

Political Climate

The political elements are by far the most difficult for IDVR to overcome since they are essentially out of the control of the Division. At the state level, the Division is subject to legislative action regarding annual budget requests including service dollars and

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personnel expansion. Any legislation pertaining to service provision either by public or private sectors will have a definite impact on Division services and service providers.

IDVR is also affected by decisions made at the federal level. The direction Congress chooses regarding reauthorization of the Rehabilitation Act will impact the future of Vocational Rehabilitation in Idaho. Federal funding decisions, e.g., training grants, block grants, funding reductions, program deletions, changes in health care and employment standards and practices are areas that would impact the Division's planning process.

All staff of the Idaho Division of Vocational Rehabilitation take pride in providing the most effective, efficient services available to individuals with disabilities seeking employment. Management is committed to continued service to the people of Idaho. The goals and objectives outlined in the IDVR Strategic Plan are designed to maximize the provision of services to Idahoans with disabilities as well as promote program accountability,

**State Department of Education
Public Schools Strategic Plan
2009-2013**

Vision: The State Department of Education partners with independent school districts to ensure all students receive an education that prepares students for successful post-secondary education, employment and life.

Goal 1: Ensure students have the skills and knowledge necessary to succeed from kindergarten to high school graduation and post-secondary education.

Objective 1: Improve student achievement at the middle school level.

Performance Measure: Create a Middle School Taskforce to craft recommendations to improve student achievement.

Benchmark: A proposal to increase student achievement in middle school will pass through Legislative rule.

Objective 2: Improve access to post-secondary education while in high school.

Performance Measure: Create a Concurrent Credit Committee to evaluate current access to post-secondary education and recommend enhancement of opportunities.

Benchmark: A proposal to increase concurrent credit opportunities will pass the Legislature.

Goal 2: Ensure every teacher is highly qualified and is compensated for their results to improve student achievement.

Objective 1: Help teachers meet the criteria set forth by No Child Left Behind to be "highly qualified."

Performance Measure: Partner with school districts and utilize federal Title 2 funds to provide professional development opportunities to educators.

Benchmark: Every teacher in Idaho will be deemed as highly qualified.

Objective 2: Create a pay-for-performance system for teachers to reward them for skills, knowledge and student achievement results.

Performance Measure: Partner with educational stakeholders to enhance teacher compensation in Idaho.

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Benchmark: A pay-for-performance plan passes the Legislature in 2009, and teachers receive rewards for their efforts.

Goal 3: Create a longitudinal data system where teachers, administrators and parents have accurate student achievement data for a child's educational career.

Objective 1: Create a unique student and teacher identifier for use statewide.

Performance Measure: Roll out a unique student identifier statewide.

Benchmark: Every student will have a unique student identifier.

Objective 2: Rewrite internal State Department data system known as IBEDS.

Performance Measure: Create a plan to rewrite IBEDS and work with a company known for their educational experience to rewrite code.

Benchmark: A company will be hired to rewrite IBEDS and will complete the rewrite by 2009.

Objective 3: Successfully develop a longitudinal data system.

Performance Measure: Create a system for entering and reviewing data for every student, school, and district in Idaho.

Benchmark: Every student, school, and district can review student achievement data over time.



STRATEGIC PLAN

Annual Update

2009-2013

BOISE STATE UNIVERSITY
STRATEGIC PLAN 2009-2013

Introduction

A present day examination of Boise State University reveals a vibrant picture of a public university with a history of teaching excellence, offering a wide range of degree programs, and serving the citizenry of the state of Idaho. This tradition to strive for excellence is reflected in our vision of becoming a metropolitan research university of distinction.

Boise State's strategic plan defines the path and means to move us from our current state to where we aspire. This journey puts first and foremost the learning environment and our scholarly/creative work to expand the boundaries of knowledge. Our most recent planning process began in early 2005, and initially included over 30 focus groups comprised of more than 600 University faculty, staff and students. Ultimately, a cross section of individuals from our campus community comprised a 40-plus member planning team that drafted the final document, a strategic matrix, providing opportunity for all of our stakeholders to provide input at some point along the way. We are currently in the process of finalizing a complete list of performance benchmarks to measure progress toward these goals.

VISION STATEMENT

Boise State University strives to be a metropolitan research university of distinction.

- A University where **public engagement** links the University's academic mission with its community partners to address issues of mutual benefit.
 - A University of **academic excellence** with high-quality, student-focused programs that integrate theory and practice, engage students in community based learning, and that are informed by meaningful assessment. .
 - A University with a **vibrant culture** that embraces and fosters innovation, responsiveness, inclusiveness, accessibility, diversity, and effective stewardship.
 - A University of **exceptional research** defined by progressive scholarship and creative activity, and graduate programs that have groundbreaking applications locally, regionally and globally.
-

INSTITUTIONAL ROLE AND MISSION STATEMENT

As provided by the State Board of Education, Boise State University will formulate its academic plan and generate programs with primary emphasis on business and economics, engineering, the social sciences, public affairs, the performing arts, and teacher preparation. Boise State University will give continuing emphasis in the areas of the health professions, the physical and biological sciences, and education, and will maintain basic strengths in the liberal arts and sciences, which provide the core curriculum or general education portion of the curriculum.

BOISE STATE UNIVERSITY GOALS & OBJECTIVES*

Goal I. Develop network and outreach opportunities with the community

Objectives:

- Promote and reward research in and with the community.
- Align educational offerings with economic development needs and incorporate employers' input into curriculum design.
- Promote collaboration and sharing of information between campus and the community.

Performance Measures and Benchmarks:

- Students participating in Service Learning Courses
 - Benchmark: Students participating in service learning courses is equivalent to peer institutions

Goal II. Respond to the educational needs of the region

Objectives:

- Align educational offerings with economic development needs and incorporate employers' input into curriculum design.
- Offer flexible course delivery options
- Contribute to the creation of a community college in the Treasure Valley

Performance Measures and Benchmarks:

- Dual enrollment credits generated
 - Benchmark: Dual enrollment credits increase annually

* Objectives support multiple goals

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- Degrees & Certificates Awarded
 - Benchmark: Degrees and certificates awarded is equivalent to peer institutions
- Enrollment Headcount and FTE
- Credit hours taught

Goal III. Provide development opportunities for faculty to integrate research and teaching

Objectives:

- Reward, promote, and publicize student and faculty successes in research and the integration of research with teaching.
- Redesign annual evaluation and promotion and tenure criteria to include integration of research and teaching.
- Secure funds for sponsored research activity.

Performance Measures:

- Number of student participants in Undergraduate Research Conference
 - Benchmark: Number of students participants increases annually
- Externally Funded Grant and Contract Dollars per Faculty FTE
 - Benchmark: External funding for research per faculty FTE is equivalent to peer institutions.

Goal IV. Build and maintain facilities to support programs and create an attractive and accessible environment

Objectives:

- Implement the campus master plan.

Performance Measures and Benchmarks:

- Square feet of space per student.
 - Benchmark: Peer data from Society for College and University Planning
- Square feet of space per faculty member.
 - Benchmark: Peer data from Society for College and University Planning

Goal V. Promote diverse communities that foster faculty, staff, and student interaction

Objectives:

- Create active learning opportunities in-class and out-of-class
- Schedule, promote, and facilitate involvement in cultural and intellectual events
- Develop and promote programs to internationalize campus
- Facilitate faculty collaborations across departments and colleges.

Performance Measures and Benchmarks:

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- Number of students & faculty in study abroad programs
 - Benchmark: Number of students & faculty in study abroad programs is equivalent to peer institutions
- Number of students in on-campus residential halls
 - Benchmark: On-campus halls remain at or near capacity

Goal VI. Recruit and retain an academically prepared and diverse student body

Objectives:

- Expand student recruitment efforts
- Create additional opportunities for student financial assistance
- Implement the Freshman Success Task Force Action Plan

Performance Measures and Benchmarks:

- Freshman Retention Rate (first time full time)
 - Benchmark: Freshman retention rate is equivalent to peer institutions
- 6 year graduation rate (first time full time)
 - Benchmark: 6 year graduation rate is equivalent to peer institutions
- Incoming student High School GPA
 - Benchmark: incoming high school GPA is equivalent to peer institutions
- Scholarship Dollars per Student FTE
 - Benchmark: Scholarship dollars per FTE is equivalent to peer institutions
- Average need-based loans
 - Benchmark: Average need based loans available are equivalent to peer institutions

Goal VII. Recruit and retain faculty and staff to support the vision

Objectives:

- Develop flexible workload policies for faculty.
- Develop a staffing plan, compensation packages, and structures commensurate with a metropolitan research university

Performance Measures and Benchmarks:

- Institutional faculty total compensation as a percent of peer organizations
 - Benchmark: compensation should be comparable at 90-100% of peer institution levels

Goal VIII. Provide student-centered services

Objectives:

- Implement the Freshman Success Task Force Action Plan
- Create active learning opportunities in-class and out-of-class
- Offer flexible course delivery options
- Build residential communities for students, faculty and staff

Performance Measures and Benchmarks:

- National Survey of Student Engagement (NSSE): Student Rating of academic support.
 - Benchmark: Urban university average
- Freshman Retention Rate (first time full time)
 - Benchmark: Freshman retention rate is equivalent to peer institutions
- 6 year grad rate (first time full time)
 - Benchmark: 6 year graduation rate is equivalent to peer institutions
- Number of students in on-campus residential halls
 - Benchmark: On-campus halls remain at or near capacity

Goal IX. Obtain fiscal resources necessary to support the vision

Objectives:

- Secure funds for sponsored research activity
- Promote to the State the value of investing in higher education
- Build and sustain a comprehensive advancement/fundraising program

Performance Measures and Benchmarks:

- Instructional Dollars per Student FTE
- Externally Funded Grant and Contract Dollars per Faculty FTE
 - Benchmark: External funding for research per faculty FTE is equivalent to peer institutions
- Budgeted Faculty FTE to Student FTE
 - Benchmark: budgeted faculty FTE to student FTE should be equivalent to peer institutions
- Institutional faculty total compensation as a percent of peer organizations
 - Benchmark: compensation should be comparable at 90-100% of peer institution levels
- Success in achieving goals of Destination Distinction Comprehensive Campaign
- Scholarship Dollars per Student FTE
 - Benchmark: Scholarship dollars per FTE is equivalent to peer institutions

Key External Factors (beyond the control of Boise State University)

Funding:

Boise State University's strategic goals and objectives assume ongoing and sometimes significant levels of additional funding from the State Legislature. Additional funding to operate comes from private donations and tuition/fee revenue. None of these sources is entirely predictable from year to year.

Legislation/Policies

Beyond funding considerations, policies related to educational offerings, employment practices, capital projects, etc. are embedded in Idaho Code as well as State Board of Education policy. Boise State policies, procedures and practices must adhere to Idaho Code and State Board of Education policy.

Strategic Plan
2009-2013



**Small Business
Development Center**
directions solutions impact

Idaho Small Business Development Center Strategic Plan

Background:

The Idaho Small Business Development Center (Idaho SBDC) was established in 1986 as part of a nationwide network created to improve the success of small businesses. The U. S. Small Business Administration, the State of Idaho, the hosting institutes of higher education, and private donations fund the organization.

The Idaho SBDC is a network of business consultants, trainers, and support staff that operate from the state's colleges and universities. Boise State University's College of Business and Economics serves as the host with administrative responsibility for directing the type and quality of services across the state. Regional offices in the following locations are funded under sub-contracts between the host institutions and Boise State University:

North Idaho College - Post Falls

Lewis-Clark State College - Lewiston

Boise State University - Boise

College of Southern Idaho - Twin Falls

Idaho State University - Pocatello

Idaho State University - Idaho Falls



Services include individualized one-on-one consulting, focused training, and applied research. Staff in these offices are very involved in the business and economic development efforts in their areas and are positioned to respond rapidly to the changing business environment. Ninety percent of Idaho's businesses are within an hour's drive of one of the offices. This allows the Idaho SBDC to effectively and efficiently serve the business community in Idaho.

Vision:

- **To be the primary provider of quality assistance to small business clients, our customers.**

Mission:

- **To enhance the success of small businesses in Idaho by providing high-quality consulting and training.**

Operating Philosophy:

- **Service is the primary product of the Idaho SBDC. Consequently, the Center must be committed to creating and maintaining a high standard of service. This standard has three cornerstones:**

1. **Focus on the Client:** The very future of the Idaho SBDC program depends on creating satisfied clients. To this end, each client contact must be considered an opportunity to focus on client needs and desires. Responding

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quickly with individual attention to specific and carefully identified client needs, then seeking critical evaluation of our performance. This is the routine that will be followed with each client and training attendee.

2. **Devotion to Quality:** Providing consulting and training through a quality process and constantly seeking ways to improve that process are the principles of this cornerstone of service. By fostering teamwork, eliminating physical and organizational barriers that separate people, establishing long-term relationships with partners, and encouraging all to participate in quality improvement are some of the actions that demonstrate the Center's devotion to quality.
3. **Concentration on Innovation:** To innovate is to improve through change. The Center must constantly seek ways to improve its methods and processes, and assume a leadership role in trying new approaches to serve clients. Regular performance reviews, participation in organizations, and attending professional development workshops are some of the ways that the Center identifies and encourages innovation.

Goal 1: Improve the success of small businesses through delivery of our core services – one-on-one business consulting, training and research.

Objective 1.1: Increase the impact of consulting assistance by proactively seeking clients appropriate for long-term consulting assistance.

Performance Measure: Number of hours per client.

Benchmark: Each center will average 8.5 hours per client and maintain or increase in subsequent years.

Performance Measure: Number of long-term clients (greater than 5 hours contact)

Benchmark: 500 statewide

Performance Measure: Number of NxLevelL courses delivered per region.

Benchmark: Deliver at least one NxLevelL course per region per year.

Performance Measure: Number of new business starts

Benchmark: 12 for each Center, 72 statewide

Performance Measure: Capital injection

Benchmark: \$25,000,000 statewide

Performance Measure: Sales growth

Benchmark: \$25,000,000 statewide

Performance Measure: Job Created

Benchmark: 170 statewide

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Objective 1.2: Provide research support to help small business owners and managers in decision-making.

Performance Measure: Number of research projects.

Benchmark: Number of research projects will meet or exceed previous year.

Objective 1.3: Ensure that services are available to minorities and available to all counties.

Performance Measure: % Minority, veteran, and women clients

Benchmark: The percentage of clients served will meet or exceed the minority, veteran, and women business population in Idaho.

Objective 1.4: Identify and address the needs of small businesses and entrepreneurs.

Performance Measure: List of priority needs

Benchmark: The trend in the success measures of our clients reported in the yearly impact study is level or increasing.

Objective 1.5: Expand capabilities to assist high growth companies.

Performance Measure: Number of trainings, professional development activities

Benchmark: Increase the number of high growth companies served by 10%.

Goal 2: Expand and enhance partnerships to strengthen our ability to reach and assist small businesses.

Objective 2.1: Be visible and proactive in solving the business and economic issues in Idaho's rural communities.

Performance Measure: Number of contacts with economic development professionals in rural communities and numbers of clients/trainings in rural area.

Benchmark: The trend is level or increasing.

Objective 2.2: Collaborate with SBA and their resource partners to maximize small business assistance and minimize duplication.

Performance Measure: Number of partnership (SBA and other resource providers) events.

Benchmark: Numbers of events are greater than 10% of total events.

Objective 2.3: Expand the resources of the Center using volunteers from the community, faculty members, students, and other partners.

Performance Measure: Number of consulting hours provided by volunteers.

Benchmark: The trend in consulting hours by volunteers is increasing.

Objective 2.4: Strengthen our funding and position as the primary business development organization.

Performance Measure: SBDC funding

Benchmark: The trend in funding is increasing

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Goal 3: Refine and improve our organization to increase efficiency, effectiveness, and quality.

Objective 3.1: Meet the requirements of Consultant Certification, ASBDC Accreditation, the Operations Manual and the SBA cooperative agreement to assure consistency and quality.

Performance Measure:

1. Number of consultants meeting Certification
2. ASBDC Accreditation

Benchmark:

1. 100% of consultants are Certified
2. ASBDC Accreditation is at minimum "Accreditation with Conditions."

Objective 3.2: Maintain high quality services and customer satisfaction.

Performance Measure: Customer Satisfaction Rate

Benchmark: 90% of the customers rate their service as above average or excellent.

Key External Factors (not under the control of the Idaho SBDC):

Funding:

All strategic goals and objectives assume on-going funding from the State of Idaho and U.S. Small Business Administration.

General Economic Conditions:

All strategic goals and benchmarks assume that the general economic environment is growing (not a recession).

Broadband in Rural Communities:

All strategic goals assume that broadband is available and in-use in rural communities. The use of the internet, webinars, and email is critical to our ability to serve rural businesses efficiently and effectively.

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TechHelp Strategic Plan 2009 – 2013

Vision:

Accessible Organization - TechHelp will be an accessible organization with effective communication flowing to and from its manufacturing customers, partners and employees. TechHelp will also be a learning organization that provides its stakeholders with value-added and mutually beneficial solutions that drive business and personal growth.

Customer Satisfaction - TechHelp will be in the vocabulary of all Idaho manufacturers because of its reputation for business relationships based on long-term commitment, trust, tangible results and putting company interests first. TechHelp will further enhance customer satisfaction by helping businesses transform their operations while helping them become self-sufficient in managing the change.

Statewide Impact - TechHelp will be seen as a public investment that pays for itself through significant returns to businesses, stakeholders and the state economy. Idaho's leaders will be aware of TechHelp's specific contribution to the state economy, including higher productivity and wages, an increased tax base, quality jobs for Idaho graduates, growth in rural areas and improvements to the environment.

Mission:

To provide professional and technical assistance, training and information to strengthen the competitiveness of Idaho manufacturers and targeted service firms through continuous product and process innovation.

Goal I: Impact on Manufacturing – Deliver a positive return on both private business investments and public investments in TechHelp by adding value to the customer and the community.

Objectives for Impact:

1. Offer products and workshops that meet Idaho manufacturers' product and process innovation needs.
 - a. *Performance Measure:*
 - i. Client economic impacts resulting from projects
 - b. *Benchmark:*
 - i. Reported impacts for sales, savings, investments and jobs exceed those reported in the prior year

2. Exceed federal system goals for Manufacturing Extension Partnership.
 - a. *Performance Measure:*
 - i. Score on federal Minimum Acceptable Impact Measures
 - b. *Benchmark:*
 - i. Greater than 85 out of 100 possible points

Goal II: Operational Efficiency – Make efficient and effective use of TechHelp staff, systems and Board members.

Objectives for Efficiency:

1. Improve efficiency of client projects.
 - a. *Performance Measure:*
 - i. Federal dollars expended per surveyable project/event
 - b. *Benchmark:*
 - i. Four-quarter moving average below the national median for all MEP centers
2. Improve effectiveness of client projects.
 - a. *Performance Measure:*
 - i. Bottom-line client impact ratio (sum of client-reported savings plus 15 percent of client-reported sales divided by federal investment in center)
 - b. *Benchmark:*
 - i. Four-quarter moving average above the national median for all MEP centers

Goal III: Financial Health – Increase the amount of program revenue and the level of external funding to assure the fiscal health of TechHelp.

Objectives for Financial Health:

1. Increase total client fees received for services.
 - a. *Performance Measure:*
 - i. Net revenue from client projects
 - b. *Benchmark:*
 - i. Annual net revenue exceeds the budgeted amount
2. Increase external funding to support operations and client services.
 - a. *Performance Measure:*

- i. Total dollars of grants for operations and client services
- b. *Benchmark:*
 - i. Total dollars of grants for operations and client services exceed the prior year's total

Key External Factors

State Funding:

Nationally, state funding is the only variable that correlates highly with the performance of the Manufacturing Extension Partnership centers. State funding is subject to availability of state revenues as well as gubernatorial and legislative support and can be uncertain.

Federal Funding:

The federal government is TechHelp's single largest investor. While federal funding has been stable, it is subject to availability of federal revenues as well as executive and congressional support and can be uncertain.

Economic Conditions:

Fees for services comprise a significant portion of TechHelp's total revenue. A deep downturn in the economy could affect the ability of Idaho manufacturers to contract TechHelp's services.

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**IDAHO COUNCIL
ON ECONOMIC EDUCATION**
Financial Literacy & Economic Education Across Idaho
**Strategic Plan
2009 – 2013**

Vision

Over the next five years Idaho will experience significant improvement in the overall quality of life of its citizens, the competitiveness of its economy in the world marketplace, the economic and financial expertise of its teachers and the financial literacy of its students as a result of the work of the Idaho Council on Economic Education, its affiliated Centers, its sponsoring universities and the Idaho community at large.

Mission

The mission of the Idaho Council on Economic Education and its Centers at the University of Idaho, Boise State University, College of Southern Idaho and Idaho State University is to provide teacher and student training and materials in regard to economic and financial literacy education so that Idaho will be able to compete and prosper in the rapidly changing global economy.

The Council and its Centers work closely with the State Department and Board of Education, local school districts, universities, other government agencies and with the business community to ensure that Idaho teachers and students receive the highest quality training and education available in regard to economic and financial literacy.

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Goals, Objectives and Performance Measures

Goal 1: Community Involvement. Engage Idaho's universities, key government agencies, elected officials, school districts, businesses and the general public in the important mission of economic and financial education of Idaho's youth.

Objective 1: Develop an engaged and active Board of Directors that includes members from all six regions of Idaho, with representation from the above mentioned stake holder groups.

Performance Measures	Benchmarks
• Number of Board Members	12
• Economic events attended by each Board Member	2

Objective 2: Provide community volunteer opportunities in economic and financial education for Idaho's teachers and youth.

Performance Measures	Benchmarks
• Hours of volunteer service	1,600

Goal 2: Training and Materials. Provide training and materials for teachers and students throughout the entire state of Idaho.

Objective 1: Promote, provide and manage the International Economic Summit program throughout Idaho to prepare students to live and work in the rapidly changing global economy.

Performance Measures	Benchmarks
• Summit programs per year	10

Objective 2: Promote, provide and manage financial literacy education throughout Idaho including the Stock Market Game and other programs as appropriate.

Performance Measures	Benchmarks
• Teams participating	1,500

Objective 3: Expand economic and financial education to include on-line programs in order to reach teachers and students who would not otherwise be able to participate.

Performance Measures	Benchmarks
• On-line courses offered annually	1

Goal 3: International Competitiveness. Expand economic education to include international awareness, an understanding of the process of globalization and the ability

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to work with people of other nations with the goal in mind of keeping Idaho competitive in the future.

Objective 1: Provide training to schools with programs in international education

Performance Measures

Benchmarks

- | | |
|--|---|
| <ul style="list-style-type: none">• Number of districts received training annually | 3 |
|--|---|

External Factors

Funding

Operation of the Idaho Council and Centers depends on funding from a variety of sources include the Boise State and the other sponsoring universities, the annual state budgeting process, fees charged for participating in programs and from outside grants and donations. Any disruption of these sources of funding would negatively impact the Council's ability to reach the goals and objectives outlined in this plan.

School Districts and Schools

Programs offered by the Idaho Council and Centers are not mandatory, even though these programs are tied to Idaho's state achievement standards. The Council's ability to reach the goals outlined depends on the willingness and ability of districts and schools to support and participate in the programs offered.

Contact

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Idaho State University Strategic Plan

Mapping Our Future: Leading in Opportunity and Innovation

2009-2013 Executive Summary

Idaho State University

Vision: Idaho State University strives to advance scholarly and creative endeavor through the creation of new knowledge, cutting-edge research, innovative artistic pursuits and high-quality academic instruction; to use these qualities to enhance technical, undergraduate, graduate, and professional education, health care, and other services provided to the people of Idaho, the Nation, and the World; and to develop citizens who will learn from the past, think critically about the present, and provide leadership to enrich the future in a diverse, global society.

State Board of Education-Assigned Mission: As a regional public Doctoral/Research University, Idaho State University meets the needs of a diverse population with certificate, associate, baccalaureate, master's and doctoral degree offerings, as well as family practice, dental, and pharmacy residency programs. Through programs in pharmacy and health-related professions, ISU is the state's lead institution for education in the health professions and related biological and physical sciences. The preparation of teachers, administrators, and other education professionals is another primary emphasis at ISU. Programs in business and engineering respond to a variety of current and emerging demands within the state and region, and, with the change in focus of the Idaho National Laboratory to nuclear science, ISU will expand its programming in this area and continue its leadership. ISU is committed to maintaining strong arts and sciences programs as independent, multifaceted fields of inquiry and as the basis of other academic disciplines. The University offers a substantial array of graduate programs in the arts and sciences, education, and health professions. As a part of its community college function, ISU provides students high quality professional education and technical training in response to the needs of private industry.

GOAL ONE: *Achieve academic excellence in undergraduate, graduate, professional, and technical education.*

OBJECTIVE 1.1: Enhance program excellence through an effective student mix and the maintenance of a strong and balanced student enrollment.

Performance Measure 1: Number of Level 2 (well-prepared) students as a percent of student population.

Benchmark: Number of Level 2 students meets or exceeds last year's numbers.

Performance Measure 2: Overall student enrollment numbers.

Benchmark: Student enrollment numbers meets or exceeds last year's numbers.

OBJECTIVE 1.2: Recruit and retain a faculty that sustains a high quality learning environment through effective teaching, productive scholarship, and committed institutional and public service.

Performance Measure: Number of successful faculty recruitments as a percent of searches implemented.

Benchmark: Number of successful recruitments meets or exceeds last year's numbers.

OBJECTIVE 1.3: Provide library services that enhance the effectiveness of academic programming and research support for students and faculty.

Performance Measure: Fiscal and organizational resources to maintain and enhance existing library resources.

Benchmark: Level of fiscal and organizational resources meets or exceeds last year's level.

OBJECTIVE 1.4: Create and maintain instructional facilities that enhance program effectiveness.

Performance Measure: Level of fiscal and organizational resources to maintain and enhance existing facilities.

Benchmark: Level of fiscal and organizational resources meets or exceeds last year's level.

GOAL TWO: *Increase the University's research profile to strengthen our institutional curricula and ability to meet societal needs through the creation of new knowledge.*

OBJECTIVE 2.1: Develop and maximize the creative and scholarly performance of ISU faculty and students.

Performance Measure: Levels of external grants, awards, and contracts.

Benchmark: Levels meet or exceed last year's level.

OBJECTIVE 2.2: Develop strategic public and private partnerships focused on advancing the institutional mission, programming needs, and the needs of surrounding public and private entities.

Performance Measure: Numbers of public and private partnerships in place.

Benchmark: Numbers of partnerships to meet or exceed last year's numbers.

OBJECTIVE 2.3: Create and maintain research facilities and infrastructure that enhance program effectiveness.

Performance Measure: Level of fiscal and organizational resources to maintain and enhance existing facilities.

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Benchmark: Level of fiscal and organizational resources meets or exceeds last year's level.

GOAL THREE: *Advance medical and health care education throughout the state and region through increasing the quality of healthcare, the number of practicing health care professionals, and promotion of translational research.*

OBJECTIVE 3.1: Increase the numbers of clinical faculty employed by and affiliated with the University.

Performance Measure: Numbers of clinical faculty employed by and affiliated with the University.

Benchmark: Numbers of clinical faculty employed/affiliated meets or exceeds last year's numbers.

OBJECTIVE 3.2: Develop strategic public and private partnerships with health care organizations, facilities, and professional and provider organizations throughout the state and region.

Performance Measure: Numbers of public and private partnerships in place.

Benchmark: Numbers of partnerships to meet or exceed last year's numbers.

OBJECTIVE 3.3: Enhance both governmental support and finances as well as external fund raising focused on health and medical education.

Performance Measure: Levels of governmental support and external grants and contracts focused on health and medical education.

Benchmark: Levels meet or exceeds last year's levels.

OBJECTIVE 3.4: Establish a distributive medical education program to leverage existing health care expertise and serve needs across the State of Idaho.

Performance Measure: Concrete understanding of specific medical education needs across the State of Idaho.

Benchmark: Collaboration with State work group to produce statewide study.

GOAL FOUR: *Prepare students to function in a global society.*

OBJECTIVE 4.1: Enrich learning and research opportunities for both students and faculty through greater development of international programming.

Performance Measure: Numbers of international study and exchange agreements in place.

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Benchmark: Numbers of agreements in place meet or exceed last year's numbers.

OBJECTIVE 4.2: Recruit and retain students, faculty, and staff from underrepresented groups to better serve institutional and community needs for integration of multicultural and gender-related perspectives in our range of programming.

Performance Measure: Numbers of student, faculty, and staff from underrepresented groups as percent of overall numbers.

Benchmark: Numbers in each category meet or exceed last year's numbers.

OBJECTIVE 4.3: Create instructional, research, residential, and social environments that encourage the social integration of all students, faculty, staff, and the larger community.

Performance Measure: Numbers of programs/events that foster peer involvement, social engagement, and institutional connections early in students' college careers.

Benchmark: Numbers of programs/events meet or exceed last year's numbers.

GOAL FIVE: *Focus institutional instructional and research expertise on community and societal needs throughout the state, region, nation, and world.*

OBJECTIVE 5.1: Enhance partnerships with other institutions of higher education throughout the state and region.

Performance Measure: Number of partnerships with other institutions of higher education.

Benchmark: Number of partnerships meets or exceeds last year's number.

OBJECTIVE 5.2: Strengthen partnerships with K-12 organizations to enhance students' abilities to enter and ascend ISU's educational ladder of opportunity.

Performance Measure: Number of partnerships with K-12 organizations.

Benchmark: Number of partnerships meets or exceeds last year's number.

OBJECTIVE 5.3: Develop and maintain continuing education services founded on quality, access, affordability, and flexibility.

Performance Measure: Numbers of continuing education offerings and range of services offered.

Benchmark: Number of offerings and range of services offered meets or exceeds last year's numbers.

OBJECTIVE 5.4: Enhance existing alumni relations and support and develop further resources aimed at supporting the University's mission.

Performance Measure: Update and streamlining of alumni organization data and records processes.

Benchmark: Successful implementation of applicable ERP modules/interface.

GOAL SIX: *Promote the efficient and effective use of resources.*

OBJECTIVE 6.1: Develop a culture of effective and efficient governance based on organization, communication, accountability, consistency, relationship building, and university-wide prioritization.

Performance Measure: Comprehensive institutional strategic plan.

Benchmark: Completion of plan and alignment across colleges/units.

OBJECTIVE 6.2: Provide an administrative infrastructure that provides proper budgeting processes and sound budgetary oversight.

Performance Measure: Comprehensive institutional budget process.

Benchmark: Further refinement of plan and implementation institution-wide.

OBJECTIVE 6.3: Develop a clear and concise Manual of Administrative Policies and Procedures that help to ensure compliance with applicable laws and regulations, promote operational efficiencies, enhance the University's mission, and reduce institutional risks.

Performance Measure: Numbers of MAPPS completed and implemented.

Benchmark: Numbers of MAPPS will meet or exceed last year's numbers.

OBJECTIVE 6.4: Strengthen fiscal controls, with attention to stakeholder involvement and understanding, to maximize the propriety of and control over financial transactions, as well as ensure that assets are protected and costs are incurred only when necessary.

Performance Measure: Numbers of external audit recommendations.

Benchmark: Numbers of recommendations will show decrease or meet last year's numbers.

OBJECTIVE 6.5: Ensure that Information Technology Services supports the university's missions for teaching and learning, research, and administration applications by providing appropriate information and instructional technology and support, built on an effective and reliable information technology infrastructure.

Performance Measure: Fiscal and organizational resources to maintain and enhance existing ITS resources.

Benchmark: Level of fiscal and organizational resources meets or exceeds last year's level.

KEY EXTERNAL FACTORS
(BEYOND DIRECT CONTROL OF IDAHO STATE UNIVERSITY)

Funding:

Many Idaho State University strategic goals and objectives assume on-going and sometimes substantive additional levels of State legislative appropriations. Availability of state revenues, upon which appropriation levels depend, can be uncertain from year to year. Similarly, while gubernatorial and legislative support for ISU efforts are significant, priorities set by those bodies vary from year to year, affecting planning for institutional initiatives and priorities.

Legislation/Rules:

Beyond funding considerations, many institutional and SBOE policies are embedded in state statute or rule and are not under institutional or SBOE control. Changes to statute and rule desired by the institution are accomplished according to state guidelines. As with SBOE rules, rules require public notice and opportunity for comment, gubernatorial support, and adoption by the Legislature. Proposed legislation, including both one-time and ongoing requests for appropriated funding, must be supported by the Governor, gain approval in the germane legislative committees, and pass both houses of the Legislature.

Federal Government:

A great deal of educational and extramural research funding for ISU and the SBOE is provided by the federal government. Funding is often tied to specific federal programs and objectives, and therefore can greatly influence both education policy and extramurally-funded research agendas at the state and the institutional levels.

Local/Regional/National/Global Economic Outlook:

Conventional wisdom has long tied cyclic economic trends to corresponding trends in higher education enrollments. While some recent factors have caused this long relationship to be shaken in terms of monies students and prospective have available for higher education, in general the perceived and actual economic outlooks experienced by students continues to affect both recruitment

into our colleges and universities as well as degree progress and completion rates. As commodities prices for a range of items from food to fuel continue to experience volatility, we can expect students' economic experiences to continue to affect their ability and willingness over the short term to engage higher education.

Regional and National Demographic Trends:

As with economic trends, demographic trends throughout the region and nation continue to affect both recruitment into higher education, as well as a range of progress and completion issues. These changing social demographics and the corresponding changes in our student and prospective student demographics will make it increasingly important for ISU to critically examine our range of services and functions and to continue to refine them to better serve the range of constituencies which constitute our institutional and larger communities.

ISU Department of Family Medicine Strategic Planning

Mission Statement

The Idaho State University Family Medicine Residency provides a collegial learning experience through which residents become mature, competent and compassionate family physicians. In an environment characterized by academic, technological and clinical innovation, each learner and teacher is encouraged to pursue a path of individual professional growth and leadership. From public policy advocacy to cutting edge information technology to high-quality, multidisciplinary care for the underserved, we seek and encourage the best in family medicine

GOAL 1: Access – Recruitment of physicians for Idaho

Objectives for access:

1. Hospitalist – complete formation of PMC/ISU hospitalist program
 - *Performance measure:*
 - Number of hospitalists
 - *Benchmark:*
 - Achieve critical mass of 5 hospitalists
2. Improve residency recruitment methodology
 - *Performance measure:*
 - Number of residents recruited
 - *Benchmark:*
 - All National Residency Matching Program positions filled
3. Achieve accreditation for new rural training track (RTT) in Rexburg
 - *Performance measure:*
 - Application and site visit approval for RTT
 - *Benchmark:*
 - Initial accreditation for RTT granted by Residency Review Committee
4. Expand first-year class to 7 residents to fill RTT
 - *Performance measure:*
 - Number of residents
 - *Benchmark:*
 - Number of residents will increase
5. Assist ISU in developing new medical departments
 - *Performance measure:*

- Number and diversity of medical departments
- *Benchmark:*
 - Number of departments will increase

GOAL 2: Quality – Sustain and continuously improve medical care for Idaho citizens through education, quality improvement, and clinical research

Objectives for quality:

1. Embed quality improvement and pay-for-performance initiatives into all clinical activities
 - *Performance measure:*
 - Quality indicators as quantified by the Medical Quality Improvement Consortium (MQIC)
 - *Benchmark:*
 - Improve MQIC quality indicator scores
2. Develop experiential learning modules for ISU Health Information (HI) degree
 - *Performance measure:*
 - Number of HI experiential learning modules
 - *Benchmark:*
 - Number of HI learning modules will increase
3. Improve resident teaching and documentation of psychosocial issues in electronic health record (EHR)
 - *Performance measure:*
 - Documentation of psychosocial issues in EHR
 - *Benchmark:*
 - Percentage of charts with documentation of psychosocial issues will increase
4. Develop additional pediatric training opportunities with the Spokane Family Medicine Residency Program
 - *Performance measure:*
 - Number of pediatric rotations in Spokane taken by ISU Residents
 - *Benchmark:*
 - Number of pediatric rotations in Spokane will increase
5. Expand clinical research program by identifying new project opportunities
 - *Performance measure:*
 - Number of new clinical research projects
 - *Benchmark:*
 - Number of new research projects will increase

GOAL 3: Efficiency – improve long-term financial viability of the department/residency program

Objectives for efficiency:

1. Identify the best operational and financial structure to maximize funding streams and clinical revenues
 - *Performance measure:*
 - Identify residency structural change with a potential for improving funding streams
 - *Benchmark:*
 - Structural change initiated
2. Transition residency program through change in ownership and administration of Portneuf Medical Center (PMC)
 - *Performance measure:*
 - Level of support from PMC for ISU Family Medicine
 - *Benchmark:*
 - No reduction in financial and programmatic support

Key External Factors (beyond control of the ISU Department of Family Medicine)

These key external factors have been categorized by access, quality, and efficiency.

ACCESS

Workforce needs:

Idaho remains a physician shortage area. The residency is needed to assist the state in recruiting physicians especially for rural areas.

Indigent Care:

The indigent, Medicare and Medicaid patients have poor access to care. The residency is critical to provision of care.

National Institutes of Health Funding:

The program's research division is based on a continuing level of NIH research funding.

Federal Title VII Funding:

The program continues to develop a number of initiatives including a perinatal outreach program, women's health and quality improvement programs based on Title VII grants.

QUALITY

The Family Medicine Residency of Idaho (Boise):

The ISU Family Medicine Residency in Pocatello is dependent on the Boise residency for pediatric training as there is insufficient pediatric training available in Pocatello.

The University of Washington WWAMI program:

Idaho and all the Washington, Alaska, Montana and Wyoming programs are dependent on the UW network for Faculty development programs, director support, interim program evaluations, chief resident training, legislative updates and program research and scholarship enhancement.

EFFICIENCY

Hospital sponsorship:

The residency funding is dependent on hospital sponsorship and pass-through of Medicare medical education funds.

Upper Payment Limit funds:

Federal upper payment limit funds are claimed by the state annually with some pass through both to nursing and physician education.

Medicare:

The level of reimbursement from Medicare to hospitals through cost reporting process underpins graduate medical education throughout the nation.

Community Health Center:

The residency intends to merge with a CHC. Ongoing CHC funding and a maintained relationship is critical to the success of that component of the strategic plan.

Strategic Planning – Mid-term (3-5 years)

The ISU Department of Family Medicine has defined mid-term (3-5 years) and long-term (6-10 years) strategic planning components some of which are outlined below.

GOAL 1: Access – Recruitment of physicians for Idaho

Objectives for access

1. Expand core residency program to 8-7-7 with two residents in RTT
 - *Performance measure:*
 - Number of residents
 - *Benchmark:*
 - Increased number of residents
2. Start a hospitalist fellowship program
 - *Performance measure:*
 - Number of hospitalist fellows
 - *Benchmark:*

- Increased number of hospitalist fellows

GOAL 2: Efficiency – Improve long-term financial viability of the department/residency program

Objectives for access

1. Develop and a Foundation giving plan for a new primary care center of excellence
 - *Performance measure:*
 - Amount of foundation giving
 - *Benchmark:*
 - Increased amount of foundation giving

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Idaho Dental Education Program

STRATEGIC PLAN

2009-2013

MISSION STATEMENT

The Mission of the Idaho Dental Education Program is to provide Idaho residents with access to quality educational opportunities in the field of dentistry.

The Idaho Dental Education Program is designed to provide Idaho with outstanding dental professionals through a combination of adequate access for residents and the high quality of education provided. The graduates of the Idaho Dental Education Program will possess the ability to practice today's dentistry. Furthermore, they will have the background to evaluate changes in future treatment methods as they relate to providing outstanding patient care.

The Idaho Dental Education Program is managed so that it fulfills its mission and vision in the most effective and efficient manner possible. This management style compliments the design of the program and provides the best value for the citizens of Idaho who fund the program.

GOALS OF THE IDAHO DENTAL EDUCATION PROGRAM

The Idaho Dental Education Program (IDEP) serves as the sole route of state supported dental education for residents of Idaho. The IDEP program has been consistent in adhering to the mission statement by fulfilling the following goals:

Goal 1: Provide access to a quality dental education for qualified Idaho residents.

Objective:

Provide dental education opportunities for Idaho residents comparable to residents of other states.

- *Performance Measure:*
 - Contract for 4-year dental education for at least 8 Idaho residents.
- *Benchmark:*
 - Current contract in place with Creighton University School of Dentistry or another accredited dental school.
- *Performance Measure:*
 - Board examination scores on both Parts I and II of the Dental National Boards.
- *Benchmark:*
 - Average National Board examination scores will be above 70%.

- *Performance Measure:*
 - Percentage of first time pass rate on the Western Regional Board Examination or Central Regional Dental Testing Service.
- *Benchmark:*
 - Pass rate will meet or exceed 90%.

Objective:

Provide additional opportunities for Idaho residents to obtain a quality dental education.

- *Performance Measure:*
 - Number of students in the program.
- *Benchmark:*
 - Increase the number of students in the program from 8 to 10.

Goal 2: Maintain some control over the rising costs of dental education.

Objective:

Provide the State of Idaho with a competitive value in educating Idaho dentists.

- *Performance Measure:*
 - State cost per student.
- *Benchmark:*
 - Cost per student will be less than 50% of the national average state cost per DDSE (DDS Equivalent). The cost per DDSE is a commonly utilized measure to evaluate the relative cost of a dental education program.

Goal 3: Serve as a mechanism for responding to the present and/or the anticipated distribution of dental personnel in Idaho.

Objective:

Help meet the needs for dentists in all geographic regions of the state.

- *Performance Measure:*
 - Geographical acceptance of students into the IDEP program.
- *Benchmark:*
 - Students from each of the 4 regions of Idaho (North, Central, Southwest, and Southeast) granted acceptance each year.
- *Performance Measure:*
 - Return rates.
- *Benchmark:*
 - Maintain return rates of program graduates in private practice which average greater than 50%.

Goal 4: Provide access for dental professionals to facilities, equipment, and resources to update and maintain professional skills.

Objective:

Provide current resources to aid the residents of Idaho by maintaining/increasing the professional skills of Idaho Dentists.

- *Performance Measure:*
 - Continuing Dental Education (CDE).
- *Benchmark:*
 - Provide at least one continuing dental education opportunity biannually.
- *Performance Measure:*
 - Remediation of Idaho dentists (if/when necessary).
- *Benchmark:*
 - Successfully aid in the remediation of any Idaho dentist, in cooperation with the State Board of Dentistry and the Idaho Advanced General Dentistry Program, such that the individual dentist may successfully return to practice.

KEY EXTERNAL FACTORS:

Funding:

Most Idaho Dental Education Program goals and objectives assume ongoing, and in some cases additional, levels of State legislative appropriations. Availability of these funds can be uncertain.

Program Participant Choice:

Some IDEP goals are dependent upon choices made by individual students, such as choosing where to practice. As this is beyond our control, we have had an excellent track record of program graduates returning to Idaho to practice.

Student Performance

Some of the goals of the program are dependent upon pre-program students to excel in their preparation for the program. However, we have not encountered difficulty in finding highly qualified applicants from all areas of the State.

**2009-2013
Strategic Plan
Idaho Museum of Natural History**

Approved:

Jennifer Fisher, Director, Idaho Museum of Natural History

Dr. Robert Wharton, Vice President for Academic Affairs, Idaho State University

Dr. Arthur Valais, President, Idaho State University

Seven Strategic Directives were identified that encompass the plan for the Idaho Museum of Natural History over the next three years. These are areas of focus and goals that lead to the delivery of core services and achievement of the vision. They are:

- Fulfill and enhance core services
- Increase revenue
- Strengthen the Museum's professional standing
- Strengthen relationships with key constituents
- Ensure acquisition, retention, and professional development of necessary staff / human resources
- Create and implement a shared Museum vision
- Identify, develop and implement effective, efficient technology systems to support all Museum functions

The goals identified within these areas of focus encompass all Museum activities for the next three years. In a few cases it was recognized that a goal was larger than three years could accommodate, and five years was set as the time frame. Each Goal has supporting objectives with related measures and benchmarks.

Brief History of the Idaho Museum of Natural History

The Idaho Museum of Natural History was founded in 1934 in Pocatello as the Historical Museum at the Southern Branch of the University of Idaho, as Idaho State University was then called. The Museum was established by a group of professors in an effort to collect, preserve, and display the region's natural and cultural heritage

The earliest collections, consisting of about 5,000 objects, were primarily anthropological, archaeological and historical artifacts largely donated by the Pocatello Chamber of Commerce and faculty and supporters of the Southern Branch. The biological collections were developed by faculty in the Biological Sciences Department at approximately the same time. The Museum was governed by a 17-member Historical Museum Committee until the mid-1950's when it was renamed the Idaho State College Museum and its first full-time director was appointed. In 1963, Idaho State College became Idaho State University, and the Museum changed its name to the Idaho State University Museum.

For many years, the Museum's holdings were strewn about the ISU campus in a variety of buildings. In 1976, Museum offices, exhibits and collections finally found a permanent home in the old library building, now known as the Museum Building. In 1977, the museum reoriented its mission to focus on natural history and the Ray J. Davis Herbarium and zoological collections were formally

transferred from the ISU Department of Biological Sciences. Its historical collections were deaccessioned to the Idaho State Historical Society, the Bannock County Historical Society, and the Idaho State University Library.

Also at this time, Museum and university officials worked at the state level to gain recognition for the Museum. In May 1977, the Idaho State Board of Education adopted a resolution requesting that Governor John Evans designate the Idaho State University Museum as the Idaho Museum of Natural History (IMNH); he signed this proclamation on July 1, 1977. In 1986, the Idaho State Legislature confirmed the governor's proclamation by enacting legislation that formally designated the Museum as the official state museum of natural history (Idaho Statute 33-3012)

IMNH now exists as a Special Program of Public Service (with separate line-item funding) of the Idaho State Board of Education, with Idaho State University providing additional support, advocacy and supervision. Currently the Museum holds and cares for over 500,000 natural and cultural objects in its collections areas located in the Museum building's basement and fourth floor. The basement also houses the exhibition fabrication shop and artifact and fossil preparation laboratories. The main floor contains administrative offices, the Education Resource Center, education classroom, and Children's Discovery Room, the Stirton-Kelson Library, exhibition galleries, exhibition graphics studio, and Museum Store. Research areas, including the Idaho Virtualization Laboratory, space for student and visiting researchers, and curator offices are found in the basement and on the fourth floor

In 2009, the Idaho Museum of Natural History will celebrate its 75th birthday

Guiding Principles

Core Functions mandated by Idaho Statute 33-3012

- To collect, care for, research, interpret and present, through educational programs and exhibitions, Idaho's cultural and natural heritage
- To support and encourage local and municipal natural history museums throughout the state of Idaho

Mission Statement

The Idaho Museum of Natural History actively nurtures an understanding of and delight in Idaho's natural and cultural heritage. As the official state museum of natural history, it acquires, preserves, studies, interprets and displays natural and cultural objects for Idaho residents, visitors and the world's community of students and scholars. The Museum also supports and encourages Idaho's other natural history museums through mentoring and training in sound museological practices.

Core Values

Stewardship: We care for collections with dedication and accountability

Community: We engage a diverse community by understanding their interests and empowering their personal relationship with natural and cultural heritage

Excellence: We educate and inspire with professional integrity, scholarship, research and innovation

Respect: We listen, consider, and respond fairly to all voices

Vitality: We flourish by cultivating multiple, diverse avenues of support

Vision of Success

- IMNH is well recognized by its constituents and colleagues for outstanding research, collections, and interpretation of Idaho's natural and cultural treasures. We consistently draw diverse and increasing patronage from scholars, educational institutions, and the public-at-large
- We pursue programs in collections enhancement and research to support our mission
- Our interpretive programs are based on audience input, academic research and professional standards, and are scholarly, meaningful, accessible and engaging
- Idaho natural history museums benefit from IMNH resources and services
- Research, collections, and interpretation have an ample and appropriate facility in accordance with all accepted standards of curation, care and delivery
- Diverse funding sources amply support all aspects of operation and staff positions for IMNH mission areas and the retention of outstanding employees
- Partners – educators, businesses, state and federal agencies, and other community service organizations and individuals – are actively engaged in fulfilling the IMNH mission through contributions of funding, time, expertise and advocacy
- Appropriate technologies support all IMNH mission areas efficiently and effectively

Motto

“Nurturing an understanding of and delight in Idaho's natural and cultural heritage”

Strategic Directives and Goals Objective Plans

Strategic Directive I: Fulfill and enhance core services

Goal 1: Deliver core services

Objectives:

- Collect, care for, research, and interpret Idaho's natural and cultural treasures
- Support and encourage Idaho's natural history museums

Measures:

- Identify natural and cultural treasures that require attention and need to be collected and preserved
- Complete cataloging and data entry for objects in collections
- Reduce number of objects requiring conservation
- Properly accession and store new collections
- Properly process all loan and access requests
- All research initiatives continue to produce results as specified in research plans
- Create educational programs and exhibits to produce results as specified in interpretative and exhibit plans
- Serve on boards and present at conferences of Idaho Association of Museums and Western Museum Association conferences and provide mentoring and traveling exhibits as requested

Benchmarks:

- Meet or exceed the American Association of Museum's Accreditation Program Standards and attain reaccreditation

Goal 2: Strengthen collections and enhance their status

Objectives:

- Evaluate local, national, and international significance of all collections
- Evaluate collections for weaknesses, explore how to correct
- Explore our user audiences and examine venues for promoting our collections to new users
- Explore costs for undertakings identified
- Implement plans as indicated

Measures:

- Report written on significance of collections
- Report written on weaknesses and recommendations for correction
- Explore options for promoting collections such as presenting at conferences, hosting conferences, increasing publications, and attending professional meetings

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- Identify funds needed to address promoting collections to new users and correcting weaknesses in collections
- Collections strengthened and status improved

Benchmark:

- Increase in the total number of users and venues identified equal to or exceeding the preceding year

Goal 3: *Increase space for all Museum functions*

Objectives:

- Assess and prioritize available space and needs
- Develop and implement plan to optimize available space
- Conduct campaign to raise awareness of supplemental space needs
- Explore ideal IMNH facility

Measures

- Comprehensive lists of available space / needs developed
- Detailed lists of needs outlining size and usage developed
- Report written outlining plan to optimize available space for high priority needs developed
- Implement plan to optimize usage of available space implemented
- Invite ISU / SBOE to tour museum and to recognize and support IMNH space needs
- Get ISU / SBOE engaged in seeking solutions for space needs
- White paper addressing ideal IMNH facility produced

Benchmarks

- Increase in the amount of space utilized by all museum staff, collections, and functions

Goal 4: *Increase Museum research opportunities*

Objectives:

- Develop materials that describe IMNH strengths and research opportunities
- Meet with appropriate entities (e.g. ISU departments, state agencies, etc.) to disseminate information and investigate partnerships
- Hold retreat-like forum to discuss IMNH strengths and opportunities
- Hold second forum to present and vet the ideas
- Explore refined list
- At least one idea is being pursued

Measure:

- Prepare presentation package
- Present all ISU departments with strengths and depth of IMNH for research opportunities

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- White paper assembled with list of potential areas to explore and a plan for whom, when, and how
- Refined list of ideas assigned for further fleshing out (resources needed, start-up and sustainability costs, funding opportunities)
- White paper prepared describing each idea

Benchmark:

- Increase IMNH funding through grants, contracts, and external funding from previous year

Goal 5: *Strengthen Museum exhibits and educational programs to better represent mission, research, and collections for a wider audience*

Objectives:

- Develop and implement interpretive plan reflecting our mission, research, and collections and which rigorously incorporates audiences' needs and curriculum standards

Measure:

- Creation of interpretive plan to assist with development of exhibits and educational programs in accordance with the IMNH Strategic Plan

Benchmark:

- Increase in the number of exhibits, temporary exhibits, and educational programs produced and assessed

Goal 6: *Attain economic self-sufficiency for the Museum Store*

Objectives:

- Create business plan for Museum Store
- Create a viable Museum E-store
- Increase sales for on-site Museum Store
- Make store manager position full-time and permanent

Measure:

- Business plan is created and implemented
- Museum E-store is created and implemented
- Store manager position becomes full-time and permanent

Benchmark:

- Amount of increase in store sales at least 10% over previous year bringing the store toward economic self-sufficiency

Goal 7: *Expand IMNH Membership Program*

Objectives:

- Increase IMNH Membership by conducting a yearly membership drive
- Initiate Kid's Membership Program
- Encourage broader community support
- Increase member participation in Museum events

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- Integrate and coordinate membership events with Museum divisions and activities
- Develop and implement membership events schedule
- Follow through with membership benefit events and recognition at each level

Measures:

- Assess effectiveness of annual membership drives
- Assess interest in kids membership program, and, if sufficient interest establish strategies and protocols
- IMNH and the Friends of the Museum will co-sponsor at least one successful activity to encouraged broader community support of the Membership Program
- Monthly meetings for staff to integrate and coordinate membership events
- Explore donor recognition

Benchmarks:

- White paper produced outlining history, current relationship and potential role of the Friends of IMNH
- Member survey developed and data collected; results assessed and protocols developed
- Several meetings have been held with the Friends' to explore potential partnerships that encourage broader community support of the Membership Program
- Continually assess protocols, membership benefits, members events and recognition strategies, and increase member participation by 10% over preceding year

Goal 8: *Explore and pursue opportunities to publish Museum-related topics*

Objectives:

- Assess audiences for Museum-related publications
- Based on audience assessment, develop a business plan for Museum-related publications, if indicated
- Pursue opportunities to publish Museum-related topics, if indicated
- Business plan for publishing Museum-related topics implemented

Measures:

- Profile of IMNH publications audiences obtained
- Create a business plan for producing and marketing publications
- Develop Museum-related publications
- Pursue publication opportunities

Benchmarks:

- Number of publications successfully planned, completed, and offered to constituent groups

Strategic Directive II: *Increase revenue*

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Goal 1: *Pursue funding from repositing agencies in support of collections*

Objectives:

- Examine existing agreements and other repository structures
- Track IMNH resources currently expended for repository activities
- Review national repository storage and processing fees
- Solicit MOUs from repositing agencies
- Prepare and send letter to repositing agencies including status report for their collections; solicit their comments
- Explore marketing our repository services to a regional audience
- Actively track and support appropriate legislation that funds repositing agencies' collection activities
- Follow up as indicated

Measures:

- Letters and reports sent; feedback received
- Feasibility report produced

Benchmarks:

- Report of findings produced
- MOUs with 100% of agencies repositing collections at IMNH
- Funding for repository collections increased by 10% over the previous year

Goal 2: *Foster an environment to enable exploring and pursuing more grant opportunities*

Objectives:

- Brainstorm with staff about potential projects suited to grants
- Prioritize projects based on available staff and resources
- Identify available granting resources, especially funding sources for previous IMNH projects, and identify matching requirements
- Based on priority ranking and available matching resources, begin writing grants
- Follow up as indicated

Measures:

- Identify and produce prioritized list of projects to pursue
- Identify available resources and matching requirements
- Submit grant proposals by appropriate deadlines

Benchmarks:

- Increase in the number of grant proposals submitted from previous year
- Increase in the number of grant proposals received from previous year
- Increase in the total dollars received from grant funding

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Goal 3: *Increase sponsorships for public programs*

Objectives:

- Determine sponsorship opportunities for programs as they arise
- Develop sponsorship approach for each program
- Create list of appropriate potential sponsors based on approach
- Create sponsorship pitch materials for each program (as needed)
- Secure sponsorships

Measures:

- Identify sponsorship opportunities
- Generate list of potential sponsors for each program
- Solicit support from potential sponsors

Benchmarks:

- Sponsorship money will increase by 10% over previous year

External Factors Influencing this Goal

- Competitive funding environment challenges our ability to present Museum opportunities to potential sponsors

Strategic Directive III: Strengthen the Museum's visibility and professional standing

Goal 1: *Strengthen Museum visibility and name recognition*

Objectives:

- Assess current Museum visibility and name recognition
- Create annual general Museum marketing plan
- Implement strategies from marketing plan
- Develop strategies for differentiating IMNH from other museums
- Track marketing plan success

Measures:

- Update marketing plan
- Implement strategies and protocols
- Track visitation and log visitor comments
- Surveys created and implemented; results tabulated

Benchmarks:

- Attendance at Museum programs will increase over previous year
- Percent of visitation will increase over previous year
- Number of newspaper, television, and other media spots will increase over previous year

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Goal 2: *Attain reaccreditation with the American Association of Museums*

Objectives:

- Secure or develop required documents, as necessary
- Complete Self-Study
- Host Visiting Committee for on-site reaccreditation evaluation
- Museum reaccreditation secured

Measures:

- All required documentation identified and developed
- Self-study questionnaire and required documentation completed and submitted on time
- On-site evaluation completed

Benchmarks:

- Fully reaccredited without concerns or conditions

Goal 3: *Complete and implement American Association of Museum's Museum Assessment Program (MAP) III - Public Dimension Assessment (PDA)*

Objectives:

- Implement peer reviewers' Assessment Report

Measures:

- Implementation goals assessed during yearly strategic planning; progress form completed and submitted on time

Benchmarks:

- Meet or exceed the recommendation made by the Assessment Report

Goal 4: *Conduct year-long state-wide 75th Anniversary celebration for Museum in 2009 - 2010*

Objectives:

- Secure the support of key entities (ISU administration/departments, SBOE)
- Convene Celebration Committee
- Develop Celebration timeline and budget
- Plan activities and secure sponsors
- Hold year-long state-wide celebration of Museum's 75th Anniversary

Measures:

- Secure support of key entities
- Identify and select potential committee members and hold regular meetings
- Celebration timeline and budget developed
- Activities planned and sponsors secured

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Benchmarks:

- Host a successful year-long state-wide celebration of the Museum's 75th Anniversary beginning December 2009
- Secure long-term support and increased funding for IMNH

Strategic Directive IV: Strengthen relationships with key constituents

Goal 1: Increase understanding of users of core Museum services, their needs, and their preferred receipt of services

Objectives:

- Review previous surveys for information about who our audiences are and what we learned from the survey process
- Develop new surveys for visitors and the community-at-large to test their needs and how they would like them delivered
- Hold focus groups to learn how IMNH can better serve its audiences
- Create a statewide Museum Advisory Board
- Track, analyze, and use information gathered to shape core services

Measures:

- Create report of audience findings and target audience
- Create and implement at least one survey
- Create and hold at least one focus group
- Create list of potential board members, create advisory board and begin holding regular meetings
- Summary report with recommendations produced

Benchmarks:

- Using input from surveys and focus groups, the Museum will identify the communities it serves and makes appropriate decisions in how it serves them
- Advisory board is created with representation from around the state

Goal 2: Strengthen relationship with ISU administration, faculty, students and the community-at-large

Objectives:

- Assess and strengthen the relationships with ISU administration, faculty, students, and other major entities such as Obler Library and the Center for Ecological Research and Education
- Assess and strengthen relationships with likely community partners

Measures:

- Develop and implement survey to identify key issues and explore solutions
- Hold regular meetings between director and key administrators, deans, directors, department chairs, etc

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- Invite at least three key administrators, deans, directors, department chairs, etc. to tour the Museum
- Invite ASISU officers and/or Senate to tour the Museum
- Present a \$.50/per student budget request to ASISU to be allocated to support IMNH and to allow students better access to the Museum and its programs
- Follow up on recent successes, and continue to host events directed toward the ISU community
- Work with ISU community partners to encourage their support and participation in Museum activities.

Benchmarks:

- Increase in the number of ISU visitors and ISU partners working with the museum over the previous year
- Increase in the number of community visitors and communities partners working with the museum over the previous year

Strategic Directive V: Ensure acquisition, retention, and professional development of necessary staff / human resources

Goal 1: Increase opportunities for professional development

Objectives:

- Assess professional development needs
- Identify professional development opportunities
- Develop and implement a plan to provide increased professional development
- Regularly assess and revise plan for increased professional development

Measures:

- Assess all staff's professional development needs and identify professional development opportunities
- Create and implement a plan for increased professional development
- Reassess professional development needs on an annual basis

Benchmarks:

- 100% of staff are able to pursue at least one professional development opportunity each year

Goal 2: Increase number of human resources (work study, undergraduate and graduate students, volunteers and/or paid staff)

Objectives:

- Identify our current human resource base and sources
- Identify specific projects that require additional assistance and explore avenues for filling those needs
- Monitor and enhance volunteer services program

Measures:

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- Annually project human resource needs and submit requests through the budget process
- Explore additional avenues for filling additional assistance needs such as work study, student interns, etc
- Continue to recruit volunteers

Benchmarks:

- AAM's Characteristics of an Accreditable Museum require that the composition, qualifications, and diversity of the Museum's leadership, staff, and volunteers enable it to carry out the Museum's mission and goals
- Increase in the number of volunteer service hours
- Number of human resources increased over the previous year

External Factors Influencing this Goal

- Many IMNH strategic goals and objectives assume ongoing and substantive levels of State line-item legislative appropriations. Availability of state revenues, upon which appropriations depend, has been woefully inadequate to meet human resource needs

Goal 3: Review job descriptions and performance plans for all Museum functions

Objectives:

- Assess Strategic Plan and job descriptions to determine relevancy of educational advancement, degree attainment, and skill development of staff and faculty
- Create new job descriptions/performance plans to account for relevant changes

Measures:

- Revise and update all staff and faculty job descriptions and performance plans and have them approved by appropriate administrative units and agencies.

Benchmarks:

- In accordance with the AAM's Characteristics of an Accreditable Museum, 100% of staff will have an accurate and completed job description and performance plan in place

Strategic Directive VI: Create and implement a shared Museum vision

Goal 1: Create and implement a shared Museum vision
"We've planned the work . . . Now, we work the plan together"

Objectives:

- Strengthen team work
- Perform long-range planning and assess sustainability
- Identify and prioritize long-term goals (5 to 10 year)

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Measures:

- Hold regular team-building activities
- Assess and prioritize current IMNH activities and resources with regard to planning and sustainability; revisit Strategic Plan semiannually and revise if necessary
- Annual meetings held to identify and prioritize long-term (5-10 years out) goals; goals folded into Strategic Plan as indicated

Benchmarks:

- 100% of staff and faculty are offered the opportunity to participate in long-term planning and the prioritization of goals along with training, development, and team-building activities

Goal 2: *Increase Opportunities for Institutional Development*

Objectives:

- Assess institutional development needs
- Identify institutional development opportunities
- Develop, implement, and assess plan to provide for increased institutional development

Measures:

- Compile a list of institutional development needs and available opportunities
- Create a plan for increased institutional development
- Plan to increase institutional development opportunities implemented
- Revised plan to increase institution development opportunities implemented

Benchmarks:

- The Museum's governing authorities and staff will think and act strategically to acquire, develop, and allocate resources to advance the mission of the Museum

External Factors Influencing this Goal

- For the Museum to operate in a fiscally responsible manner requires ongoing legislative and ISU support. The nature of the funding environment, historically, has not allowed this to occur. For example, over the past 15 years over 50% of the Museum's funded staff positions were eliminated. Additionally, the past external organizational structure has impeded the Museum's ability to seek outside funding. Today, however, to assist in effectively advancing the Museum's mission, there is a clear and formal indication that Idaho State University, through its new president and leadership team, will support and help advance IMNH and its mission and vision

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Lewis-Clark State College

Strategic Plan Summary

FY2009-2013

Lewis-Clark State College

Strategic Plan FY2009-2013

VISION STATEMENT

Unique among Idaho's institutions of higher education, LCSC will fulfill the SBOE vision of a seamless public education system by integrating traditional baccalaureate programs, professional-technical training programs, and community college and community support programs within a single institution, serving diverse needs within a single student body, and providing outstanding teaching and support by a single faculty and administrative team. LCSC's one-mission, one-team approach will prepare citizens from all walks of life to make the most of their individual potential and contribute to the common good by fostering respect and close teamwork among all Idahoans. Sustaining a tradition that dates back to its founding as a teacher training college in 1893, LCSC will continue to place paramount emphasis on quality of instruction—focusing on the quality of the teaching and learning environment for traditional and non-traditional academic classes, professional-technical education, and community instructional programs. Lewis-Clark students' personalized instruction will be complemented by personal application of knowledge and skills in the real world, as embodied in the College's motto: "*Connecting Learning to Life.*" LCSC will be an active partner with the K-12 school system, community service agencies, and private enterprises and will support regional economic and cultural development. LCSC will strive to sustain its tradition as the most accessible four-year higher-education institution in Idaho by rigorously managing program costs; student fees; housing, textbook, and lab costs; and financial assistance to ensure affordability. LCSC will vigorously manage the academic accessibility of its programs through accurate placement, use of student-centered course curricula, and constant oversight of faculty teaching effectiveness. LCSC will nurture the development of strong personal values and will emphasize teamwork to equip its students to become productive and effective citizens who will work together to make a positive difference in the state, the nation, and the world.

MISSION STATEMENT

LCSC's official role and mission statement (approved by the SBOE in 1998) is provided below:

1. Type of Institution

Lewis-Clark State College is a regional state college offering undergraduate instruction in the liberal arts and sciences, professional areas tailored to the educational needs of Idaho, applied technical programs which support the state and local economy and other educational programs designed to meet the needs of Idahoans.

Lewis-Clark State College will formulate its academic plan and generate programs with primary emphasis in the areas of business, criminal justice, nursing, social work, teacher preparation, and professional-technical education. The College will give continuing emphasis to select programs offered on and off campus at non-traditional times, using non-traditional means of delivery and serving a diverse student body. Lewis-Clark State College will maintain basic strengths in the liberal arts and sciences, which provide the core curriculum or general education portion of the curriculum.

2. Programs and Services (listed in order of emphasis)

- **Baccalaureate Education:** Offers a wide range of baccalaureate degrees and some qualified professional programs.
- **Associate Education:** Offers a wide range of associate degrees and some qualified professional programs.
- **Certificates/Diplomas:** Offers a wide range of certificates and diplomas.
- **Distance Learning:** Uses a variety of delivery methods to meet the needs of diverse constituencies.
- **Technical and Workforce Training:** Offers a wide range of professional, technical and outreach programs.
- **Continuing Education:** Provides a variety of life-long learning opportunities.
- **Research:** Conducts select coordinated and externally funded research studies.
- **Graduate:** None.

3. Constituencies Served: The institution serves students, business and industry, the professions, and public sector groups primarily within the region and throughout the state, as well as diverse and special constituencies. Lewis-Clark State College works in collaboration with other state and regional postsecondary institutions in serving these constituencies.

I. QUALITY: Sustain and continually improve the quality of Idaho's public education, training, rehabilitation, and information/research programs and services.

Objectives for quality

1. Continue developing a compensation system that rewards LCSC employees for knowledge, skills, and productivity while promoting recruiting, hiring, and retention.
 - **Performance Measure:**

- Median total compensation by classification as a percentage of peer institutions.
 - **Benchmark:** All faculty and staff compensation within 90% of median for peer institutions, normalized for CPI and location. (SBOE benchmark)
- 2. Continue activities to insure re-accreditation by NWCCU on 2009.
 - **Performance Measure:** Complete self-study.
 - **Benchmark:** Completion of self-study by Spring 2009- Y/N.
- 3. Continue successful specialized accreditation efforts.
 - **Performance Measure:** Specialized program accreditation for Social Work Program.
 - **Benchmark:** Re-affirmation of Social Work Program accreditation by the Council on Social Work Education (CSWE)-Y/N
- 4. Update Campus Facilities Master Plan
 - **Performance Measure:** Updated campus master plan completed by May 2009 reflecting progress of NHS Building construction.
 - **Benchmark:** Completion of NHS Building on schedule- Y/N.
- 5. Increase participation in Employee Professional Development and Training (PDT) Process.
 - **Performance Measure:** Develop an assessment instrument and a procedure that provides for continuous assessment and improvement of PDT course content and delivery, scheduling, facilities, and equipment.
 - **Benchmark:** Increase number of contact hours of instruction: 5%
- 6. Increase student participation in Student Course Evaluations (SCE).
 - **Performance Measure:** Percentage of students enrolled in class on the tenth school day of each semester completing course evaluations for each course.
 - **Benchmark:** Seventy percent of all students enrolled in class on the tenth school day of each semester will complete course evaluations.

II. ACCESS: Continually improve access for individuals of all ages, abilities, and economic means to the public education system, training, rehabilitation, and information/research programs and services.

Objectives for access

1. Explore options for extending and/or shifting course schedules to meet student demand.
 - **Performance Measure:** Number of classes offered at non-traditional times.
 - **Benchmark:** Increase number of classes offered at non-traditional times.
2. Increase number of high school students participating in concurrent enrollment.
 - **Performance Measure:** Enrollment data (headcount).
 - **Benchmark:** Increase enrollment in concurrent enrollment classes: 4%.

3. Update and revise the long-range plan to address how LCSC can meet regional health care needs.
 - **Performance Measure:** Enrollment in health care profession programs.
 - **Benchmark:** Enrollment in BSN, RN to BSN, and RAD-Tech will be within 90% of projections.
4. Increase cooperative initiative with NIC in CdA.
 - **Performance Measure:** Number of students concurrently enrolled at NIC and LCSC.
 - **Benchmark:** Increase the number of students concurrently enrolled at NIC and LCSC:10%
5. Improve core-completion.
 - **Performance Measure:** The number of students completing core requirements within 4 years.
 - **Benchmark:** FY 2008 number of students completing core requirements.
6. Address planning considerations for upgrade and usage of other older residence facilities.
 - **Performance Measure:** Keep Talkington Hall on Building Fund List.
 - **Benchmark:** Talkington Hall maintained on Building Fund List- Y/N.
7. Optimize residential space utilization: Purchase Clearwater Hall.
 - **Performance Measure:** Complete purchase of Clearwater Hall.
 - **Benchmark:** Purchase of Clearwater Hall completed- Y/N.

III. Efficiency: Deliver educational training, rehabilitation, and information/research programs and services through the public education system in a manner which makes effective and efficient use of resources.

1. Sustain or increase current ratio of Total Budget/ Annual FTE enrollment.
 - **Performance Measure:** Operating Budget/ Annual FTE enrollment ratio.
 - **Benchmark:** Current LCSC values are the lowest of Idaho's four- year schools. Increasing LCSC's operating budget by at least 3% would sustain or increase the ratio of Operating Budget/ Annual FTE enrollment and allow LCSC to become more effective at service delivery.
2. Implement e-commerce system.
 - **Performance Measure:** e-commerce feasibility study.
 - **Benchmark:** Feasibility study completed by Spring 2009-Y/N.

Key External Factors (Beyond control of Lewis-Clark State College):

Funding:

Most Lewis-Clark State College strategic goals and objectives assume on-going and sometimes significant additional levels of State legislative appropriations provided through the SBOE. Availability of state revenues (for appropriation), gubernatorial, and legislative support for some initiatives can be uncertain.

Legislation/Rules/Policy:

Beyond funding considerations, many education policies are embedded in state statute, rule, or SBOE policy and not under the control of LCSC.

Federal Government:

A great deal of educational funding is provided by the federal government. Funding for higher education is subject to congressional and executive support.

Economy: Historically, strong economic performance indicators have translated into reduced student numbers. The availability of well-paying jobs leads many potential students to choose employment over education.



University of Idaho

STRATEGIC PLAN

2009-2013

The University of Idaho STRATEGIC PLAN 2009-2013

The University of Idaho is an internationally recognized land-grant institution combining research, graduate, and professional education with a strong undergraduate base in the liberal arts and sciences.

VISION STATEMENT

Our *teaching and learning* activities seek to engage every student in a transformative journey of discovery and understanding. Our *scholarly and creative activity* aspires to generate knowledge that strengthens the scientific, economic, cultural, social, and legal foundations of an open, diverse, and democratic society. Our *outreach and engagement* facilitates lifelong learning and energizes the development of prosperous and environmentally sound communities, while enhancing the relevance and excellence of our academic enterprise. Programs in the arts and athletics aspire to high levels of accomplishment and visibility.

Our work is shaped by a passion for knowledge, innovation and creativity, by the rigor of high academic and ethical standards, by the attainment of each individual's full human potential, by the enrichment generated through diversity, and by the dissolution of cultural and organizational barriers. We are committed to improving our community, the communities we serve, and the facilities necessary for us to fulfill our vision and mission.

We emphasize quality and access, focusing our efforts on sustaining strong programs and investing resources in strategic directions that advance the interests of Idaho in an increasingly interdependent and competitive world. Through collaboration across strong academic disciplines, and through the creation of public, private, and community partnerships, we will undertake bold initiatives to promote science, technology, and their applications; to invigorate the liberal arts and sciences; to catalyze entrepreneurial innovation; to steward the natural environment; and to develop the design, lifestyles and civic infrastructures of sustainable communities.

MISSION STATEMENT

Type of Institution

The University of Idaho is a high research activity, land-grant institution committed to undergraduate and graduate-research education with extension services responsive to Idaho and the region's business and community needs. The University is also responsible for regional medical and veterinary medical education programs in which the state of Idaho participates.

The University of Idaho will formulate its academic plan and generate programs with primary emphasis on agriculture, natural resources, metallurgy, engineering, architecture, law, foreign languages, teacher preparation and international programs related to the foregoing. The University of Idaho will give continuing emphasis in the areas of business, education, liberal arts and physical, life, and social sciences, which provide the core curriculum or general education portion of the curriculum.

Programs and Services

Baccalaureate Education: Offers a wide range of baccalaureate and professional programs.

Graduate-Research: Offers a wide range of masters, doctoral and professional programs and also coordinate and conducts extensive research programs that are consistence with state needs.

Extension Services, Continuing Education and Distance Education: Supports extension offices throughout the state in cooperation with federal, state and county governments, provides life-long learning opportunities and uses a variety of delivery methods to meet the needs of select, yet diverse constituencies in the state and region.

Associate Education: None

Certificate/Diplomas: Offers academic certificates representing a body of knowledge, that do not lead to a degree.

Technical and Workforce Training: None

Constituencies Served

The institution serves students, business and industry, the professions and public sector groups throughout the state and nation as well as diverse and special constituencies. The university also has specific responsibilities in research and extension programs related to its land-grant functions. The University of Idaho works in collaboration with other state postsecondary institutions in serving these constituencies.

Teaching & Learning

Goal I: *Engage students in a transformational experience of discovery, understanding, and global citizenship.*

Objective A: Build and sustain competitive advantages through innovative curricula of distinction.

Performance Measure: The number of programs engaged in assessment processes that result in the review and refinement of curricular and/or co-curricular learning activities to strengthen student learning.

Benchmark: Eighty-five percent of the programs completing the assessment cycle will have developed actions strategies for making improvements by December, 2008.

Objective B: Develop effective integrative learning activities to engage and expand student minds.

Performance Measure: Students will participate in experiential learning opportunities (research, service learning, study abroad, internships) during their UI experience.

Benchmark: A tracking system will be established by Fall 2009 and baseline data on participation will be collected in order to set a benchmark by summer 2010.

Scholarly and Creative Activity

Goal 2: *Achieve excellence in scholarship and creative activity through an institutional culture that values and promotes strong academic areas and interdisciplinary collaboration among them.*

Objective A: Promote an environment that increases faculty engagement in interdisciplinary scholarship.

Performance Measure: Faculty Position Description and Performance Evaluation forms will explicitly recognize interdisciplinary work and outreach/engagement.

Benchmark: Definitions of interdisciplinary work and outreach/engagement along with an appropriate target of participation will be developed by Fall 2009.

Objective B: Emphasize scholarly and creative activities that support the University's strategic themes, the research-extensive and land grant missions, and strategically important graduate and professional programs.

Performance Measure: Relative compensation for both Teaching Assistants and Research Assistants will be increased annually as compared with the Graduate Assistant Stipend Survey rankings produced by Oklahoma State University.

Benchmark: Each year the University will improve its overall average rank in the Oklahoma State University Graduate Assistant Stipend Survey.

Outreach and Engagement

Goal 3: *Engage with the public, private and nonprofit sectors through mutually beneficial partnerships that enhance teaching learning, discovery and creativity.*

Objective A: Build upon, strengthen and connect the University of Idaho Extension with other parts of the University to engage in mutually beneficial partnerships with stakeholders.

Performance Measure: Average percent of faculty FTE dedicated to outreach.

Benchmark: A tracking system, baseline data and performance benchmark will be established by Spring 2009.

Objective B: Deliver undergraduate, graduate, continuing professional education and Extension programs and opportunities for lifelong learning.

Performance Measure: Students will participate in service learning opportunities during their UI experience.

Benchmark: A system of tracking student hours of participation will be established by Fall 2009 and baseline data will be collected in order to set a benchmark by summer 2010. (This is a subset of Goal 1, Objective B.)

Organization, Culture and Climate

Goal 4: *Create and sustain an energized community that is adaptable, dynamic and vital to enable the University to advance strategically and function efficiently.*

Objective A: Sustain and enhance a positive work climate to enhance the quality of University life.

Performance Measure: Quality of University life will be measured using campus surveys by Spring 2009.

Benchmark: Survey results will provide baseline data against which quality of University Life will be measured at regular intervals, and benchmarks will be established by summer 2010.

Objective B: Sustain and enhance an organizational structure, policies and procedures that enable the University to attain its other goals.

Performance Measure: Participation by UI Faculty and Staff in university-wide learning and professional development programs.

Benchmark: Twenty-five percent of faculty and staff will have participated in professional development programs by Fall 2009.

Performance Measure: Students will have access to supportive and effective advising.

Benchmark: A system for tracking student advising opportunities and standards for advising will be developed, and baseline data collected by Spring 2009.

Key External Factors:

State Board of Education (SBOE): Achievement of strategic goals and objectives assumes SBOE support and commitment to UI's unique role and mission.

New Leadership: Achievement of strategic goals and objectives assumes understanding and support for the UI's vision and strategic plan by the new president.

Funding: Economic conditions will play an important role in the perceived value and effectiveness of higher education in the coming years. On-going and appropriate levels of funding from state and federal sources will be critical for the success of our strategic plan.

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University of Idaho

Idaho WOI (WI)/
Caine Veterinary Teaching Center

STRATEGIC PLAN

2009 - 2013

Idaho-WOI (WI)/Caine Veterinary Teaching Center

STRATEGIC PLAN 2009-2013

Vision:

The Faculty and Staff of the Caine Veterinary Teaching Center, by their commitment to promoting animal and public health, contribute to the benefit of society. The responsibility of transferring science-based, medically related information and technology to veterinary students, veterinarians, animal owners and caretakers and the public concerning animal and related human health, food safety, and the environment through education, research, public service, and outreach, effects positive changes in the livelihood of the people of Idaho and the region.

Mission Statement:

The Faculty and Staff of the Caine Veterinary Teaching Center will address the animal health needs of the food animal industry of Idaho through education, research, public service, and outreach by providing:

- Formal hands-on educational experiences in production animal medicine and management for senior students in the Washington-Idaho professional veterinary medical education program,
- Research on production animal diseases and management,
- Laboratory and on-farm disease diagnostic expertise for the production animal industry,
- Continuing education programs for veterinary practitioners and specialists,
- Outreach and continuing educational programs for livestock producers and allied industry groups, and
- Information to the public concerning zoonotic and animal diseases, and their impact on human health, food safety, and the environment when requested or appropriate.

Authority and Scope:

The funds for this Program are appropriated annually by the legislature since 1973. Originally, it was for the purpose of providing 15 seats for Idaho resident students per year at WSU School of Veterinary Medicine (but was later reduced to 11).

The Caine Center was opened in September 1977, in Caldwell, as a part of Idaho's contribution to the Program. It is a University of Idaho, off-campus unit and is part of the Animal and Veterinary Science (AVS) Department in the College of Agricultural and Life Sciences. The Center serves primarily as a food animal disease referral clinic and teaching center where veterinary students from Washington State University (Oregon dropped out of the Program in 2005) participate during their senior year in one or more two- to four-week elective block rotations in food animal surgery and production medicine.

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At this time, the WOI (WI) Program annually provides 44 Idaho resident students with access to a veterinary medical education through this cooperative agreement. On average, 65-75% of new Idaho resident graduates of the WI Program are licensed to practice veterinary medicine in Idaho annually.

Responsibility for the Caine Center programs, daily operations, supervision and leadership for the faculty and staff lies with a WI Program Coordinator who functions as a Unit Administrator under the administrative supervision of the Head of the AVS Department. Tied closely to the food animal surgery and production medicine teaching program is the Caine Center's service and diagnostic program providing service to producers and veterinarians throughout Idaho.

Teaching:

The success of the Caine Center's highly-rated and effective veterinary medicine teaching program has been largely due to providing a practical, hands-on approach to clinical problem solving. Nine food animal blocks are offered: 1) General Food Animal Medicine for students interested in a mixed-animal practice providing clinical skills, individual animal medicine, and herd health; 2) Dairy Production Medicine, 3) Bovine Reproduction/Biotechnology, 4) Cow/Calf Production, 5) Beef Cow Calving Management, 6) Feedlot Medicine, 7) Sheep/Lambing Management, 8) Small Ruminant Clinical Medicine and, 9) Special Topics Project.

The Caine Center also provides summer internship opportunities that are specially designed for UI/AVS Department pre-veterinary students. An on-campus WI faculty member serves as an advisor for pre-veterinary students, and also teaches in the UI/AVS Department and in the second- and third-year instructional programs at the Washington State University College of Veterinary Medicine at Pullman.

Research:

Research currently underway by Caine Center faculty includes Johne's disease in cattle, sheep, and goats, scrapie in sheep, vaccination efficacy in calves, and collaboration with the Idaho Department of Fish & Game on wildlife/domestic disease interaction.

Service/Outreach/Extension:

Caine Center faculty members are heavily involved in outreach activities carried out through daily/regular interaction and consultation with livestock producers, commodity groups, veterinarians, UI Extension specialists, and others on a variety of topics including: production medicine, disease control or prevention, animal welfare, and reproductive problems. Faculty members also contribute material on a regular basis to lay publications and industry newsletters, and are active in their state and national professional associations as well as commodity and industry groups.

Goal I: *Continue to provide and improve a quality, highly-rated and effective teaching program with an innovative and practical approach to clinical problem-solving.*

Objectives:

1. Encourage and support continuing education for faculty to keep abreast of new knowledge and innovations in their fields of expertise.
 - *Performance Measure:* Number of faculty participating in continuing education training.
 - *Benchmark:* Each faculty member will participate in at least one National Veterinary Meeting per year.

2. Explore new teaching methods by incorporating new material into existing blocks or by developing new, pertinent specialty medicine and management blocks combined with field experiences to enhance students' expertise and confidence.
 - *Performance Measure:* Percentage of new teaching material incorporated into teaching material per year.
 - *Benchmark:* New material and/or methods equaling not less than 7% per year.

3. Expand partnerships with industry, state and local government agencies, and private foundations to encourage the funding of unique learning opportunities such as internships, preceptorships and residencies.
 - *Performance Measure:* Number of learning opportunities such as internships, preceptorships and residencies.
 - *Benchmark:* At least one new learning opportunity incorporated into Program every third year.

4. Continue active solicitation of live animal referral cases from veterinarians in order to maintain an adequately large animal caseload to provide professional veterinary students with teaching resources and expand their clinical experiences in Production Animal Medicine.
 - *Performance Measure:* Number of live animal cases seen per year.
 - *Benchmark:* Live animal cases seen per year to remain level or to increase.

5. Pursue opportunities for contracts/agreements with veterinary schools outside the WOI (WI) Program to provide food animal medicine teaching experiences at the

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Caine Center for their senior veterinary students, and an additional revenue source for the Caine Center.

- *Performance Measure:* Number of students participating in Program from outside schools.
- *Benchmark:* Two students per year from other Veterinary Schools.

6. Continue communication and interaction with the WSU Veterinary School clinical medicine administration and faculty to identify students and areas of food animal production medicine training that would be enhanced by providing those opportunities at the Caine Center.

- *Performance Measure:* Percentage of WSU students enrolled in Caine block rotations
- *Benchmark:* Participation in at least 80% of our available 65 student blocks (52 students per year).

Goal II: Provide the atmosphere, environment, encouragement, and time for faculty members to allow them to cultivate and nurture their scholarly and creative abilities.

Objectives:

1. Mentor, nurture, and encourage new faculty to ensure they have opportunity for collaboration on research projects with senior faculty, to apply for grants and contracts from various sources, and that they are progressing in an organized fashion towards reaching their research goals.

- *Performance Measure:* Publish research papers or abstracts, number of presentations given, amount of external funding, papers published.
- *Benchmark:* Publish two research papers/year (based on a 100% research appointment) in peer-reviewed journals, meeting CALS annual evaluation performance goals for each faculty member.

2. Partner with faculty and staff from other disciplines or agencies to focus the research expertise and limited resources of the Caine Center faculty to selected issues.

- *Performance Measure:* Secure significant research projects with participation by two or more faculty or staff.
- *Benchmark:* Maintain one or two collaborative projects/year.

Goal III: Provide continuing educating opportunities for producers, youth groups, and industry through outreach programs.

Objectives:

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1. Continue to seek more opportunities for educating producers, youth groups, and others on improving agricultural animal production by the use of better nutrition, good management practices, and preventative medicine.

- *Performance measure:* Number of outreach efforts made by faculty and staff per year.
- *Benchmark:* At least one outreach meeting conducted per faculty member per year.

2. Facilitate more field investigation activities by enhancing ability to respond to requests in outlying areas of the state and continued collaboration and consulting with the University of Idaho Extension System and other University departments providing animal health expertise when needed or requested.

- *Performance Measure:* Number of field investigations conducted per year.
- *Benchmark:* Increase field investigations over the previous year.

3. Sponsor clinical symposia including wet labs demonstrating special techniques for veterinarians and specialists, participate in local and state association annual meetings, and sponsor speakers for local or state meetings.

- *Performance Measure:* Number of clinical symposia conducted per year.
- *Benchmark:* One clinical symposium every other year per faculty member.

- *Performance Measure:* Number of local or state association meetings attended per year.
- *Benchmark:* One local and one State meeting attended by at least two faculty members per year.

- *Performance Measure:* Number of talks given locally or statewide per year.
- *Benchmark:* One local talk given by each faculty member per year.

Goal IV: Enhance and expand diagnostic laboratory and field services for the veterinarians and livestock producers in Idaho and the region.

Objectives:

1. Continued updating of clinical and laboratory instrumentation as budgets allows to reduce cost, enhance and expand diagnostic laboratory testing procedures and services for veterinarians and livestock producers in the region.

- *Performance Measure:* Number of diagnostic samples processed annually by the Clinical Pathology, Bacteriology, Virology, and Histology Laboratories.
- *Benchmark:* A 5% increase in laboratory accessions per year.

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2. Partner with other University departments or units and state agencies to enhance services, hire needed expertise, improve quality and expand diagnostic testing for zoonotic and communicable diseases of importance to Idaho and the Northwest region.

- *Performance Measure:* Hiring of new professional personnel in conjunction with other departments or agencies to enhance laboratory capability.
- *Benchmark:* Within two years recruit and hire a Veterinary Pathologist, in conjunction with the State Department of Agriculture.

Goal V: Sustain and enhance an energized and productive work environment that is adaptable, dynamic, and vital, enabling the Caine Center to advance strategically and function efficiently within the organization and structure of the AVS Department.

Objectives:

1. Continue to encourage and foster relationships that allow for open communications about difficult issues and diversity among employees by developing a socially healthy and welcoming environment characterized by trust and respect.

- *Performance Measure:* Enable regularly scheduled meeting times for interaction by faculty/staff, teams or workgroups.
- *Benchmark:* Monthly general staff meetings with opportunity for input by individuals as well as team reports and updates.

2. Continue to ensure that the Caine Center is maintained as a safe workplace for employees and students through proper training and monitoring.

- *Performance Measure:* Conduct program and safety orientations for faculty, staff and students.
- *Benchmark:* Document that each student in rotations and all new employees receive initial orientation; organize and conduct safety training as appropriate.

3. Align employees' position descriptions with their actual job duties, and document performance as a basis for annual pay adjustments.

- *Performance Measure:* Up-to-date position descriptions for board-appointed and temporary help positions; annual review of performance for each employee.
- *Benchmark:* Conduct annual performance review of each employee, including revision of position descriptions as necessary.

4. Provide opportunities for and encourage personal and professional growth through participation in health and wellness, and continuing education opportunities.

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- *Performance Measure:* University-sponsored or department-funded development opportunities for faculty and staff.
- *Benchmark:* Achieve a minimum of 50% of employees annually participating in continuing education and enrichment opportunities.

Key External Factors:

1. Funding:

- Salaries.
 - Limited ability to attract qualified faculty and staff due to salaries less than other regional public universities, resulting in unfilled positions. This, in turn, causes undue burdens on remaining faculty and staff to execute the Center's mission, and limits faculty's time for research activities.
 - Annual raises and promotions depend on legislative appropriations, which are often meager. Supervisors are usually unable to reward their employees financially for excellent performance and personnel leave for better paying jobs.
- External funding limitations.
 - Inadequate or limited start-up funds for new faculty members' research.
 - Less availability of extramural funding for animal disease research.
- Capital outlay funding is limited or often unavailable, and new instrumentation is very expensive.

2. Employee Benefits:

- Health care costs have increased and benefits have been reduced, which has a negative impact on employees and undermines morale.

3. Other Factors:

- Fewer students nationwide are interested in food animal medicine which makes it difficult to increase student numbers.
- Livestock markets fluctuate, causing clientele base to fluctuate.
- Allied industries are less able to support food animal-related research and field activities in times of economic downturns.



WWAMI

WWAMI is Idaho's regional medical education program, under the leadership and institutional mission of the **University of Idaho**, in partnership with the **University of Washington School of Medicine (UWSOM)**. Idaho medical students spend the first year of their medical education on the campus of the **University of Idaho** in Moscow, study medicine on the campus of UWSOM in Seattle during their second year, and complete their third and fourth year clinical training at **regional medical sites in Boise, across Idaho**, or throughout the **WWAMI** (Washington, Wyoming, Alaska, Montana, Idaho) region.

As the **medical education contract program for the State of Idaho** with the University of Washington, the **UI-WWAMI Medical Program** supports the Strategic Action Plan of its host university, the University of Idaho, while recognizing its obligation to the mission, goals, and objectives of its nationally accredited partner program, the UWSOM.

UWSOM and its partner WWAMI Medical Program in Idaho are dedicated to improving the general health and wellbeing of the public. In pursuit of our goals, we are committed to **excellence in biomedical education, research, and health care**. The UWSOM

and WWAMI are also dedicated to ethical conduct in all of our activities. As the **pre-eminent academic medical center in our region** and as a national leader in biomedical research, UWSOM places special emphasis on educating and training physicians, scientists, and allied health professionals **dedicated to two distinct missions:**

- **Meeting the health care and workforce needs of our region**, especially by recognizing the importance of **primary care** and providing service to **underserved populations;**
- **Advancing knowledge** and assuming leadership in the **biomedical sciences and in academic medicine.**

We acknowledge a **special responsibility to the people** in the states of Washington, Wyoming, Alaska, Montana, and **Idaho**, who have joined in a unique regional partnership. UWSOM and WWAMI are **committed to building and sustaining a diverse academic community** of faculty, staff, fellows, residents, and students and **to assuring that access to education and training** is open to learners from all segments of society, acknowledging a **particular responsibility to the diverse populations within our region.**

UWSOM – Idaho WWAMI Medical Student Education Mission Statement

Our mission is to improve the health and wellbeing of people and communities throughout the WWAMI region, the nation, and the world through educating, training, and mentoring our students to be excellent physicians.

Vision for Medical Student Education

Our students will be highly competent, knowledgeable, caring, culturally sensitive, ethical, dedicated to service, and engaged in lifelong learning.

Goals for Medical Student Education

In support of our mission to educate physicians, our goals for medical student training are to:

1. Challenge students and faculty to achieve excellence;

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2. Maintain a learner-centered curriculum that focuses on patient-centered care and that is innovative and responsive to changes in medical practice and healthcare needs;
3. Provide students with a strong foundation in science and medicine that prepares them for diverse roles and careers;
4. Advance patient care and improve health through discovery and application of new knowledge;
5. Teach, model, and promote:
 - a. the highest standards of professionalism, honor, and integrity, treating others with empathy, compassion, and respect;
 - b. a team approach to the practice of medicine, including individual responsibility and accountability, with respect for the contributions of all health professions and medical specialties;
 - c. the skills necessary to provide quality care in a culturally sensitive and linguistically appropriate manner;
6. Encourage students to maintain and model a balanced and healthy lifestyle;
7. Foster dedication to service, including caring for the underserved;
8. Engage students in healthcare delivery, public health, and research to strengthen their understanding of healthcare disparities and regional and global health issues; and
9. Provide leadership in medical education, research, and health policy for the benefit of those we serve regionally, nationally, and globally.

Alignment with the Idaho State Board of Education Strategic Plan
2009-2013

Goal I: Quality – Sustain and continuously improve the quality of medical education, training, research, and service.

Objective: Provide excellent first year medical education in biomedical and clinical sciences.

- *Performance measure:* pass rate on the U.S. Medical Licensing Examination, Step 1, taken during 2nd year of medical training.
- *Benchmark:* U.S. medical student pass rate.

Goal II: Access – Continuously improve access to medical education for individuals of diverse backgrounds, particularly the underserved in medicine.

Objective: Provide outreach activities that help recruit a strong medical student applicant pool for Idaho WWAMI.

- *Performance measure:* the number of Idaho WWAMI medical school applicants per year and the ratio of Idaho applicants per funded medical student seat.
- *Benchmark:* National ratio of state applicants to medical school per state-support seat.

Goal III: Efficiency and Outcomes – Deliver medical education, training, research, and service in a manner which makes efficient use of resources and contributes to the successful completion of our medical education program goals for Idaho.

Objective 1: Increase medical student interest in rural and primary care practice in Idaho.

- *Performance measure:* the number of WWAMI rural summer training placements in Idaho each year.
- *Benchmark:* 50% of class interested in rural training experiences following first year of medical education.

Objective 2: Maintain interest in primary care medicine for medical career choice.

- *Performance measure:* Percent of Idaho WWAMI graduates choosing primary care specialties for residency training each year.
- *Benchmark:* 50% of Idaho WWAMI graduating class chooses primary care residency training, in keeping with WWAMI mission.

Objective 3: Maintain a high rate of return for Idaho WWAMI graduate physicians who choose to practice medicine in Idaho, equal to or better than the national state return rate.

- *Performance measure:* Cumulative Idaho WWAMI return rate for graduates who practice medicine in Idaho.
- *Benchmark:* target rate – national average or better.

Objective 4: Maintain a high level Return on Investment (ROI) for all WWAMI graduates who return to practice medicine in Idaho.

- *Performance measure:* Ratio of any WWAMI graduates who return to practice medicine in Idaho, regardless of WWAMI origin, divided by the total number of Idaho medical student seats funded by the State.
- *Benchmark:* target ratio – 60%

Key External Factors (beyond the control of the Idaho WWAMI Medical Program):

Funding: the number of state-supported Idaho medical student seats each year is tied to State legislative appropriations. Availability of revenues and competing funding priorities may vary each year.

Medical Education Partnerships: as a distributed medical education model, the University of Idaho and the UWSOM WWAMI Medical Program rely on medical education partnership with local and regional physicians, clinics, hospitals, and other educational institutions in the delivery of medical training in Idaho. The availability of these groups to participate in a distributed model of medical education varies according to their own budget resources and competing demands on their time and staff each year.

Population Changes in Idaho: with a growing population and an aging physician workforce, the needs for doctors and medical education for Idaho's students only increases. Changes in population statistics in Idaho may affect applicant numbers to medical school, clinical care demands in local communities and hospitals, and availability of training physicians from year to year.

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AGRICULTURAL RESEARCH & EXTENSION SYSTEM

STRATEGIC PLAN

2009-2013

THE AGRICULTURAL RESEARCH & EXTENSION SYSTEM STRATEGIC PLAN 2009-2013

The Agricultural Research and Extension System (ARES) is part of the Land-Grant system established by the Morrill Act of 1862. The University of Idaho Cooperative Extension System, established in 1915 under the Smith-Lever Act of 1914, conducts educational outreach programs to improve the quality of life for Idaho citizens through educating by helping them apply the latest scientific technology to their communities, businesses, lives and families. The Idaho Agricultural Experiment Station, established in 1892 under the Hatch Act of 1887, conducts fundamental and applied research to solve problems and meet needs in Idaho's agriculture, natural resources, youth and family and related areas.

VISION STATEMENT

As a dynamic and responsive knowledge organization serving needs in agriculture, natural resources, the environment, families, consumers, youth and communities, we will integrate the functions of research and extension in an environment of academic excellence that addresses:

- the needs for lifelong learning through innovative programs,
- creative solutions to needs in Idaho through a research system that generates and applies knowledge, and
- an extension system that extends this knowledge to Idaho citizens for use in problem solving at a time and place of their convenience.

MISSION STATEMENT

The Agricultural Research & Extension System's mission is to support economic growth and enhance the quality of life for the people of Idaho by:

- preparing students to be innovative leaders in a global society,
- helping people improve their lives through research-based education and leadership development focused on issues and needs, and
- providing new knowledge to support agriculture and enhance the understanding of natural and human resources.

Goal 1 – Teaching and Learning: Engage students in a transformational experience of discovery, understanding, and global citizenship.

Objective A: Attract and retain the appropriate number of diverse, high quality undergraduate and graduate students.

Performance Measure: The number and diversity of students enrolled in College of Agricultural and Life Sciences' academic programs.

Benchmark: A significant yearly increase in overall enrollment and diversity of enrollment.

Objective B: Use innovative curricula and technology to develop skills for life-long learning and produce globally engaged graduates.

Performance Measure: A broad audience of learners will acquire knowledge and skills appropriate to global awareness through means of cutting-edge technology.

Benchmark: Number of new courses developed and delivered to both traditional and non-traditional learners via non-traditional means.

Objective C: Assess learning outcomes to demonstrate effectiveness and improve our programs.

Performance Measure: Develop and implement methods to independently evaluate and improve student learning.

Benchmark: Implementation of evaluation method and documentation of result.

Goal 2 – Scholarly and Creative Activity: Achieve excellence in scholarship and creative activity through an institutional culture that values and promotes strong academic areas and interdisciplinary collaboration among them.

Objective A: Promote outstanding, influential research in discovery and application/integration that is competitive with peer institutions.

Performance Measure: Increased level of grants awarded for scientific discovery, application/integration.

Benchmark: Increased number of licenses and patents.

Objective B: Provide undergraduates with opportunities to participate in scholarly and creative activity.

Performance Measure: Students will participate in a variety of learning experiences that produce a scholarly product or notable impact to their overall UI education.

Benchmark: Mechanisms for engaging students in scholarly and creative activity will be developed by Fall 2009.

Objective C: Address the needs of stakeholders by conducting research with regional, national and international impact and recognition.

Performance Measure: Develop nationally recognized research programs that meet the identified needs of stakeholders/clientele.

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Benchmark: Number of scholarly products and programs delivered addressing identified stakeholder needs.

Goal 3 – Outreach and Engagement: Engage with the public, private and non-profit sectors through mutually beneficial partnerships that enhance teaching, learning, discovery, and creativity.

Objective A: Provide research-based education that anticipates and responds to high priority stakeholder needs.

Performance Measure: Faculty will engage stakeholders in a variety of experiential and traditional learning opportunities that meet their educational and informational needs.

Benchmark: Develop an assessment tool that provides faculty with reliable information regarding stakeholder needs by Fall 2010.

Objective B: Integrate teaching, research and extension using interdisciplinary teams to solve economic, environmental and social problems.

Performance Measure: Funding support for interdisciplinary faculty positions.

Benchmark: Number of interdisciplinary faculty positions among colleges.

Objective C: Address the needs of Idaho's changing population including underserved audiences.

Performance Measure: Development of programs that address the changing demographics and population needs of Idaho stakeholders.

Benchmark: Develop an assessment tool that provides faculty with reliable information regarding stakeholder needs.

Objective D: Maintain a strong statewide presence by strategically locating personnel and resources.

Performance Measure: Place personnel and allocate resources in alignment with the College of Agricultural and Life Sciences strategic plan to meet the highest priority needs.

Benchmark: Number of college personnel located at Agricultural Research and Extension Centers throughout the state.

Objective E: Engage students in addressing community based needs using Extension.

Performance Measure: Provide creative and innovative opportunity for students to engage in community based learning experiences of mutual benefit.

Benchmark: A methodology will be developed for engaging students in community based, experiential learning opportunities by Fall 2009.

Goal 4 – Organization, Culture and Climate: Create and sustain an energized community that is adaptable, dynamic, and vital to enable the University to advance strategically and function efficiently.

Objective A: Attract and retain highly qualified, diverse faculty, staff and students.

Performance Measure: Advertise for open positions in areas where we will attract a diverse faculty and staff.

Benchmark: Increased level of diversity within the ranks of College of Agricultural and Life Sciences faculty, staff and administration.

Objective B: Demonstrate fairness in expectation, evaluation and compensation.

Performance Measure: Develop clear performance guidelines for faculty and staff.

Benchmark: College units will clearly document expectations of performance based on rank and position descriptions.

Objective C: Create and support an atmosphere of loyalty, trust, collegiality and inclusiveness.

Performance Measure: Quality of the work environment within College of Agricultural and Life Sciences will be measured by implementing a college-wide survey by Fall 2009.

Benchmark: Survey results will provide a baseline data against which quality of the work environment will be periodically measured.

Objective D: Reduce academic, institutional and administrative barriers to achieve an efficient and creative workplace.

Performance Measure: Develop a taskforce to review current processes and procedures.

Benchmark: Taskforce makes recommendations to the college Dean by Spring 2010.

Key External Factors

Funding:

Economic conditions will continue to impact the success of our strategic plan. Ongoing and adequate levels of funding from both state and federal sources will be critical to our success.

New Leadership:

Achievement of our strategic plan will require understanding and support from the University of Idaho's leadership. Continued changes in leadership positions and strategic planning efforts will greatly influence our ability to meet stakeholder needs.

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Forest Utilization Research and Outreach (FUR)

2009

STRATEGIC PLAN

Forest Utilization Research and Outreach

Mission Statement

The effect of the Forest Utilization Research and Outreach (FUR) program is to increase the productivity of Idaho's forest lands by conceiving, analyzing, and developing methodologies that improve intensive forest harvesting practices, improve and increase wood use and wood residue utilization technologies, improve forest regeneration, forest and rangeland restoration, and nursery management practices, demonstrate state-of-the-art scientifically, socially and environmentally sound forest and range nursery, regeneration, and management practices, provide through the Policy Analysis Group unbiased factual and timely information on natural resources issues facing Idaho's decision makers.

FUR is located in the College of Natural Resources at The University of Idaho, which is an internationally recognized land-grant research institution combining research, outreach, graduate, and professional education with a strong undergraduate base in the liberal arts.

VISION STATEMENT

Our scholarly and creative activity generates knowledge that strengthens the scientific, economic, cultural, social, and legal foundations of an open, diverse, and democratic society. Our outreach and engagement facilitates the development of prosperous and environmentally sound communities and industries. Our learning activities are integrated with FUR research and seek to engage every student in a transformative journey of discovery and understanding.

Our work is shaped by a passion for knowledge, innovation and creativity, by the rigor of high academic and ethical standards, by the attainment of each individual's full human potential, by the enrichment generated through diversity, and by the dissolution of cultural and organizational barriers. We are committed to improving our community, the communities we serve, and the facilities necessary for us to fulfill our vision and mission.

We emphasize quality and access, focusing our efforts on sustaining strong programs and investing resources in strategic directions that advance the interests of Idaho in an increasingly interdependent and competitive world. Through collaboration across strong academic disciplines, and through the creation of public, private, and community partnerships, we undertake bold initiatives to promote science, technology, and their applications; to catalyze entrepreneurial innovation; to steward the natural environment;

and to develop the design, lifestyles and civic infrastructures of sustainable communities.

Forest Utilization Research and Outreach (FUR)

GOALS & OBJECTIVES

Goal 1: Scholarship and Creativity

Achieve excellence in scholarship and creative activity through an institutional culture that values and promotes strong academic areas and interdisciplinary collaboration among them.

Objective A: Promote an environment that increases faculty engagement in interdisciplinary scholarship.

Strategies:

1. Use hiring to strengthen interdisciplinary scholarship that advances the college's strategic themes and land-grant mission.
2. Establish, renew, remodel, and reallocate facilities to encourage collaborative interdisciplinary inquiry and provide access to information resources and innovative technologies.

Performance Measures:

Number of CNR faculty involved in interdisciplinary scholarship.

Laboratories and field facilities that support CNR interdisciplinary inquiry.

Benchmarks:

Number of faculty and number of facilities meet targets set for interdisciplinary Forest Utilization Research in CNR

Objective B: Emphasize scholarly and creative activities that support the college's strategic themes, the research-extensive and land-grant missions, and strategically important graduate and professional programs.

Strategies:

1. Enhance scholarly modes of discovery, application and integration that address issues of importance to the citizens of Idaho that improve forest and rangeland regeneration, nursery management practices, and forest and rangeland productivity.
2. Build strategic research and technological transfer activities statewide and regionally through unbiased analyses of the Policy Analysis Group.

Performance Measure:

Services provided by CNR for statewide FUR stakeholders

Benchmark:

Number of service events and total participants in CNR events provided for FUR stakeholders.

Goal 2: Outreach and Engagement

Engage with the public, private and non-profit sectors through mutually beneficial partnerships that enhance teaching, learning, discovery, and creativity.

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Objective A: Build upon, strengthen, and connect the College of Natural Resources with other parts of the University to engage in mutually beneficial partnerships with stakeholders.

Strategies:

1. Grow the capacity of the College of Natural Resources to engage with communities by involving faculty and students in programs relevant to local and regional issues.
2. Engage with communities and organizations through flexible partnerships that share resources and respond to local needs and expectations.
3. Foster key industry/business relationships that benefit entrepreneurship and social and economic development through innovation and technology transfer that will increase the productivity of Idaho's forests, rangelands, and waterways.

Performance Measure:

Cases served: examples include: communities served; workshops/tours conducted; FUR stakeholder attendees; invited presentations; research, teaching and service projects; research studies completed/published; private landowners assisted and seedling research projects.

Benchmark:

Meeting target numbers for examples above.

Goal 3: Teaching and Learning

Engage students in a transformational experience of discovery, understanding, and global citizenship.

Objective A: Develop effective integrative learning activities to engage and expand student minds.

Strategies:

1. Provide undergraduate, graduate and professional students with education and research opportunities in nursery management, wood utilization technologies and forest and rangeland regeneration and restoration.
2. Integrate educational experiences into research programs at CNR outdoor laboratories, including the college Experimental Forest, the Forest Nursery complex, and McCall campus.
3. Engage alumni and stakeholders as partners in research, learning, and outreach.

Performance Measures:

FUR learning and research opportunities integrated into undergraduate, graduate and professional student programs in CNR on the Moscow campus and in CNR off-campus sites. Engagement of alumni and other stakeholders in FUR learning, research and outreach activities.

Benchmark:

Meeting target numbers for activities proposed above.



Idaho Geological Survey (IGS)

***2009-2013
STRATEGIC PLAN***

Idaho Geological Survey

VISION STATEMENT

The Idaho Geological Survey vision is to provide the state with the best geologic information possible through strong and competitive applied research, effective program accomplishments, and transparent access. We are committed to the advancement of the science and emphasize the practical application of geology to benefit society. We seek to accomplish our responsibilities through *service and outreach, research, and education* activities.

MISSION STATEMENT

The Idaho Geological Survey is the lead state agency for the collection, interpretation, and dissemination of geologic and mineral data for Idaho. The agency has served the state since 1919 and prior to 1984 was named the Idaho Bureau of Mines and Geology.

Members of the Idaho Geological Survey staff acquire geologic information through field and laboratory investigations and through cooperative programs with other governmental and private agencies. The Idaho Geological Survey's geologic mapping program is the primary applied research function of the agency. The Survey's Digital Mapping Laboratory is central to compiling, producing, and delivering new digital geologic maps. Other main Idaho Geological Survey programs include geologic hazards, hydrology, mining, mine safety training, abandoned and inactive mines inventory, and earth science education outreach. As Idaho grows, demand is increasing for geologic information related to population growth, energy- mineral- and water-resource development, landslide hazards and earthquake monitoring.

AUTHORITY

Idaho Code provides for the creation, purpose, duties, reporting, offices, and advisory board of the Idaho Geological Survey. The Code specifies the authority to conduct investigations and establish cooperative projects and seek research funding. The Idaho Geological Survey publishes an Annual Report as required by its enabling act.

Service and Outreach

Goal 1: Achieve excellence in collecting and disseminating geologic information and mineral data to the mining, energy, agriculture, utility, construction, insurance, and banking industries, educational institutions, civic and professional organizations, elected officials, governmental agencies, and the public. Continue to strive for increased efficiency and access to Survey information primarily through publications, Web site products, in-house collections and customer inquiries. Emphasize Web site delivery of

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digital products and compliance with new revision of state documents requirements (Idaho Code 33-2505).

Objective 1: Develop and publish survey documents

Performance Measure: Number of Published Reports on
Geology/Hydrology/Hazards/Mineral Resources

Benchmark: The number of published reports will be equal to or greater than the preceding year.

Objective 2: Build and deliver Web site products

Performance Measure: Number of Web site Products Used

Benchmark: The number of Website products used will be equal to or greater than the preceding year

Objective 3: Sustain Idaho State Documents Depository Program and Georef Catalog (International)

Performance Measure: Percentage of total Survey documents available

Benchmark: 100%

Research

Goal 2: Promote, foster, and sustain a climate for research excellence. Develop existing competitive strengths in geological expertise. Maintain national level recognition and research competitiveness in digital geological mapping techniques. Sustain and build a strong research program through interdisciplinary collaboration with academic institutions, and state and federal land management agencies.

Objective 1: Sustain and enhance geological mapping and related studies

Performance Measure: Increase the geologic map coverage of Idaho by mapping in priority areas designated by Idaho Geological Mapping Advisory Committee (square miles).

Benchmark: Increase in cumulative percent of Idaho's area covered by modern geologic mapping.

Objective 2: Sustain and build research funding

Performance Measure: Externally funded grant and contract dollars

Benchmark: The number of externally funded grant and contract dollars compared to five year average.

Education

Goal 3: Support knowledge and understanding of Idaho's geologic setting and resources through earth science education. Achieve excellence in scholarly and creative activities through collaboration and building partnerships that enhance teaching, discovery, and lifelong learning.

Objective 1: Develop and deliver earth science education programs and public presentations

Performance Measure: Educational programs for public audiences

Benchmark: The number of educational presentations will be equal to or greater than the previous year.

Key External Factors:

Funding:

Achievement of strategic goals and objectives is dependent on appropriate state funding.

External research support is mostly subject to federal program funding and increasing state competition for federal programs. Because most federal programs require a state match the capability to match grants depends on state funds.

Demand for services and products:

Changes in demand for geologic information due to energy and minerals economics play an important role in achievement of strategic goals and objectives. State population growth and requirements for geologic information by public decision makers and land managers are also key external factors.



SELECTED GOALS FROM STRATEGIC PLAN FOR 2008-2013
THAT SUPPORT STATE STRATEGIC PLAN

Mission:

North Idaho College is committed to student success, teaching excellence, and lifelong learning. As a comprehensive community college, North Idaho College provides quality educational opportunities that expand human potential and enhance the quality of life for the students and the communities it serves.

THEME I: PROGRAMS

Goal 1: Improve and expand educational opportunities, programs, and courses for the student population and community

Objectives:

- A. Expand program offerings, and accelerate the implementation of new professional-technical and workforce training at NIC that meet the needs of students, business, and industry

Performance Measure: Increase program offerings as outlined in 8-Year Plan submitted to SBOE.

Benchmark: Expanded program offerings will meet or exceed last year.

- B. Continue existing and develop new transfer opportunities with four-year institutions that meet the needs of students and employers

Performance Measure: Increase program offerings as outlined in 8-Year Plan submitted to SBOE.

Benchmark: Number of new transfer opportunities will meet or exceed last year.

Goal 2: Expand and improve alternative delivery of education

Objectives:

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- A. Expand course offerings at the NIC Outreach Centers and other off-campus sites

Performance Measure: Increase number of students in courses offered at outreach centers by 10% each year.

Benchmark: Number of new transfer opportunities will meet or exceed last year.

Goal 3: Develop and expand opportunities for high school students enrolled through NIC, emphasizing professional technical and dual credit/enrollment programs

Objectives:

- A. Develop an expanded schedule of dual credit courses

Performance Measure: Increase number of students in courses offered on campus and in area high schools by 10% each year.

Benchmark: Number of new dual credit courses will meet or exceed last year.

THEME II: STUDENT SUPPORT

Goal 4: Improve student access

Objectives:

- A. Develop a system to assist potential students with financial planning for costs associated with attending NIC

Performance Measure: Identify possible resources or systems for prospective students to use when considering college cost.

Benchmark: Number of students assisted will meet or exceed last year.

THEME IV: FINANCE AND FUNDING

Goal 5: Align budget with strategic plan

Objectives:

- A. Document how the budget addresses the priorities of the strategic plan

Performance Measure: Report alignment of major budget expenditures with major strategic goals

Benchmark: Two major goals will be aligned with budget resources annually.

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External Factors: Factors that are beyond the control of the college that affect the achievement of goals

1. Enrollment Growth

Enrollment growth can be uncertain and impacts legislative allocation

2. Revenue – Property Taxes

Availability of local property taxes can be uncertain.

3. Revenue – Legislative Allocation

Availability of state revenues for appropriation can be uncertain.

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Eastern Idaho Technical College Strategic Plan 2009-2013

Vision

Our vision is to be a superior quality professional-technical college. We value a dynamic environment as a foundation for building our College into a nationally recognized technical education role model. We are committed to educating all students through progressive and proven educational philosophies. We will continue to provide high quality education and state-of-the-art facilities and equipment for our students. We seek to achieve a comprehensive curriculum that prepares our students for entering the workforce, articulation to any college, and full participation in society. We acknowledge the nature of change, the need for growth, and the potential of all challenges.

Mission

Eastern Idaho Technical College provides superior educational services in a positive learning environment that supports student success and regional workforce needs.

GOAL I: Implement a comprehensive marketing campaign to promote college access and highlight Eastern Idaho Technical College offerings.

Objectives:

1. Monitor the labor market needs in the college service area and develop new programs, considering available resources, which serve the identified needs.
 - **Performance Measure:**
 - Number of new programs created in response to labor market needs.
 - **Benchmark:**
 - Number of new programs created in response to labor market needs will meet or exceed last year.
2. Develop new workforce training program initiatives by working with local and regional business, industry, and economic development organizations.
 - **Performance Measure:**
 - Number of new programs created.
 - **Benchmark:**
 - Number of new programs created will meet or exceed last year.
3. Work with Idaho National Laboratory training program personnel to expand course offerings.
 - **Performance Measure:**
 - Number of training courses offered.
 - **Benchmark:**
 - Design, develop, and implement three new occupational upgrade training courses by the conclusion of FY2009.

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4. Strengthen and enhance the operation of the Summer Wildland Fire Program, Ready Reserve, Idaho Fire Academy, and PTE Emergency Services training on an ongoing basis.
 - **Performance Measure:**
 - Percentage complete of annual program course schedule.
 - **Benchmark:**
 - Completion of an annual program course schedule, and delivery of program during the spring and summer of fiscal year 2009.
5. Develop and implement a comprehensive marketing plan to promote the college and improve public perception of the college.
 - **Performance Measure:**
 - Percent completed and implemented.
 - **Benchmark:**
 - Marketing plan will be fully implemented in FY2010.
6. Develop and produce new printed marketing materials that can be distributed throughout the entire nine-county service region.
 - **Performance Measure:**
 - Number of service regions receiving marketing materials.
 - **Benchmark:**
 - Two service regions per year will receive marketing materials.

GOAL II: Improve and enhance internal and external communication.

Objectives:

1. Strengthen and enhance the coordination and monitoring of the Idaho National Laboratory (INL) ES&H contract.
 - **Performance Measure:**
 - Number of complaints from INL regarding availability of courses.
 - **Benchmark:**
 - Zero complaints from INL on the availability of courses.
2. The Workforce Training Program will implement the Colleague database to align program recordkeeping with all student functions.
 - **Performance Measure:**
 - Number of WFT students able to register online.
 - **Benchmark:**
 - WFT students able to register online by the conclusion of FY2009.
3. Strengthen and enhance the operation of the Summer Wildland Fire Program, Ready Reserve, Idaho Fire Academy, and PTE Emergency Services training on an ongoing basis.
 - **Performance Measure:**
 - Percentage completed of annual program course schedule, and delivery of program.
 - **Benchmark:**
 - Completion annual program course schedule and delivery of program during the spring and summer of fiscal year 2009.
4. Integrate the institutional research office to formalize the collection, analysis, and reporting of data to support evaluation, planning, and decision making. NWCCU Recommendation #5.
 - **Performance Measure:**

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- 100% compliance with state and federal requirements and guidelines.
 - Inclusion in at least 80% of appropriate discussions.
 - **Benchmark:**
 - Integrated campus IR function supportive of institutional goals.
5. Develop a system to include faculty and staff views in the system of college governance. NWCCU Recommendation #6.
- **Performance Measure:**
 - By survey, 80% satisfaction that suggestions and views are being considered.
 - **Benchmark:**
 - Functional system of collaborative governance.

GOAL III: Expand program offerings, within available college resources, based upon local labor market demand and compliance with the State Board of Education's Eight-Year Plan for Program Expansion.

Objectives:

1. Investigate the feasibility of allowing students to take live video conference classes from their home.
 - **Performance Measure:**
 - 90% successful connection to test class from various locations.
 - Identification of minimum band width requirements.
 - **Benchmark:**
 - Completion of a feasibility study and recommendation to PAC.
2. Improve direct communication via a wireless bridge at IF EITC Campus for IP video classes for outreach sites (Driggs, Rexburg, Arco, and Salmon).
 - **Performance Measure:**
 - 50% reduction in packet loss and elimination of connectivity time-outs.
 - **Benchmark:**
 - Increased reliability and quality over previous connection.

GOAL IV: Identify and publish intended learning outcomes for each degree and certificate program at the college and through regular and systematic assessment demonstrate that completers achieve those outcomes.

Objectives:

1. Develop and publish expected learning outcomes for each degree and certificate program. NWCCU Recommendation #1
 - **Performance Measure:**
 - List of essential skills completed and sorted.
 - List of outcomes for each program.
 - Program map for each program on file.
 - **Benchmark:**

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- Process for implementation and regular review of expected learning outcomes by degree and certificate program.
- 2. The ABE program will adopt the new CASAS (State ABE approved NRS ESL assessment) series and incorporate the listening test in an effort to better capture indication of student learning and performance outcomes.
 - **Performance Measure:**
 - After comparing FY07 NRS performance data, to FY08, interpret and adjust program as necessary.
 - **Benchmark:**
 - Improved NRS (National Reporting System) outcome performance.
- 3. The ABE program will develop a survey to identify why or why not students stay in the program.
 - **Performance Measure:**
 - Ongoing assessment of student satisfaction as it relates to ABE programming, offerings, instruction, and support.
 - **Benchmark:**
 - Improved retention of ABE students.
- 4. The ABE program will develop a new intake and orientation process that utilizes a design that allows for better documentation of students NRS goals and provides more institutional and transitional information.
 - **Performance Measure:**
 - Compare student NRS goal data to FY07 – look for improvement.
 - Survey students for quality feedback, use as needed.
 - **Benchmark:**
 - Improved core outcome measure performance in the transition to higher education goal.

GOAL V: Clearly identify content that is pertinent to the general program of study in all certificate programs with embedded related instruction.

Objectives:

- 1. The instructors in all certificate programs that contain embedded related general education content will clearly identify that content in the course syllabus.
 - **Performance Measure:**
 - 100 % inclusion of general education content in each course syllabi.
 - **Benchmark:**
 - Course syllabi will be reviewed and updated and will clearly show where embedded general education content is taught in each course where such content occurs.
- 2. In conjunction with the Dean of Students, develop a plan for General Education Division Faculty to advise non-matriculated students.
 - **Performance Measure:**
 - Number of students advised by the General Education Division Faculty.

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- **Benchmark:**
 - Increased participation by General Education Faculty in non-matriculated advising.

GOAL VI: Review and revise the evaluation policy to assure that all program and faculty are evaluated systematically and consistently using multiple indices.

Objectives:

1. Revise faculty evaluation policy to assure that all full and part-time faculty are evaluated systematically and consistently using multiple indices. NWCCU recommendation #3.
 - **Performance Measure:**
 - Number of indices used to evaluate faculty.
 - 100% of faculty evaluated utilizing the new policy.
 - **Benchmark:**
 - Implement and evaluate the new evaluation policy.
2. Participation by at least half of full-time faculty in peer evaluation training in fall of 2008 with subsequent evaluation duties in FY09.
 - **Performance Measure:**
 - At least 50% of full-time faculty trained and participating in peer evaluation.
 - **Benchmark:**
 - Active participation of full-time faculty in peer evaluation process.
3. Develop and evaluate a comprehensive program review process.
 - **Performance Measure:**
 - Number of programs reviewed.
 - 100% of review results used to drive program decisions (expansion, reduction, modification, etc).
 - **Benchmark:**
 - Implement the process.

GOAL VII: Evaluate facility and infrastructure needs to support student success.

Objectives:

1. Implement and refine policy on network security. NWCCU Recommendation #4.
 - **Performance Measure:**
 - 50% reduction in faculty and staff access complaints.
 - **Benchmark:**
 - Balanced policy that allows academic freedom while ensuring networking security.
2. Implement approved campus upgrade and renovation projects.
 - **Performance Measure:**
 - 100% on time completion of all projects.
 - Projects do not exceed 100% of budget.
 - **Benchmark:**
 - Successful completion of approved projects.

Key External Factors (beyond the control of Eastern Idaho Technical College)

Funding:

Most State Board of Education strategic goals and objectives assume on-going and sometimes significant additional levels of State legislative appropriations. Availability of state revenues (for appropriation), gubernatorial, and legislative support for some Board initiatives can be uncertain.

Legislation/Rules:

Beyond funding considerations, many education policies are embedded in State statute or rule and not under Board control. Changes to statute and rule desired by the Board of Education are accomplished according to State guidelines. Rules require public notice and opportunity for comment, gubernatorial support, and adoption by the Legislature. Proposed legislation must be supported by the Governor, gain approval in the germane legislative committees and pass both houses of the Legislature.

Federal Government: A great deal of education funding for Idaho public schools is provided by the federal government. Funding is often tied to specific federal programs and objectives and therefore can greatly influence education policy in the State.



COLLEGE OF WESTERN IDAHO

DRAFT STRATEGIC PLAN 2008-2015

PURPOSE STATEMENT

COLLEGE OF WESTERN IDAHO

The College of Western Idaho is a valued community asset that will help transform its ten-county service region (Region III) by providing leadership for its educational and economic future.

CWI will serve as a locally-controlled tool for strengthening regional economic development and enhancing quality of life by empowering businesses and individuals to develop talent, increase productivity and seize opportunities to enhance their future.

CWI is a valued community partner that continuously works with communities to identify the needs and solutions for local and prospective employers, businesses, donors, and neighbors to help everyone ACHIEVE MORE.

PLEASE NOTE: THE MISSION, VISION AND VALUES BELOW ARE GOING THROUGH MULTIPLE REVIEWS BY THE BOARD, STAFF AND COMMUNITY AND MAY BE ALTERED.

DRAFT VISION

We are a valued community asset enhancing lives, learning and prosperity.

DRAFT MISSION

The Mission of the College of Western Idaho is to develop '21st Century Learning Platforms' for students to transition to baccalaureate programs, achieve adult basic literacy, and acquire necessary skill sets for a dynamic local and global economy. We serve our students and communities through the use of a variety of innovative delivery systems and offer a dynamic array of programs, courses and services.

CORE VALUES

"Our '**LEGACY**' is lifting up students through learning!"

Learning at CWI where:

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Every student receives quality education and training, regardless of time or distance;

Goals are achievable by students, employers, and the community;

Access and affordable education and training open windows to the world;

Customers are our passion; and

You achieve more!

DRAFT GOALS

**PLAN 2015
ACHIEVE MORE!**

- GOAL 1:** The College of Western Idaho serves as a gateway to education and training for all its communities by creating quality learning platforms from which students can launch their future success.
- GOAL 2:** The College of Western Idaho expands access to higher education and 21st century technical skill acquisition for all its communities.
- GOAL 3:** The College of Western Idaho is a catalyst for economic development through strategic partnerships with employers.

DRAFT GOALS AND OBJECTIVES

**PLAN 2015
ACHIEVE MORE**

These goals are written as conditions that will exist in the future through carefully selected objectives and intentional tracking of performance. They work together to focus the college, its attention, work, and resources.

- GOAL 1:** The College of Western Idaho serves as a gateway to education and training for all its communities by creating quality learning platforms from which students can launch their future success.

Objectives for Gateway to Quality Learning Platforms:

- 1.1 Develop necessary action plan to achieve accreditation
Performance Measures:**

- **Achieve full accreditation in the minimal amount of time**

Benchmark:

- **Meet requirements of the Northwest Accrediting Commission**

1.2 Insure optimal student success through individual goal attainment; be known as 'student centric'

Performance Measures:

- **Track student graduation rate**
- **Track Licensure and Certification Pass rates**
- **Track placement rate**
- **Track transfer rate**

Benchmark:

- **Determine current community college rates for the above measures and target an annual increase in these rates**

1.3 Form partnerships with other institutions that provide students and the community with global awareness and experiences

Performance Measures:

- **Increase enrollment**

Benchmark:

- **Identify best practices in global learning experiences**

1.4 Establish CWI as a leader in Adult Basic Education

Performance Measure:

- **Increase attendance of under prepared students**
- **Increase number of students transitioning into higher education**

Benchmark:

- **Increase the percentage of students matriculating into higher education from basic skills classes**

1.5 Create strong customer service based on our value that "customers are our passion!"

Performance Measure:

- **Achieve high rate of student satisfaction**

- **Score high on Community Relations Management Satisfaction Index**

Benchmark:

- **Research 'national student satisfaction' instruments and results and target an increase in the national average each year**

1.6 Ensure academic excellence through the hiring of highly qualified faculty and staff

Performance Measures:

- **Meet required qualifications for hiring**
- **Provide professional development**

Benchmark:

- **Track standards from League of Innovation for hiring and retention**

1.7 Create a clear platform for students to transfer to universities

Performance Measures:

- **Increase transfer rate to universities**

Benchmark:

- **Research state's current transfer rate/improve upon rate each year**

1.8 Establish state-of-the-art student management system

Performance Measures:

- **Attain a high rate of student and employee satisfaction**

Benchmark:

- **Review and apply Baldrige criteria to CWI student services**

GOAL 2: The College of Western Idaho expands access to higher education and 21st century technical skills acquisition for all its communities.

Objectives for Access:

2.1 Ensure affordable education and training for all students

Performance Measures:

- Decrease amount that students are currently paying
- Increase opportunity for financial aid
- Increase opportunity for scholarships

Benchmark:

- Determine the best ways to help students finance their education and training, through the League of Innovation for community colleges

2.2 Build a dynamic, inclusive culture for students and CWI personnel through a dynamic human resource system

Performance Measures:

- Increase student retention
- Increase employee retention
- Increase student satisfaction

Benchmark:

- Research current statistics on a state and national level for Freshman retention, improve upon that percentage

2.3 Provide a wide variety of delivery options and locations for students

Performance Measures:

- Track numbers of students using each delivery option
- Market convenience, thereby improving perception
- Increase number of on-line students

Benchmark:

- Research comprehensive community colleges and their percentage of delivery options

2.4 Provide an open-door philosophy by serving students who may otherwise be denied access to postsecondary education

Performance Measures:

- Increase number of underserved students
- Attain high level of student satisfaction

- Increase retention

Benchmark:

- Research best practices on serving under-prepared students through open enrollment

2.5 Create partnerships with K-12 learning institutions in creative formats such as 'college high schools'

Performance Measures:

- Increase number of students from local high schools attend CWI
- Increase graduation rates

Benchmark:

- Research top high schools in the nation in transfer rates to local community colleges; determine the contributing factors; create a model; use 'Achieving the Dream' research findings

2.6 Acquire and operate state-of-the art technology for administration and classroom instruction

Performance Measures:

- Increase student satisfaction
- Increase retention
- Increase staff retention

Benchmark:

- Through benchmarking with other educational institutions, discover lessons learned and recommendations for improvements to CWI's current systems

2.7 Implement an institutional effectiveness office for data gathering, analysis, and continuous improvement

Performance Measures:

- Create a culture of evidence at CWI
- Use data to measure success in all areas of the institution: students, processes, people development, and finances

Benchmark:

- **Research and determine best practices in institutional effectiveness offices**

GOAL 3: The College of Western Idaho is a catalyst for economic development through strategic partnerships with employers.

Objectives for Responsiveness to Employers and Economic Development Possibilities:

3.1 Create an innovative, flexible image with the business community

Performance Measures:

- **Achieve a high level of business community satisfaction**

Benchmark:

- **Use the League of Innovation to determine the factors that establish the innovative image for the community college**

3.2 Address the needs of our customers

Performance Measures:

- **Track customer responsiveness**
- **Measure student satisfaction**
- **Measure employer satisfaction**

Benchmark:

- **Research the optimum turn-around time for responsiveness to student and employer inquiries and how best to track performance**

3.3 Be an active partner in economic development in the regions

Performance Measures:

- **Track the number of jobs added to the region due to training at CWI**

Benchmark:

- **Review the number against current data from new employers**

- 3.4 Create partnerships with local business and industry to discover what they need from their workforce to increase their productivity and create a plan to address that need**

Performance Measures:

- Increase participation from local business and industries

Benchmark:

- Identify best practices in economic development creation where partnerships with community colleges exist

- 3.5 Establish active partnerships with local economic development agencies to participate in attracting new businesses to the region**

Performance Measures:

- Track the number of new businesses where CWI is an active partner

Benchmark:

- Identify best practices in economic development creation where there are partnerships with community colleges

- 3.6 Expand the capacity to create customized employer training that is essential for new business development and business expansion in the region**

Performance Measures:

- Increase number of employers using customized training
- Contribute to local companies' expansion and growth

Benchmark:

- Determine best practices of customized training programs, nationally

- 3.7 Combine school site and work site learning through practicum, internships, and apprenticeships to better equip students with the skills that employers demand**

Performance Measures:

- Increase employer satisfaction
- Increase employee satisfaction

Benchmark:

- Determine best practices for on-site learning experiences

3.8 Create the reputation in the region that the best prepared workforce lives here and was prepared in part by CWI

Performance Measures:

- Identify the importance of the availability and access of workforce training to businesses as major reasons to locate to or expand in the valley.

Benchmark:

- Identify the regions and their marketing strategy which link the workforce closely with economic development and business attraction

Key External Factors (beyond control of the College of Western Idaho):

Funding:

Most of the strategic goals of the College of Western Idaho assume on-going and sometimes significant additional levels of resources. Availability of revenues can be uncertain.

Legislation/Rules:

Beyond funding considerations, some education policies are embedded in state statute or rule and not under control of the local CWI Trustees

Newness of the College of Western Idaho:

The Community College Yes! Campaign resulted in strong support for a new community college to serve this service region. CWI is learning about its customer base, their needs and their diversity.

Federal Government:

Much of educational funding for Idaho schools is provided by the federal government. Funding is often tied to specific federal programs and objectives, and therefore can greatly influence education policy in the State.



College of Southern Idaho Strategic Plan 2008 – 2012



Statutory Authority

This plan has been developed in compliance with Sections 67-1901 to 67-1903, Idaho Code, and Standard One of the Northwest Commission on Colleges and Universities (NWCCU), and has been approved by the College of Southern Idaho Board of Trustees. The statutory authority and the enumerated general powers and duties of the Board of

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Trustees of a junior (community) college district are established in Sections 33-2101, 33-2103 to 33-2115, Idaho Code.

Mission Statement

The College of Southern Idaho, a comprehensive community college, provides quality educational, social, cultural, economic, and workforce development opportunities that meet the diverse needs of the communities it serves. CSI prepares students to lead enriched, productive, and responsible lives in a global society.

Core Values

The following core values, principles and standards guide our vision and conduct:

People

Above all, we value our students, employees, and community. We celebrate individual uniqueness, worth, and contributions while embracing diversity of people, backgrounds, experiences, and ideas. We are committed to the success of our students and employees.

Learning

We value lifelong learning, informed engagement, social responsibility, and productive global citizenship. We have an unwavering commitment to student learning and success. We strive to instill in our students and employees a lifelong passion for learning.

Access and Opportunity

We value convenient, affordable, and equitable access to higher education. We make every effort to eliminate or minimize barriers to access. We create opportunities for educational, personal, and economic success.

Quality and Excellence

We strive for excellence in all of our endeavors. We offer high-quality educational programs and services that are of value to our constituents. We are committed to high academic and professional standards, and to the continuous improvement of our educational programs, services, processes, and outcomes.

Creativity and Innovation

We value and support innovative and creative ideas and solutions that foster improvement and allow us to better serve our students and our community. We encourage entrepreneurial spirit.

Responsibility and Accountability

We value personal and institutional integrity, responsibility, and accountability. We believe in serving our constituents responsibly in order to preserve the public's ongoing trust. We strive to develop an environment that encourages and enables a culture of meaningful assessment and continuous improvement. We value inspired, informed, transparent, and responsible leadership and decision-making at all levels of the College. We value our environment and the conservation of our natural resources and strive to create facilities, systems, programs, and practices that are environmentally sustainable.

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Collaboration and Partnerships

We value collaboration and actively pursue productive and mutually beneficial partnerships among people, institutions, organizations, and communities to share diverse ideas, talents, and resources.

Vision 2012

The College of Southern Idaho will be recognized regionally and nationally as a progressive community college committed to student learning and success, and to the human, economic, cultural, and social development of the region.

- We will be the higher education institution of choice because of our instructional excellence, exemplary support services, and our accessibility and affordability.
- We will challenge our students and foster intellectual curiosity, critical inquiry, creative problem solving, and thoughtful reasoning.
- We will inspire our students to become lifelong learners, productive workers, engaged leaders, and responsible global citizens.
- We will support our employees by providing the necessary training, information, and resources; and expect active participation, responsible decision-making, high performance, and personal accountability.
- We will use appropriate information technologies that support and enhance teaching and learning, improve accessibility and quality of services, and improve effectiveness and efficiency.
- We will maintain the ongoing trust of our constituents by demonstrating responsible management and investment of the resources entrusted to us.
- We will be responsible stewards of our natural resources.

Strategic Initiatives

1. Responsiveness
2. Commitment to Learning and Success
3. Performance and Accountability
4. Global Citizenship and Competitiveness
5. Advocacy

Goals and Objectives

1. *Strategic Initiative:* Responsiveness to the diverse and changing needs of our students and the communities we serve

1.1. *Goal:* Access to our programs, resources, and services

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- 1.1.1. Provide convenient, affordable, and equitable access to our programs, services, and resources
- 1.1.2. Eliminate or minimize barriers to access
- 1.1.3. Expand early awareness and pre-college programs
- 1.1.4. Continue to strengthen our relationship with school counselors, teachers, and administrators
- 1.1.5. Effectively communicate the benefits of attending CSI
- 1.1.6. Expand recruiting efforts to include all prospective student groups
- 1.1.7. Encourage parent and peer involvement
- 1.1.8. Maintain the affordability of our programs and services
- 1.1.9. Continue to increase the availability of need-based and merit-based financial aid and scholarships to all student groups
- 1.1.10. Make application for admission and course registration processes more convenient
- 1.1.11. Develop and provide new student orientation and freshman seminar
- 1.1.12. Implement online one-stop shop

1.2. Goal: Strategic marketing

- 1.2.1. Adopt a College-wide strategic marketing focus
- 1.2.2. Develop and implement a comprehensive marketing strategy based on a thorough understanding of the needs of our stakeholders and reinforced by every element of the marketing mix
- 1.2.3. Meet the diverse and changing needs and expectations of our students
 - 1.2.3.1. Know and meet current needs and anticipate future needs of our prospective and current students
 - 1.2.3.2. Offer quality educational programs and services that meet the needs of students with diverse backgrounds, socioeconomic statuses, experiences, preparation levels, abilities, learning styles, and educational objectives
 - 1.2.3.3. Provide university parallel curriculum for transfer students, state-of-the-art program of professional-technical education, appropriate developmental education, workforce training and development, enrichment programs, continuing education, and professional development
 - 1.2.3.4. Provide courses and programs when and where needed, in the format needed
 - Increase course offerings at alternative times and locations and utilize alternative delivery methods
 - Expand anytime, anywhere access to programs and services
 - Continue to expand distance learning courses and programs
 - Continue to expand dual credit offerings
 - 1.2.3.5. Continue to expand and improve student services
 - 1.2.3.6. Effectively promote our programs and services
 - 1.2.3.7. Target recruiting and promotional efforts by focusing on segments that will provide the highest return on our investment

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- 1.2.3.8. Maintain a healthy, safe, and inviting learning environment that is conducive to learning
- 1.2.4. Meet the diverse and changing needs and expectations of employers in the area
 - 1.2.4.1. Provide workforce training and development, short-term customized training, and industry certifications
 - 1.2.4.2. Ensure that the curricula provide the skills, knowledge, and experiences most needed by employers
 - 1.2.4.3. Train globally competitive workers
 - 1.2.4.4. Develop mutually beneficial partnerships with industry
- 1.2.5. Meet the diverse and changing needs and expectations of the communities we serve
 - 1.2.5.1. Serve as an engine for economic, social, and cultural development and vitality
 - 1.2.5.2. Contribute to improved quality of life in the region
 - 1.2.5.3. Develop the region's most important resource – its human capital – by providing lifelong learning opportunities
 - 1.2.5.4. Provide access to expertise and state-of-the art facilities

2. Strategic Initiative: Commitment to learning and the success of our students, employees, and institution

2.1. Goal: Student learning and success

- 2.1.1. Demonstrate an unwavering commitment to, and shared responsibility for, student learning and success
- 2.1.2. Identify and reduce barriers to student learning and success
- 2.1.3. Develop clear pathways to student success
- 2.1.4. Continue to improve the quality, relevancy, and rigor of our courses and programs
- 2.1.5. Set high standards for student learning, performance, and achievement
- 2.1.6. Challenge and empower students to take responsibility for their own learning
- 2.1.7. Employ effective and innovative instructional strategies
- 2.1.8. Develop subject matter competence, effective communication, critical thinking, creative problem solving, interpersonal relations, and leadership skills
- 2.1.9. Focus on active and collaborative learning and meaningful engagement
- 2.1.10. Implement an interdisciplinary approach to learning
- 2.1.11. Offer experiential and service learning opportunities
- 2.1.12. Continually improve educational attainment (persistence, degree completion, transfer) and achievement of career goals
- 2.1.13. Strive to create a seamless learning environment by effectively blurring the lines between in-classroom and out-of-classroom learning
- 2.1.14. Encourage active engagement (on and off-campus) and social responsibility

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- 2.1.15. Develop and expand partnerships with K-12 schools, community colleges, four-year institutions, and other public and private organizations that will allow us to help our students reach their educational and career goals

2.2. Goal: Employee learning, growth, and success

- 2.2.1. Recognize that employees are our greatest asset
- 2.2.2. Recruit and retain faculty and staff who are committed to student learning and success
- 2.2.3. Emphasize the role of faculty, staff, and administration as learners and teachers
- 2.2.4. Develop strategic thinking skills and build a leadership pipeline (grow our own leaders)
- 2.2.5. Support employees by providing the necessary resources, tools, and information needed to do their jobs effectively
- 2.2.6. Improve communication and collaboration within and across divisions, departments, and functions
- 2.2.7. Appropriately distribute decision-making authority, responsibility, accountability
- 2.2.8. Develop and implement a needs-based, comprehensive employee development program
- 2.2.9. Provide ongoing training and professional development opportunities
- 2.2.10. Develop a campus-wide system to effectively track and assess professional development participation and success
- 2.2.11. Recognize and reward competence, performance, and contributions to the attainment of our strategic goals and objectives
- 2.2.12. Maintain competitive faculty and staff compensation that is comparable to that of our peer institutions
- 2.2.13. Appreciate and celebrate employee contributions and successes

2.3. Goal: Institutional growth and success

- 2.3.1. Plan for growth and manage it strategically and effectively
- 2.3.2. Employ effective market, product, technology, facilities, operations, and management and systems strategies that foster sustainable growth
- 2.3.3. Create and implement a strategic enrollment plan that promotes student success, addresses effective recruitment and retention, and is supported by programs, resources, and services that meet the needs of our students
- 2.3.4. Maintain an entrepreneurial approach to program and niche development
- 2.3.5. Continue to critically analyze our program mix, class scheduling, and resource allocation
- 2.3.6. Ensure that the College remains financially viable and sustainable
- 2.3.7. Implement cost-saving strategies while maintaining the quality of our programs and services
- 2.3.8. Identify and aggressively pursue new revenue sources
- 2.3.9. Strengthen internal and external communication and collaboration
- 2.3.10. Continue to develop mutually beneficial partnerships
- 2.3.11. Build and maintain facilities that support teaching and learning

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- 2.3.12. Utilize appropriate information technologies effectively and efficiently
- 2.3.13. Ensure compliance with applicable laws and regulations and manage risk effectively
- 2.3.14. Strengthen emergency and disaster planning and preparedness

3. Strategic Initiative: Performance and accountability

3.1. Goal: Culture of planning, assessment, and continuous improvement

- 3.1.1. Encourage and enable campus-wide participation in institutional planning and assessment activities
- 3.1.2. Create an environment where all employees assume responsibility for their role in the institutional planning and effectiveness processes
- 3.1.3. Ensure that strategic initiatives, goals, and objectives drive our decision-making and everyday operations
- 3.1.4. Allocate resources based on established priorities and performance - the strategic plan drives the budgeting process
- 3.1.5. Align unit operational plans with the College strategic plan
- 3.1.6. Continually assess and improve the quality, relevancy, efficiency, and effectiveness of our systems, programs, services, processes, and practices
- 3.1.7. Develop a campus-wide comprehensive institutional effectiveness framework and sound procedures for assessing performance outcomes
- 3.1.8. Perform meaningful assessment for continuous improvement and accountability
 - 3.1.8.1. Gather, analyze, and interpret evidence of institutional effectiveness
 - 3.1.8.2. Use the results to improve student and institutional performance
- 3.1.9. Employ effective measures, methodologies, and technologies to facilitate planning, assessment, and reporting
 - 3.1.9.1. Ensure data quality, integrity, and validity
 - 3.1.9.2. Utilize appropriate reporting and analytic methods to accurately and systematically measure and increase performance
 - 3.1.9.3. Build business intelligence capabilities that will allow the College to go beyond reporting on what has happened to analyzing where the problems are, figuring out why the problems have occurred and what corrective actions are needed, and forecasting what will happen if the trends continue
 - 3.1.9.4. Make meaningful and useful data and analyses available when and where needed, in the format needed
- 3.1.10. Use data and analysis to inform our decisions, guide our planning processes, and serve as quality assurance for our stakeholders
- 3.1.11. Communicate performance levels internally and externally
- 3.1.12. Create formal processes for periodic and systematic review and revision of the strategic plan and outcomes assessment
- 3.1.13. Dedicate adequate resources for planning and assessment

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- 3.1.14. Provide the necessary procedural, training, and technical support

3.2. Goal: Stewardship and accountability

- 3.2.1. Demonstrate public accountability (legal, fiscal, and programmatic)
3.2.2. Maintain public trust through transparency and responsible stewardship of the resources entrusted to us
3.2.3. Allocate, manage, and invest human, financial, physical, and intellectual resources prudently, effectively, and efficiently
3.2.4. Effectively communicate College performance in carrying out its mission

4. Strategic Initiative: Global citizenship and competitiveness

4.1. Goal: Global awareness, engagement, and competitiveness

- 4.1.1. Educate stakeholders on the importance and value of global education to the success of our students and to the long-term viability and prosperity of our community, state, and nation
4.1.2. Actively contribute to increased global awareness, understanding, engagement, and competitiveness
4.1.3. Promote understanding of global interdependence by infusing global perspectives and integrating international and intercultural education across the curricula
4.1.4. Provide quality educational programs and experiences that prepare students to compete successfully in an increasingly interconnected global marketplace
4.1.5. Ensure that our students gain the knowledge, skills, perspectives, and attitudes necessary to thrive in a global society and become responsible global citizens
4.1.6. Utilize innovative technologies to expand international exchanges
4.1.7. Encourage and provide opportunities for our students to interact with and learn from others' multicultural and international experiences
 4.1.7.1. Facilitate interaction with people from different social, cultural, and linguistic backgrounds
 4.1.7.2. Recruit and retain international students
4.1.8. Provide opportunities for international experiences
 4.1.8.1. Promote study abroad and international service learning opportunities
 4.1.8.2. Provide international travel opportunities
4.1.9. Encourage and support faculty/staff participation in global learning opportunities
4.1.10. Collaborate with other institutions on global initiatives

4.2. Goal: Environmental sustainability

- 4.2.1. Promote stewardship of our natural resources
4.2.2. Provide leadership and raise the visibility of environmental initiatives
4.2.3. Engage students, employees, and the community in open discourse about the importance of the environment and our role in conserving it for future generations

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- 4.2.4. Provide information and training on the sustainability of our environment through conservation and innovation
- 4.2.5. Incorporate environmental education and sustainability principles across the curricula
- 4.2.6. Do our part in preserving a clean and healthy environment
- 4.2.7. Strive to develop and implement facilities, systems, and practices that are environmentally sustainable - reduce, reuse, and recycle
 - 4.2.7.1. Minimize our environmental impact
 - 4.2.7.2. Continue to improve water and energy conservation practices
 - 4.2.7.3. Protect renewable natural resources

5. Strategic Initiative: Commitment to further develop and effectively target our advocacy efforts

5.1. Goal: Institutional identity and positioning

- 5.1.1. Implement effective and integrated marketing communication strategies
- 5.1.2. Strengthen and consistently communicate our institutional identity that is in line with our mission, vision, and strategic plan
- 5.1.3. Strengthen and increase the recognition of our brand
- 5.1.4. Achieve greater regional and national visibility
- 5.1.5. Position CSI as a regionally and nationally recognized progressive community college focused on student learning and success
- 5.1.6. Strive to continually enhance our reputation and image
- 5.1.7. Manage and create positive perceptions and improve media relations
- 5.1.8. Communicate evidence of institutional effectiveness and our value and contributions to the community, state, nation, and beyond
- 5.1.9. Celebrate and widely publicize successes of our students, faculty, staff, and the College

5.2. Goal: Institutional advancement

- 5.2.1. Align institutional advancement priorities and activities with our mission, vision, goals, and objectives
- 5.2.2. Build strong relationships with a variety of constituents
- 5.2.3. Encourage involvement and participation in the College
- 5.2.4. Foster pride and loyalty to the institution
- 5.2.5. Further expand strategic grant development efforts
- 5.2.6. Leverage institutional advancement efforts through partnerships
- 5.2.7. Support the CSI Foundation in its fundraising efforts

5.3. Goal: Government relations and community college advocacy

- 5.3.1. Promote the community college mission locally, statewide, and nationally
- 5.3.2. Raise awareness of the role of community colleges in providing lifelong learning opportunities and contributing to the economic, social, and cultural development of the communities they serve
- 5.3.3. Articulate the needs of the College clearly and persuasively
- 5.3.4. Effectively represent CSI's budget, policy, and program interests to local, state, and national elected officials and government agencies at all levels

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- 5.3.5. Ensure that the College receives the appropriate support and recognition
- 5.3.6. Advocate for adequate funding to carry out our mission and vision
- 5.3.7. Effectively communicate the impact of and positive outcomes derived from the support received
- 5.3.8. Partner with other sister institutions and strengthen linkages to various community college advocacy groups

External Factors

Various external factors outside CSI's control could significantly impact the achievement of goals and objectives outlined in the strategic plan:

- Demographic changes (e.g. changes in the number of high school graduates, retirement of the Baby Boomers, growing minority population, etc.)
- Circumstances of and strategies employed by our partners (e.g. K-12, higher education institutions, local industry)
- Changes in market forces and competitive environment (e.g. distance learning providers)
- Supply of and competition for highly qualified faculty and staff
- Changes in the economic environment (e.g. inflation, energy cost, personal income, unemployment and underemployment, foreclosure and bankruptcy rates, globalization, the value of the dollar, availability of credit, etc.)
- Changes in national or state priorities
- Significant changes in local, state or federal funding
- Government-wide policies
- Legal and regulatory constraints
- Changes in technology (access, affordability, efficiency)
- Changes in the physical environment (e.g. drought)
- Natural disasters, pandemic, acts of war/terrorism

CSI will make every effort to anticipate and manage change effectively, establish and implement effective risk management policies and practices, and minimize the negative impacts of factors beyond the institution's control.

DRAFT Performance Measures/Benchmarks*

*Pending final review and approval from the CSI Board of Trustees

The performance measures and benchmarks are based on the literature on community college success indicators, best practices, historical data, trends observed, as well as assumptions and forecasts.

Experts in the field agree that performance measures and benchmarks used to measure community college institutional effectiveness should carefully consider: the mission and

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varied roles community colleges must fulfill, the diversity of student populations served, open admission policies, diverse educational goals that may or may not include earning a degree or certificate, etc.

Sources:

Alfred, R., Shults, C., & Sybert, J. (2007). *Core Indicators of Effectiveness for Community Colleges* (3rd ed.). Washington, D.C: Community College Press, American Association of Community Colleges.

Flores, S.M. (2006). *Benchmarking: An Essential Tool for Assessment, Improvement, and Accountability: New Directions for Community Colleges*, No. 134, San Francisco, CA: Jossey-Bass.

Banta, T.W. (2004). *Community College Assessment*, San Francisco, CA: Jossey-Bass.

Community College Survey of Student Engagement (CCSSE), a benchmarking instrument that establishes national norms on educational practice and performance by community and technical colleges. <http://www.ccsse.org/>

The National Community College Benchmark Project (NCCBP) that provides national and peer community college effectiveness indicator data. <http://www.nccbp.org/>

The Kansas Study, a national study of Community College Instructional Costs and Productivity. <http://www.kansasstudy.org>

College of Southern Idaho 2008 – 2012		
DRAFT Performance Measures	DRAFT Benchmarks/ Performance Targets	CSI Goals
1. Enrollment - academic, professional-technical, developmental, continuing education, workforce training, distance learning, on main campus, remote to main campus, dual credit, international <ul style="list-style-type: none"> Headcount Credit hours FTE 	<ul style="list-style-type: none"> Overall headcount will increase by 2% a year Overall FTE will increase by 1% a year 	1.1., 1.2., 2.1., 2.3., 4.1., 4.2., 5.1., 5.2., 5.3.
2. Market penetration - eight-county participation rates	By 2012 the percentage of population aged 16 or above in CSI's eight-county service area that participates in an instructional course sponsored by CSI during a given calendar year will increase to 12%.	1.1., 1.2., 2.1., 2.3., 4.1., 4.2., 5.1., 5.2., 5.3.
3. Instructional costs per academic/PTE	Instructional costs per	2.3., 3.1.,

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College of Southern Idaho 2008 – 2012		
DRAFT Performance Measures	DRAFT Benchmarks/ Performance Targets	CSI Goals
credit hour and academic/PTE student FTE	academic/PTE credit hour and academic/PTE student FTE will compare favorably with peer group.	3.2., 4.2.
4. Student/faculty ratio	Maintain the average student/faculty ratio at levels - full-time equivalent students to full-time equivalent instructional faculty – comparable to those of our peer institutions.	1.1., 1.2., 2.1., 2.2., 2.3., 3.1., 3.2., 4.1., 4.2., 5.1., 5.2., 5.3.
5. Student/staff ratio	Maintain the average student/staff ratio at levels – full-time equivalent students to full-time equivalent staff – comparable to that of our peer institutions.	1.1., 1.2., 2.1., 2.2., 2.3., 3.1., 3.2., 4.1., 4.2., 5.1., 5.2., 5.3.
6. Financial aid/scholarships disbursed	The percentage of eligible students receiving financial aid/scholarships will increase. Scholarship dollars per student FTE (academic/PTE) will increase. The default rate will be maintained under 10%.	1.1., 2.3., 3.2., 5.2., 5.3.
7. Retention rates	Retention rates will increase.	1.2., 2.1., 2.3.
8. Success in subsequent related coursework - the proportion of students identified as lacking basic skills in reading, writing, and math who earned a grade of C or better in non-developmental college courses after having completed developmental work	Success rates in subsequent related coursework will be maintained at or above current levels.	1.2., 2.1., 2.3.
9. Student engagement and satisfaction rates		
<ul style="list-style-type: none"> Active and collaborative learning 	CCSSE survey results will demonstrate active and collaborative learning ratings at or above the national comparison group.	1.2., 2.1.
<ul style="list-style-type: none"> Student effort 	CCSSE survey results will demonstrate student effort ratings at or above the national comparison group.	2.1.

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College of Southern Idaho 2008 – 2012		
DRAFT Performance Measures	DRAFT Benchmarks/ Performance Targets	CSI Goals
<ul style="list-style-type: none"> Academic challenge 	CCSSE survey results will demonstrate academic challenge ratings at or above the national comparison group.	1.2., 2.1.
<ul style="list-style-type: none"> Student-faculty interaction 	CCSSE survey results will demonstrate student-faculty interaction ratings at or above the national comparison group.	1.2., 2.1.
<ul style="list-style-type: none"> Support for learners 	CCSSE survey results will demonstrate support for learners ratings at or above the national comparison group.	1.2., 2.1.
10. Course and program learning outcomes	Every course and program will develop and implement appropriate outcomes assessment strategies.	2.1.
11. Student and faculty participation in international travel opportunities	The number of students who participate in international travel will increase.	2.1., 4.1.
12. Participation in study abroad opportunities	Develop a study abroad program. Increase number of students who participate in the program – two new students per year.	2.1., 4.1.
13. Responsiveness to community and workforce needs.	Number and types of courses and programs started in response to community and workforce need.	1.1., 1.2., 2.1., 2.3.
14. Number of courses that incorporate global issues into the curriculum	Increase the number of courses that incorporate global issues into the curriculum.	2.1., 4.1.
15. Number of courses that incorporate sustainability issues into the curriculum	Increase the number of courses that incorporate sustainability issues into the curriculum.	2.1., 4.2.
16. Summary of sustainability practices implemented	Develop and publish report on sustainability practices implemented.	3.2., 4.2.
17. Number of presentations, events, and activities that incorporate global issues	Every fall and spring semester CSI will have at least five presentations, events, or activities that incorporate global issues.	2.1., 4.1.
18. Number of presentations, events, and activities that incorporate sustainability issues	Every fall and spring semester CSI will have at least five presentations, events, or activities	2.1., 4.2.

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College of Southern Idaho 2008 – 2012		
DRAFT Performance Measures	DRAFT Benchmarks/ Performance Targets	CSI Goals
	that incorporate sustainability issues.	
19. Persistence - the proportion of students who enrolled for the first time at the beginning of one academic year and who (1) were still enrolled for at least one credit at the beginning of the next academic year and who (2) had not yet completed a degree or certificate	Maintain or increase persistence rates.	1.2., 2.1., 2.3.
20. Graduation rates	Graduation rates - the proportion of students who enrolled in and subsequently completed a degree or certificate program – will increase.	1.2., 2.1., 2.3.
21. Transfer rates	<ul style="list-style-type: none"> By the end of 2012 achieve a transfer rate of 30% of all first-time, full-time, degree-seeking students four years after initial fall enrollment. By the end of 2012 achieve a transfer rate of 45% within four years of all students indicating a desire to transfer at initial enrollment. 	1.2., 2.1., 2.3., 3.1.
22. Licensure and certification pass rates as compared to the national or state norms when available	Achieve licensure and certification rates above national rates for all programs with applicable exams.	2.1., 3.1.
23. Employment status of professional-technical graduates	At least 90% of PTE graduates will be employed in their field of study one year after graduation.	2.1., 3.1.
24. Employer satisfaction with graduates	Survey results will demonstrate an overall satisfaction with PTE graduates.	1.2., 2.1.
25. Faculty/staff satisfaction rates	Survey results will demonstrate high (above 75%) faculty and staff satisfaction rates.	2.2., 2.3.
26. Employee compensation competitiveness	CSI employee salaries will be at the mean or above for comparable positions in the Mountain States Community College survey.	2.2., 2.3.
27. Client satisfaction with programs and services	Course evaluations and graduation surveys will demonstrate high	1.1., 1.2., 2.1., 2.3.

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College of Southern Idaho 2008 – 2012		
DRAFT Performance Measures	DRAFT Benchmarks/ Performance Targets	CSI Goals
	levels (above 75%) of satisfaction with programs and services.	
28. Annual institutional effectiveness report	Continue to monitor institutional effectiveness through yearly review of benchmarks and other performance data and biannual institutional profile report.	3.1., 3.2.
29. Level of support for CSI		
<ul style="list-style-type: none"> Total yearly dollar amount generated through external grants 	Pursue and achieve funding and/or meritorious evaluation for at least 5 relevant grant opportunities per year. Grants Coordinator will submit \$2,750,000 yearly in external grant requests with a 30% success rate.	5.2.
<ul style="list-style-type: none"> State funding levels 	Maintain general fund dollars per student FTE at current levels.	5.2., 5.3.
<ul style="list-style-type: none"> Funds raised through the CSI Foundation 	<ul style="list-style-type: none"> By 2012 achieve a minimum of 80% employee participation in the Foundation's internal campaign. By 2012 award Foundation scholarships to at least a third of all eligible students. 	2.1., 2.3., 5.2. 1.1., 2.1., 2.3., 3.1., 5.2.

Idaho State Board of Education

GOVERNING POLICIES AND PROCEDURES

SECTION: I. GENERAL GOVERNING POLICIES AND PROCEDURES

SUBSECTION: M. Annual Planning and Reporting

August 2006

M. Annual Planning and Reporting

1. Strategic Plans

- a. Boise State University, Idaho State University, Lewis-Clark State College, University of Idaho, North Idaho College, College of Southern Idaho, College of Western Idaho, Eastern Idaho Technical College, Division of Professional-Technical Education, Division of Vocational Rehabilitation, Idaho Educational Public Broadcasting System, and the School for the Deaf and the Blind will develop and maintain five-year strategic plans.

- (1) Institution, school and agency strategic plans shall be aligned with the Board's strategic plan, be created in accordance with Board guidelines, and be consistent with assigned role and mission statements.

- (2) Plans shall be updated annually and submitted to the Board for approval.

- (3) Plans shall be submitted by the Board to the appropriate state administrative entity in order to meet the state's annual planning requirements.

- b. The Idaho State Historical Society and Idaho Commission for Libraries are recognized as unique collaborators in the state education system and are encouraged to report annually to the Board in accordance with these guidelines.

- c. **Format**

Plans submitted to the Board annually should be as concise as possible and in accordance with a schedule and format established by the executive director.

Plans should contain:

- (1) A comprehensive mission and vision statement covering the major programs, functions and activities of the organization.

- (2) General goals and objectives for the major programs, functions and activities of the organization, including a description of how they are to be achieved.

- (a) Institutions (including Professional-Technical Education) and the School for the Deaf and the Blind should address, at a minimum, instructional issues (including accreditation and student issues), infrastructure issues (including personnel, finance, and facilities), advancement (including

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foundation activities), and the external environment served by the institution.

- (b) Agencies should address, at a minimum, constituent issues and service delivery, infrastructure issues (including personnel, finance, and facilities), and advancement (if applicable).
- (3) Identification of key factors external to the organization that could significantly affect the achievement of the general goals and objectives.
- (4) A brief description of the evaluations or processes to be used in establishing or revising general goals and objectives in the future.

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TITLE 67
STATE GOVERNMENT AND STATE AFFAIRS
CHAPTER 19
STATE PLANNING AND COORDINATION

67-1901. PURPOSES. The purposes of sections 67-1901 through 67-1905, Idaho Code, are to generate state agency planning and performance information that can be used to:

- (1) Improve state agency accountability to state citizens and lawmakers;
- (2) Increase the ability of the legislature to assess and oversee agency performance;
- (3) Assist lawmakers with policy and budget decisions; and
- (4) Increase the ability of state agencies to improve agency management and service delivery and assess program effectiveness.

67-1902. DEFINITIONS. For purposes of sections 67-1901 through 67-1905, Idaho Code:

- (1) "Agency" means each department, board, commission, office and institution, educational or otherwise, except elective offices, in the executive department of state government. "Agency" does not include legislative and judicial branch entities.
- (2) "Benchmark" or "performance target" means the agency's expected, planned or intended result for a particular performance measure. This information may come from an accepted industry standard for performance or from an agency's careful study, research and/or analysis of the circumstances impacting performance capabilities.
- (3) "Core function" means a group of related activities serving a common end of meeting the main responsibilities of the agency.
- (4) "Goal" means a planning element that describes the broad condition, state or outcome an agency or program is trying to achieve.
- (5) "Major division" means an organizational group within the agency that focuses on meeting one (1) or more of the agency's primary statutory responsibilities.
- (6) "Objective" means a planning element that describes a specific condition, state or outcome that an agency or program is trying to achieve as a step toward fulfilling its goals.
- (7) "Performance measure" means a quantifiable indicator of an agency's progress toward achieving its goals.

67-1903. STRATEGIC PLANNING. (1) Each state agency shall develop and submit to the division of financial management a comprehensive strategic plan for the major divisions and core functions of that agency. The plan shall be based upon the agency's statutory authority and, at a minimum, shall contain:

- (a) A comprehensive outcome-based vision or mission statement covering major divisions and core functions of the agency;
- (b) Goals for the major divisions and core functions of the agency;
- (c) Objectives and/or tasks that indicate how the goals are to be achieved;
- (d) Performance measures, developed in accordance with section 67-1904, Idaho Code, that assess the progress of the agency in meeting its goals in the strategic plan, along with an indication of how the performance measures are related to the goals in the strategic plan;
- (e) Benchmarks or performance targets for each performance measure for, at a minimum, the next fiscal year, along with an explanation of the

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manner in which the benchmark or target level was established; and

(f) An identification of those key factors external to the agency and beyond its control that could significantly affect the achievement of the strategic plan goals and objectives.

(2) The strategic plan shall cover a period of not less than four (4) years forward including the fiscal year in which it is submitted, and shall be updated annually.

(3) The strategic plan shall serve as the foundation for developing the annual performance information required by section 67-1904, Idaho Code.

(4) When developing a strategic plan, an agency shall consult with the appropriate members of the legislature, and shall solicit and consider the views and suggestions of those persons and entities potentially affected by the plan. Consultation with legislators may occur when meeting the requirement of section 67-1904(7), Idaho Code.

(5) Strategic plans are public records and are available to the public as provided in section 9-338, Idaho Code.

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SUBJECT

Agency, Institution, Special/Health Program Performance Report

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section 67-1901 through 1905, Idaho Code

BACKGROUND

Idaho Code Sections 67-1901 through 1905 prescribe how State agencies are to “generate state agency planning and performance information that can be used to:”

1. Improve state agency accountability to state citizens and lawmakers
2. Increase the ability of the legislature to assess and oversee agency performance
3. Assist lawmakers with policy and budget decisions
4. Increase the ability of state agencies to improve agency management, service delivery and assess program effectiveness

State agencies, including institutions and special/health programs (36 Board governed organizations in all) are required to generate and annually update **strategic plans** and to annually submit a **performance report**. The performance report is in two parts.

Part one includes basic “profile” information including:

1. Agency statutory authority.
2. Fiscal year revenue/expenditure.
3. Data about the “number and types of cases managed and/or key services provided to meet agency goals.”

Part two of the performance report “shall contain:”

1. Not more than 10 key quantifiable performance measures which clearly capture the agency’s progress in meeting the goals.
2. Results from each measure for the four prior fiscal years.
3. Benchmarks or performance targets for each measure.
4. Explanations where needed.
5. Attestation from the agency director.

Performance reports are to be approved by the Board and submitted to DFM by September 1st. Idaho law also provides that the agency is to present the information from its performance report orally to Senate and House germane committees.

DISCUSSION

Board governed agencies, institutions, and special/health programs have generally complied with the performance reporting requirement. Unfortunately, there has been significant variation in format and data provided and therefore the

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usefulness of some performance reports. The OSBE staff, in part due to comments from Board members on the recent self-evaluation, has embarked on an initiative to standardize and improve performance reporting.

IMPACT

To better meet annual performance reporting requirements, the Board staff has compiled a suggested list of *cases managed/key services provided* and *performance measures* for each Board governed agency, institution and special/health program. The OSBE staff sought agency/institution input on these data elements. The end result should be more useful agency, institution, and special/health program performance reports for both the Board and the Legislature.

ATTACHMENTS

Attachment 1 – List of Institutions, Agencies, Special/Health Programs under the Board	Page 3
Attachment 2 – Proposed Cases Served/Performance Measures	Page 8

STAFF COMMENTS AND RECOMMENDATIONS

Board members are requested to review the attached suggested list of “cases served” and “performance measures” and, if desired, provide OSBE Staff guidance on refinement of the list. Board staff will set guidelines for institutions, agencies, special/health programs to submit performance measure reports. Performance measure reports for each institution, agency, and special/health program will be submitted to the board for approval at the August Board meeting.

BOARD ACTION

This item is for informational purposes only. Any action will be at the Board’s discretion.

**Institutions/Agencies under the purview of
the Idaho State Board of Education**

*** Boise State University (BSU)**

- BSU is a public university making the transition to a metropolitan research university.
- Total Expenditures FY07: \$117,192,516
- Key Contact: Dr. Bob Kustra, President

*** *Small Business Development Centers (SBDC)***

- Provides business consulting and training to Idaho's small businesses and entrepreneurs.
- Total Expenditures FY07: \$284,800
- Key Contact: Jim Hogge, Director

*** *Tech Help***

- Is a partnership of Idaho's three universities with a primary mission to provide technical assistance, training, and information to strengthen the competitiveness of Idaho manufacturers, processors, and inventors.
- Total Expenditures FY07: \$219,744
- Key Contact: Michael Wojcicki, Executive Director

*** *Idaho Council on Economic Education***

- Provides materials, workshops, and training in economic and financial literacy education to k-12 teachers and students.
- Total Expenditures FY07: \$54,800
- Key Contact: Leon Maynard, President

*** Idaho State University (ISU)**

- ISU is a publicly supported, research-intensive, doctoral institution of higher education.
- Total Expenditures FY07: \$100,855,000
- Key Contact: Dr. Art Vailas, President

*** *ISU Family Medicine Residency***

- Conducts graduate medical training for physicians pursuing a residency in Family Medicine.
- Total Expenditures FY07: \$1,543,600
- Key Contact: Dr. Jonathan Cree, Director

*** *Idaho Dental Education Program (IDEP)***

- Assists Idaho residents in obtaining a dental education, in cooperation with the Creighton University School of Dentistry in Omaha, Nebraska.
- Total Expenditures FY07: \$1,143,600
- Key Contact: Dr. Jeff Ybarguen, Program Director

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** Museum of Natural History*

- Charged with preserving and interpreting cultural and natural history for the citizens of Idaho.
- Total Expenditures FY07: \$595,500
- Key Contact: Linda T. Deck

***Lewis Clark State College (LCS)**

- LCSC is a public 4-year higher education institution.
- Total Expenditures FY07: \$44,218,700
- Key Contact: Dr. Dene Thomas, President

***University of Idaho (UI)**

- UI is a high research activity, land-grant institution committed to undergraduate and graduate research education.
- Total Expenditures FY07: \$133,866,500
- Key Contact:

** WOI Veterinary Medicine*

- Idaho and Washington cooperative program to provide training for the Doctor of Veterinary Medicine.
- Total Expenditures FY07: \$1,774,100
- Key Contact: Carl Hunt, Department Head

** WWAMI Medical Education*

- Cooperative program between University of Washington Medical School and UI to provide Idaho students opportunity to train for a Medical Degree.
- Total Expenditures FY07: \$3,506,466
- Key Contact: Dr. Andrew Turner

** Agricultural Research and Extension*

- Conducts educational outreach programs to improve the quality of life of Idaho citizens through educating, by helping them apply the latest scientific technology to their communities, businesses, lives, and families.
- Total Expenditures FY07: \$31,634,884
- Key Contact: Cherryl Sodorff, Director

** Forest Utilization Research*

- Researches forestry, forest nursery, and related areas.
- Total Expenditures FY07: \$603,400
- Key Contact: Steven Daley-Laursen, Dean

** Idaho Geological Survey*

- Lead state agency for the collection, interpretation, and dissemination of geologic and mineral data for Idaho.
- Total Expenditures FY07: \$824,400
- Key Contact: Roy Breckenridge, Director

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*** College of Southern Idaho (CSI)**

- CSI is a comprehensive community college with a mission to provide educational, social, and cultural opportunities to the diverse population of South Central Idaho.
- Total Expenditures FY07: \$25,684,200
- Key Contact: Jerry Beck, President

*** North Idaho College (NIC)**

- NIC is a comprehensive community college that provides a wide array of academic, professional technical, and workforce training programs.
- Total Expenditures FY07: \$28,500,500
- Key Contact: Dr. Pricilla Bell, President

*** College of Western Idaho (CWI)**

- CWI is a newly established comprehensive community college that will provide education and training programs to the population of Southern Idaho.
- Total Expenditures FY07: *not available*
- Key Contact: Dennis Griffin, President

*** Eastern Idaho Technical College (EITC)**

- EITC provides high quality educational programs that focus on the needs of the community.
- Total Expenditures FY07: \$9,949,980
- Key Contact:

*** Office of the State Board of Education (OSBE)**

- OSBE provides staff support to the Board of Education to facilitate Board governance and oversight of all Board governed agencies, institutions, health and special programs.
- Total Expenditures FY07: 10,877,300
- Key Contact: Dr. Mike Rush, Executive Director

*** *Scholarships and Grants***

- Administers a variety of scholarships, grant, and work-study opportunities prescribed in state statute.
- Total Expenditures FY07: \$7,391,800
- Key Contact: Dana Kelly

*** *Western Interstate Commission for Higher Education (WICHE)***

- Helps Idaho residents enroll in out of state professional programs. Currently, Idaho participates in the field of Optometry.
- Total Expenditures FY07: \$220,000
- Key Contact: Dana Kelly

- * *University of Utah (medical education)*
 - Provides Idaho students with opportunity to receive four years of medical training through the University of Utah School of Medicine.
 - Total Expenditures FY07: \$1,006,700
 - Key Contact: DeVon Hale

- * *University of Washington – Boise Family Medicine Residency*
 - Provides graduate medical education in Family Medicine and is affiliated with the University of Washington WWAMI Residency Network.
 - Total Expenditures FY07: \$1,543,600
 - Key Contact: Dr. Ted Epperly

- * *Advanced Clinician Psychiatry Residency Track*
 - The psychiatry residency program offered through the University of Washington cooperation with the Boise Veterans Affairs Medical Center, St. Alphonsus Regional Medical Center, and St. Luke's Health System.
 - Total Expenditures FY07: *not available*
 - Key Contact: Leslie Miracle

- * **Division of Professional Technical Education (IDPTE)**
 - IDPTE is the state's primary educational delivery system for preparing Idaho's workforce. Programs are integrated into a larger educational structure through public school districts, colleges, and universities.
 - Total Expenditures FY07: \$59,215,700
 - Key Contact: Ann Stevens,

- * **Idaho Commission for Libraries (ICL)**
 - ICL provides library education and consultant services, coordinates statewide library programs, and administers grant programs for library development.
 - Total Expenditures FY07: \$4,378,000
 - Key Contact: Ann Joslin, State Librarian

- * **Idaho Public Television (IPTV)**
 - IPTV establishes a statewide television delivery system to provide quality educational, informational, and cultural television and related sources.
 - Total Expenditures FY07: \$3,191,200
 - Key Contact: Peter Morrill, General Manager

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*** Idaho School for the Deaf and the Blind (ISDB)**

- ISDB provides quality education to children from birth to 21 years of age who are hearing impaired or visually impaired to the extent that they cannot receive proper education in the public school system.
- Total Expenditures FY07: \$8,254,600
- Key Contact: Mary Dunne, Director

*** Idaho State Historical Society (ISHS)**

- ISHS preserves and promotes Idaho's cultural heritage.
- Total Expenditures FY07: \$4,228,800
- Key Contact: Janet Gallimore, Director

*** Idaho Division of Vocational Rehabilitation (IDVR)**

- IDVR provides management of state/federal vocational rehabilitation programs, the state Renal Disease Program and extended employment services, while also serving as a flow-through agency for funding the state Epilepsy Program.
- Total Expenditures FY07: \$23,941,000
- Key Contact: Dr. Michael Graham, Administrator

*** State Department of Education (SDE) - *Exempt***

** Idaho Public Schools*

- The State Department of Education partners with independent school districts to ensure all students receive an education that prepares students for successful postsecondary education, employment, and life.
- Total Expenditures FY07: \$
- Key Contact: Luci Willits, Chief of Staff

**Proposed Cases Served & Performance Measures for
Agencies, Institutions, Health, & Special Programs**

Boise State University (BSU)

- *Cases Served*
 - Enrollment Headcount
(Professional/Graduate/Undergraduate/Professional Technical)
 - Enrollment FTE (Professional/Graduate/Undergraduate/Professional Technical)
 - Student Faculty ratio per FTE
 - Credit Hours Taught
 - ◆ Main Campus (Professional/Graduate/Undergraduate/Professional Technical)
 - ◆ Remote to Main Campus (Professional/ Graduate/Undergraduate/ Professional Technical)
 - Number of transfer students from accredited Idaho institutions
 - Dual Credit Enrollment
 - ◆ Taught by a High School Teacher: Annual Unduplicated Headcount and Total Annual Credit Hours
 - ◆ Taught by a College Professor; Annual Unduplicated Headcount and Total Annual Credit Hours
- *Performance Measures*
 - Institutional faculty total compensation as a percent of peer organizations
 - Instructional Dollars per Student FTE (Academic/Professional Technical)
 - Scholarship Dollars per Student FTE (Academic/Professional Technical)
 - Average need-based loans for full-time, resident, undergraduate or professional technical students, as a percent of full-time resident, undergraduate or professional technical total cost of attendance for FAFSA eligibility
 - Full-time Freshman (degree seeking) Retention Rate
 - Number of full-time, first time students from the cohort of new first year students who complete their program within 1 ½ times the normal program length
 - Externally Funded Grant and Contract Dollars per Faculty FTE
 - Degrees/Certificates Awarded
(Professional/Graduate/Undergraduate/Professional Technical)

Idaho State University (ISU)

- *Cases Served*
 - Enrollment Headcount
(Professional/Graduate/Undergraduate/Professional Technical)
 - Enrollment FTE (Professional/Graduate/Undergraduate/Professional Technical)
 - Student Faculty ratio per FTE
 - Credit Hours Taught

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- ♦ Main Campus (Professional/Graduate/Undergraduate/Professional Technical)
- ♦ Remote to Main Campus (Professional/Graduate/Undergraduate/Professional Technical)
- Number of transfer students from accredited Idaho institutions
- Dual Credit Hours
 - ♦ Taught by a High School Teacher: Annual Unduplicated Headcount and Total Annual Credit Hours
 - ♦ Taught by a College Professor; Annual Unduplicated Headcount and Total Annual Credit Hours
- *Performance Measures*
 - Institutional faculty total compensation as a percent of peer organizations
 - Instructional Dollars per Student FTE (Academic/Professional Technical)
 - Scholarship Dollars per Student FTE (Academic/Professional Technical)
 - Average need-based loans for full-time, resident, undergraduate or professional technical students, as a percent of full-time resident, undergraduate or professional technical total cost of attendance for FAFSA eligibility
 - Full-time Freshman (degree seeking) Retention Rate
 - Number of full-time, first time students from the cohort of new first year students who complete their program within 1 ½ times the normal program length
 - Externally Funded Grant and Contract Dollars per Faculty FTE
 - Degrees/Certificates Awarded (Professional/Graduate/Undergraduate/Professional Technical)

Lewis-Clark State College (LCSC)

- *Cases Served*
 - Enrollment Headcount (Professional/Undergraduate/Professional Technical)
 - Enrollment FTE (Professional/Undergraduate/Professional Technical)
 - Student Faculty ratio per FTE
 - Credit Hours Taught
 - ♦ Main Campus (Professional/Undergraduate/Professional Technical)
 - ♦ Remote to Main Campus (Professional/Undergraduate/Professional Technical)
 - Number of transfer students from accredited Idaho institutions
 - Dual Credit Hours
 - ♦ Taught by a High School Teacher: Annual Unduplicated Headcount and Total Annual Credit Hours
 - ♦ Taught by a College Professor; Annual Unduplicated Headcount and Total Annual Credit Hours
- *Performance Measures*
 - Institutional faculty total compensation as a percent of peer organizations
 - Instructional Dollars per Student FTE (Academic/Professional Technical)
 - Scholarship Dollars per Student FTE (Academic/Professional Technical)

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- Average need-based loans for full-time, resident, undergraduate or professional technical students, as a percent of full-time resident, undergraduate or professional technical total cost of attendance for FAFSA eligibility
- Full-time Freshman (degree seeking) Retention Rate
- Number of full-time, first time students from the cohort of new first year students who complete their program within 1 ½ times the normal program length
- Externally Funded Grant and Contract Dollars per Faculty FTE
- Degrees/Certificates Awarded (Professional/Undergraduate/Professional Technical)

University of Idaho (UI)

- *Cases Served*
 - Enrollment Headcount (Professional/Graduate/Undergraduate)
 - Enrollment FTE (Professional/Graduate/Undergraduate)
 - Student Faculty ratio per FTE
 - Credit Hours Taught
 - ◆ Main Campus (Professional/Graduate/Undergraduate)
 - ◆ Remote to Main Campus (Professional/Graduate/Undergraduate)
 - Number of transfer students from accredited Idaho institutions
 - Dual Credit Hours
 - ◆ Taught by a High School Teacher: Annual Unduplicated Headcount and Total Annual Credit Hours
 - ◆ Taught by a College Professor; Annual Unduplicated Headcount and Total Annual Credit Hours
- *Performance Measures*
 - Institutional faculty total compensation as a percent of peer organizations
 - Instructional Dollars per Student FTE
 - Scholarship Dollars per Student FTE
 - Average need-based loans for full-time, resident, undergraduate or professional technical students, as a percent of full-time resident, undergraduate or professional technical total cost of attendance for FAFSA eligibility
 - Full-time Freshman (degree seeking) Retention Rate
 - Number of full-time, first time students from the cohort of new first year students who complete their program within 1 ½ times the normal program length
 - Externally Funded Grant and Contract Dollars per Faculty FTE
 - Degrees Awarded (Professional/Graduate/Undergraduate)

North Idaho College (NIC)/College of Southern Idaho(CSI)/College of Western Idaho (CWI)

- *Cases Served*
 - Enrollment Headcount (Undergraduate/Professional Technical)
 - Enrollment FTE (Undergraduate/Professional Technical)

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
JUNE 19-20, 2008

- Student Faculty ratio per FTE
- Credit Hours Taught
 - ◆ Main Campus (Undergraduate/Professional Technical)
 - ◆ Remote to Main Campus (Undergraduate/Professional Technical)
- Dual Credit Hours
 - ◆ Taught by a High School Teacher: Annual Unduplicated Headcount and Total Annual Credit Hours
 - ◆ Taught by a College Professor; Annual Unduplicated Headcount and Total Annual Credit Hours
- Workforce Training (non-credit/specialized training contact hours)
- Courses or programs started in response to community and workforce needs
- *Performance Measures*
 - Institutional faculty total compensation as a percent of peer organizations
 - Instructional Dollars per Student FTE (Academic/Professional Technical)
 - Scholarship Dollars per Student FTE (Academic/Professional Technical)
 - Retention of new first-time, full-time degree seeking student to the second year or to program completion, if the vocational-technical program is less than one year
 - Degrees/Certificates Awarded (Undergraduate/Professional Technical)
 - Percentage of total high school graduates in the service area enrolling at institution

Eastern Idaho Technical College (EITC)

- *Cases Served*
 - Enrollment Headcount (Professional Technical)
 - Enrollment FTE (Professional Technical)
 - Student Faculty ratio per FTE
 - Credit Hours Taught
 - ◆ Main Campus (Professional Technical)
 - ◆ Remote to Main Campus (Professional Technical)
 - Dual Credit Hours
 - ◆ Taught by a High School Teacher: Annual Unduplicated Headcount and Total Annual Credit Hours
 - ◆ Taught by a College Professor; Annual Unduplicated Headcount and Total Annual Credit Hours
 - Workforce Training (non-credit/specialized training contact hours)
- *Performance Measures*
 - Institutional faculty total compensation as a percent of peer organizations
 - Instructional Dollars per Student FTE (Professional Technical)
 - Scholarship Dollars per Student FTE (Professional Technical)
 - Full-time Freshman (degree/certificate seeking) Retention Rate
 - Degrees/Certificates Awarded (Professional Technical)

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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Office of the State Board of Education (OSBE)

- *Cases Served*
 - Number of Agencies/Institutions/Special Programs Approximate FTE Overseen/Governed by the Board with Board Staff Support
 - Total Dollar Value of Appropriated State/Federal Funds Regulated by the Board with Board Staff Support
 - Number of Student Learners in K-12/Postsecondary Programs Approved and Administered by the Board with Board Staff Support
 - Number of K-12 Student Assessments Administered/Supervised by Board Staff
 - Number/Total Dollar Value of Scholarships Administered by Board Staff
- *Performance Measures*
 - Board Staff FTE as a Percentage of Total Board Governed Agency/Institution FTEs
 - Number of New/Modified/Eliminated Academic Programs Reviewed and/or Evaluated and Processed for Board Approval
 - Board Staff Personnel Cost/Operating Expenditures as a Percentage of Personnel Cost/Operating Expenditures of all Board Governed Agencies/Institutions
 - Number of Users/Downloads from Board Website
 - Administrative Cost of Scholarship Programs/Percentage of Total Scholarship Dollars

Idaho Division of Professional-Technical Education (IDPTE)

- *Cases Served*
 - Number of Students in Leadership Development Organizations (Secondary and Postsecondary) Served
 - Number of Students Enrolled in High School PTE Programs
 - Number of Students Enrolled in Postsecondary PTE Programs
 - Number of Adults Enrolled in Upgrade and Customized Training
 - Number of Adults Served in the Unprepared Program
- *Performance Measures*
 - Agency personnel (key personnel) total compensation as a percent of peer organizations
 - Number/Percentage of minority students enrolled in secondary/postsecondary programs
 - Number/Percentage of Secondary Tech Prep Students Enter Postsecondary PTE Programs
 - Number/Percentage of Students Completing Secondary PTE Programs Who Achieve a Positive Placement or Transition in Postsecondary Education or Advanced Training, Military Service or Employment
 - Number/Percentage of Students Completing Postsecondary PTE Programs Who Achieve a Positive Placement or Transition in Postsecondary Education or Advanced Training, Military Service or Employment

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- Number/Percentage of Teachers Completing a Professional Development Activity During the Year

Idaho Commission for Libraries (ICL)

- *Cases Served*
 - LiLI Databases Sessions/Logins
 - LiLI Databases Full Text Views
 - Statewide Attendance At Public Libraries
 - Number of Talking Book Service Patrons
 - Continuing Library Education/Events Sponsored/Participants
- *Performance Measures*
 - Agency personnel (key personnel) total compensation as a percent of peer organizations
 - Number/Dollar Value of Library Grants Administered
 - Percentage of Idaho Citizens Who Identify Libraries as Important
 - Percentage of LiLI Unlimited Participating Libraries
 - Number of Registrations at Summer Reading Programs
 - Value of LiLI Database Licenses Compared to Cost if Purchased Separately

Idaho Public Television (IPTV)

- *Cases Served*
 - Number/Percentage of Children Under 12 Years of Age Viewing IPTV
 - Channel Hours of Programming for Children as a Percentage of Total Program Hours
 - Number/Percentage of Children and Adults Age 12-49 Viewing IPTV
 - Number/Percentage of Adults 50 or More Years of Age Viewing IPTV
 - Closed Captioned Program Hours as a Percentage of Total Program Hours
 - Descriptive Video Service Hours as a Percentage of Total Program Hours
 - Channel Hours for Learners as a Percentage of Total Program Hours
 - Public Affairs Channel Hours as a Percentage of Total Program Hours
 - Number of viewers/downloads of Idahoptv.org
- *Performance Measures*
 - Agency personnel (key personnel) total compensation as a percent of peer organizations
 - Absolute Dollar Value of the IPTV Operating Budget Not Covered by Direct State Appropriations
 - Total IPTV Viewing Audience as a Percentage of Viewing Population
 - Number and Percentage of the State's Population Unable to Receive IPTV Free Over-The-Air Broadcasts On Their Televisions
 - Total Number of Viewers Per Week

Idaho School for the Deaf and Blind (ISDB)

- *Cases Served*
 - Resident Enrollment (visually impaired/hearing impaired/Multi-handicap)

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- Students Served by Each Regional Outreach Office (Visually Impaired/Hearing Impaired)
- Number of School Districts (As a Percent of Total) Receiving Services (Visually Impaired/Hearing Impaired)
- Average Number of Cases (Students Served) per Outreach Consultant (Visually Impaired/Hearing Impaired)
- *Performance Measures*
 - Agency personnel (key personnel) total compensation as a percent of peer organizations
 - Number of Resident Students and Percentage of Students Who Achieve High School Graduation with Their Primary Year Group (Visually Impaired/Hearing Impaired)
 - Number of Students and Percentage of Total (Visually Impaired/Hearing Impaired) Served by Regional Outreach Offices Who Achieve High School Graduation with Their Primary Year Group
 - Number of Students Served (Resident and Non-resident) As a Percent of Total (Visually Impaired/Hearing Impaired) Statewide qualifying School Population

Idaho State Historical Society (ISHS)

- *Cases Served*
 - Public Archives/Research Library Patrons Served
 - Number of (K-12) Students Receiving Educational Materials from the Historical Museum
 - Number of Daily User Sessions on Agency Internet Website
 - State Historic Preservation Office Review of Environmental Impact Clearances
 - General Tour Visitations to museum and ISHS Historic Sites Statewide
 - Number of Students Participating in Idaho History Day Contest
- *Performance Measures*
 - Agency personnel (key personnel) total compensation as a percent of peer organizations
 - Grant Dollars as a Percentage of Total Expenditures
 - Percentage of State Records Updated/Preserved/Available Electronically
 - Oral History Interview and Related Materials Created
 - Number of Paid Visitors to the Historical Museum and Old Penitentiary

State Department of Education (SDE)

- *Cases Served*
 - Number of School Districts Supported
 - Number of Public School District Students K-12
 - Number of K-12 Students Home Schooled
 - Number of K-12 Charter Schools
 - FTE Student Teacher Ratio
- *Performance Measures*

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- Agency personnel (key personnel) total compensation as a percent of peer organizations
- Number/Percentage of Students Completing High School
- Percentage of 8th Graders Scoring Proficient or Better on NAEP
- Number of Highly Qualified Teachers Teaching in Their Area of Specialty as a Percentage of The Total Teaching Population
- Percentage of K-12 Students Meeting or Exceeding ISAT
- Number of 3rd Graders Reading at or Above Grade Level
- Number of Schools Receiving Technical Assistance

Idaho Division of Vocational Rehabilitation (IDVR)

- *Cases Served*
 - Number of Individuals Served by Vocational Rehabilitation
 - Number of Individuals With Chronic Renal Failure Supported
 - Number of Individuals With Epilepsy/Seizure Disorders Served Through the Epilepsy Foundation of Idaho
- *Performance Measures*
 - Agency personnel (key personnel) total compensation as a percent of peer organizations
 - Number/Percentage of Individuals Exiting the VR Program Who Achieved an Employment Outcome
 - Average Hourly Earnings of Served Individuals Going to Work
 - Average Number of Individual Served per Rehabilitation Counselor
 - The Service Rate of All Individuals With Disabilities
 - The Service Rate of All Individuals With Disabilities From Minority Backgrounds as Compared to all Non-Minority Individuals with Disabilities
 - Number of Individuals With Disabilities from the Adult Corrections population exiting the VR Program Who Achieved an Employment Outcome

Boise State University (Special Programs)

*** Small Business Development Centers (SBDC)**

- *Cases Served*
 - Number of Small Business Receiving Consulting
 - Average Hours of Consulting Per Client
 - Number of Small Business Trained
 - Number of Individuals Trained
- *Performance Measures*
 - Average Employment Growth of SBDC Clients as a Percent of All Idaho Small Business Employment Growth
 - Average Sales Growth of SBDC Clients as a Percent of Sales Growth of All Idaho Small Business Sales Growth
 - Additional State Tax Revenue Generated as a Percent of Total SBDC Cost
 - Total SBDC Client Employment Growth/Jobs Saved

*** Tech Help**

- *Cases Served*
 - Number of Clients Requesting Services at Each Office Location/Percentage Receiving Tech Help Services
 - Average Cost per Impacted Client
- *Performance Measures*
 - Number of Jobs Created or Retained
 - Customer Satisfaction Score (Scale of 1-5)

*** Idaho Council on Economic Education (ICEE)**

- *Cases Served*
 - Teachers Receiving Training in Economic/Financial Education
 - Students Participating in Economic/Financial Programs by Center
- *Performance Measures*
 - Percentage of Eligible Students Participating in Economic/Financial Programs
 - Number and Dollar Value of External Grants Supporting the Programs
 - Number of Community Volunteers Supporting the Program

Idaho State University (Health & Special Programs)

*** ISU Family Medicine Residency**

- *Cases Served*
 - Number of Residents in Training
 - Average Total State Funded Dollar Cost per Resident as a Percent of Total Residency Training Costs
 - Number of Students (non Physician) Receiving Clinical Training/ Number of Health Profession Disciplines at FMR Facilities
 - Number of Indigent Patients Served in Pocatello and Boise
- *Performance Measures*
 - Number/Percentage of Physician Residents Graduating
 - Percentage of Graduates Successfully Completing Board Examination
 - Number/Percentage of Resident Training Graduates Practicing in Idaho
 - Number and Dollar Value of Residency Grants

*** Idaho Dental Education Program (IDEP)**

- *Cases Served*
 - Number of Program Applicants, Number/Percent Accepted
 - Number of Graduates (Since Program Inception)
- *Performance Measures*
 - Pass Rate On WREB or CRDTS Exam
 - Average Cost per Student
 - Number of Graduates Returning to Idaho
 - Number of Graduates (Since Program Inception)/Percentage Practicing in Idaho

*** Museum of Natural History**

- *Cases Served*
 - Number of General Public Visitors
 - Educational Programs for Public Audiences
 - K-12 Students on Class Tours
- *Performance Measures*
 - Professional Papers Presented
 - Grant Revenue Received
 - Exhibitions Developed/Presented at outreach locations from the Museum
 - Number of Collection Items Stored in the Museum (objects in IMNH collections)

University of Idaho (Health & Special Programs)

*** WOI Veterinary Medicine**

- *Cases Served*
 - Number of Idaho Residents Enrolled Each Year
 - Number of One Month Student Rotation Teaching Blocks Offered per Year at the Canine Veterinary Teaching Center (CVTC) in Caldwell
 - Accepted Clinical Hospital Referral Cases
 - Accepted Veterinary Diagnostic Cases
- *Performance Measures*
 - Number and Percentage of Senior Students Selecting Elective Rotations at the CVTC
 - Number/Percentage of Idaho Resident New Graduates Licensed to Practice Veterinary Medicine in Idaho
 - Number of Disease Investigations Conducted by CVTC Faculty
 - Number/Dollar Value of Grants/Contracts by WOI Faculty Members

*** WWAMI Medical Education**

- *Cases Served*
 - Number and Percentage of Graduates Practicing in Idaho
 - Total Number of Students Participating
 - Number of Idaho Students Applying for UW Medical School/Average GPA/Average MCAT Score
 - Number of Idaho Students Admitted to UW Medical School/Percentage Supported by WWAMI Funding
 - Average GPA and MCAT Score of Admitted Students
- *Performance Measures*
 - Number of Idaho WWAMI Applicants per Year/Ratio of Idaho Applicants per Seat
 - Pass Rate on U.S. Medical Licensing Examination
 - Number of WWAMI Rural Idaho Summer Medical Student Placements per Year
 - Percentage of Idaho WWAMI Graduates Choosing Primary Care Specialties for Residency Training

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- Number/Percentage of Idaho WWAMI Graduates Currently Practicing in Idaho

*** Agricultural Research and Extension**

- *Cases Served*
 - Number/Percent of Youth Participating in 4-H
 - Number of Technical Publication (Research Results) Generated/Revised
 - Number of Individuals/Families Benefiting from Outreach Programs
- *Performance Measures*
 - Number and Dollar Value of External Agricultural Research Grants
 - Number/Type of New Commercial Crop Varieties Developed

*** Forest Utilization Research**

- *Cases Served*
 - Workshops/Tours Conducted and Average Number of Attendees
 - Number of Invited Presentation and Average Number of Attendees
 - Number of Research/Teaching/Service Projects
 - Number of Private Landowners Assisted
 - Number of Seedling Industry Research Projects
- *Performance Measures*
 - Research Studies Completed/Published

*** Idaho Geological Survey**

- *Cases Served*
 - Square Miles of Geological Mapping
 - Number of Miners/Industry Supervisors Trained/Certified in Safety
 - Number of Mine Property Files Converted to Digital Form
 - Number of Statewide Educational Events/Programs for Public Audiences
 - Number of Website Viewers
- *Performance Measures*
 - Agency Research Faculty Total Compensation as a Percent of Peers
 - Externally Funded Grant and Contract Dollars
 - Number of Website Products Used
 - Number of Published Reports on Geology/Hydrology/Hazards/Mineral Resources
 - Cumulative Percent of Idaho's area covered by Modern Geologic Mapping

Office of the State Board of Education (Health & Special Programs)

*** Scholarships and Grants**

- *Cases Served (Number of Students and Average Expenditure Per Student)*
 - Idaho Promise A
 - Idaho Promise B
 - Work Study Program
 - Minority/ At Risk
 - Teacher/Nurse Loan Forgiveness
 - Peace Officer/Fire Fighter

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- Grow Your Own Teacher
- Leveraging Educational Assistance
- Special Leveraging Educational Assistance
- POW/MIA
- Byrd Honors
- *Performance Measures*
 - Percentage of Minority Students/Secondary Completers Continuing to Post Secondary Education
 - Percentage of all Secondary Completers Continuing to Post Secondary Education
 - Percentage of Eligible Applicants Served
 - Number of Highly Qualified Applicants Receiving Scholarships
 - Percentage of Scholarship Money Compared to Total Cost of College

*** Western Interstate Commission for Higher Education (WICHE)**

- *Cases Served*
 - Number of Students Enrolled by Professional Program
 - Number of Students Receiving Professional Degree/Certification
- *Performance Measures*
 - Average Support Expenditure Per Student
 - Number and Percentage of Students Receiving Professional Degree/Certification Providing Services in Idaho

*** University of Utah**

- *Cases Served*
 - Number of Students and Average Expenditure per Student
 - Number of Idaho Students Applying for UU Medical School/Average GPA/Average MCAT Score
 - Number of Idaho Students Admitted to UU Medical School/Percentage Supported by State Funding
 - Average GPA and MCAT Score of Admitted Students
- *Performance Measure*
 - Total Number of Medical Students and Residents Trained at Utah Practicing in Idaho
 - Number of Students Participating in the Summer Shadowing Program
 - Number of Idaho UU Medical School Applicants per Year/Ratio of Idaho Applicants per State Funded Seat
 - Pass Rate on U.S. Medical Licensing Examination

*** University of Washington Family Medicine Residency (Boise)**

- *Cases Served*
 - Number of Residents in Training
 - Number of Qualified Applicants/Percent Accepted
 - Number of Rural Idaho Rotations in Family Medicine
- *Performance Measures*
 - Rate of Successful Completion on Board of Medicine Examination

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
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- Number/Percentage of Graduates Practicing in Idaho
- Dollar Value/Percentage of Funding External to State Appropriations
- Number of Resident Graduates

Idaho State Board of Education

GOVERNING POLICIES AND PROCEDURES

SECTION: I. GENERAL GOVERNING POLICIES AND PROCEDURES

SUBSECTION: M. Annual Planning and Reporting

August 2006

2. Performance Measures

Performance measures will be developed in conjunction with the Board's planning process and will be updated annually for Board approval. Performance measures will be used to measure results, ensure accountability, and encourage continuous improvement to meet goals and objectives.

- a. Postsecondary institutions will develop a set of uniform performance measures that will gauge progress in such areas as enrollment, retention, and graduation.
- b. Each institution, agency and the school will develop unique measures tied to its strategic plan.

PLANNING, POLICY & GOVERNMENTAL AFFAIRS
JUNE 19-20, 2008

TITLE 67
STATE GOVERNMENT AND STATE AFFAIRS
CHAPTER 19
STATE PLANNING AND COORDINATION

67-1901. PURPOSES. The purposes of sections 67-1901 through 67-1905, Idaho Code, are to generate state agency planning and performance information that can be used to:

- (1) Improve state agency accountability to state citizens and lawmakers;
- (2) Increase the ability of the legislature to assess and oversee agency performance;
- (3) Assist lawmakers with policy and budget decisions; and
- (4) Increase the ability of state agencies to improve agency management and service delivery and assess program effectiveness.

67-1902. DEFINITIONS. For purposes of sections 67-1901 through 67-1905, Idaho Code:

- (1) "Agency" means each department, board, commission, office and institution, educational or otherwise, except elective offices, in the executive department of state government. "Agency" does not include legislative and judicial branch entities.
- (2) "Benchmark" or "performance target" means the agency's expected, planned or intended result for a particular performance measure. This information may come from an accepted industry standard for performance or from an agency's careful study, research and/or analysis of the circumstances impacting performance capabilities.
- (3) "Core function" means a group of related activities serving a common end of meeting the main responsibilities of the agency.
- (4) "Goal" means a planning element that describes the broad condition, state or outcome an agency or program is trying to achieve.
- (5) "Major division" means an organizational group within the agency that focuses on meeting one (1) or more of the agency's primary statutory responsibilities.
- (6) "Objective" means a planning element that describes a specific condition, state or outcome that an agency or program is trying to achieve as a step toward fulfilling its goals.
- (7) "Performance measure" means a quantifiable indicator of an agency's progress toward achieving its goals.

67-1903. STRATEGIC PLANNING. (1) Each state agency shall develop and submit to the division of financial management a comprehensive strategic plan for the major divisions and core functions of that agency. The plan shall be based upon the agency's statutory authority and, at a minimum, shall contain:

- (a) A comprehensive outcome-based vision or mission statement covering major divisions and core functions of the agency;
- (b) Goals for the major divisions and core functions of the agency;
- (c) Objectives and/or tasks that indicate how the goals are to be achieved;
- (d) Performance measures, developed in accordance with section 67-1904, Idaho Code, that assess the progress of the agency in meeting its goals in the strategic plan, along with an indication of how the performance measures are related to the goals in the strategic plan;
- (e) Benchmarks or performance targets for each performance measure for,

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at a minimum, the next fiscal year, along with an explanation of the manner in which the benchmark or target level was established; and

(f) An identification of those key factors external to the agency and beyond its control that could significantly affect the achievement of the strategic plan goals and objectives.

(2) The strategic plan shall cover a period of not less than four (4) years forward including the fiscal year in which it is submitted, and shall be updated annually.

(3) The strategic plan shall serve as the foundation for developing the annual performance information required by section 67-1904, Idaho Code.

(4) When developing a strategic plan, an agency shall consult with the appropriate members of the legislature, and shall solicit and consider the views and suggestions of those persons and entities potentially affected by the plan. Consultation with legislators may occur when meeting the requirement of section 67-1904(7), Idaho Code.

(5) Strategic plans are public records and are available to the public as provided in section 9-338, Idaho Code.

67-1904. PERFORMANCE MEASUREMENT. (1) Every fiscal year, as part of its budget request, each agency shall prepare an annual performance report. The report shall be comprised of two (2) parts:

(a) Part I shall contain basic profile information for the prior four (4)

fiscal years including statutory authority, fiscal year revenue and expenditure information and any informative breakdowns such as amounts from different revenue sources, types of expenditures, and data about the number and types of cases managed and/or key services provided to meet agency goals.

(b) Part II shall contain:

(i) Not more than ten (10) key quantifiable performance measures, which clearly capture the agency's progress in meeting the goals of its major divisions and core functions stated in the strategic plan required in section 67-1903, Idaho Code. The goal(s) and strategies to which each measure corresponds shall also be provided. More measures may be requested by the germane committee chairs through the process set forth in subsection (7) of this section.

(ii) Results for each measure for the prior four (4) fiscal years. In situations where past data is not available because a new measure is being used, the report shall indicate the situation.

(iii) Benchmarks or performance targets for each measure for, at a minimum, the next fiscal year, and for each year of the four (4) years of reported actual results.

(iv) Explanations, where needed, which provide context important for understanding the measures and the results, and any other qualitative information useful for understanding agency performance.

(v) Attestation from the agency director that the data reported has been internally assessed for accuracy, and, to the best of the director's knowledge, is deemed to be accurate.

(2) Each agency performance report shall be presented in a consistent format, determined by the division of financial management, which allows for easy review and understanding of the information reported.

(3) Each agency shall review the results of the performance measures compared to benchmarks or performance targets and shall use the information for internal management purposes.

(4) Each agency shall maintain reports and documentation that support the data reported through the performance measures. This information shall be

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maintained and kept readily available for each of the four (4) years covered in the most recent performance report.

(5) The performance report shall be submitted by the agency to the division of financial management and the budget and policy analysis office of the office of legislative services by September 1 of each year. In fiscal year 2006, agencies shall submit part I of the performance report required by subsection (1)(a) of this section no later than November 1, and are exempt from submitting part II of the performance report required by subsection (1)(b) of this section. In accordance with section 67-3507, Idaho Code, agency performance reports shall be published each year as part of the executive budget document.

(6) The office of budget and policy analysis of the office of legislative services may incorporate all or some of the information submitted under this section in its annual legislative budget book.

(7) Each agency shall orally present the information from the performance report to its corresponding senate and house of representatives germane committees each year unless a germane committee elects to have an agency present such information every other year. The presentations shall consist of a review of agency performance information and shall provide an opportunity for dialogue between the agency and the committees about the sufficiency and usefulness of the types of information reported. Following any discussion about the information reported, the germane committees, in accordance with the requirements of this section, may request any changes to be made to the types of information reported. In fiscal year 2006, each agency shall be required only to present part I of the performance report required in subsection (1)(a) of this section and, at a minimum, a progress report on the implementation of part II of the performance report as set forth in subsection (1)(b) of this section.

(8) If an agency and its corresponding germane committees determine that it is not feasible to develop a quantifiable measure for a particular goal or strategy, the germane committees may request an alternative form of measurement.

(9) The senate and the house of representatives germane committees should attempt to meet jointly to hear and discuss an agency's performance report and achieve consensus regarding the types of measures to be reported.

67-1905. TRAINING. Strategic planning and performance measurement training shall be held for both state agencies and lawmakers as follows:

(1) The division of financial management shall coordinate training for key agency personnel on the development, use and reporting of strategic planning and performance measurement information. The training shall be integrated into current agency training programs and shall be offered and required for agency staff at a frequency determined by the division of financial management.

(2) The office of performance evaluations and the office of budget and policy analysis of the office of legislative services shall coordinate training for legislators on the development and use of strategic planning and performance measurement information. The training shall be offered at least once every two (2) years to coincide with new legislative terms.

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SUBJECT

Legislation for the 2009 Legislative Session

BACKGROUND

As an agency of the Governor, the State Board of Education is required to submit electronically all proposed legislation to the Division of Financial Management (DFM) for the Governor's approval. The Board's approval of these Legislative Ideas is the first step in the process. If approved by the Board and the Governor, the actual legislative language will be brought back to the Board at their October Board meeting for final approval.

DISCUSSION

The following are descriptive summaries of the four (4) pieces of legislation being proposed:

Clarify Procedures the Board Takes After Approving Consolidation, Deconsolidation, and Boundary Change Requests

This legislation will provide for consistency in the procedures the State Board of Education must take after a proposal for district consolidation, deconsolidation, or boundary changes is approved by voters. Procedures presently outlined are varied, vague, and are not aligned to each other.

Highly Qualified Rehabilitation Student Loan Forgiveness Program

The Idaho Division of Vocation Rehabilitation (IDVR) purposes a student loan repayment program to assist with recruitment and retention efforts of highly qualified Rehabilitation Counselors. IDVR in recent years has encountered a number of barriers in recruiting and retaining qualified professional counselors. Current barriers include; a number of staff nearing retirement age, nationwide shortage of university trained professionals, lower wages compared to neighboring states and the private sector and the rural nature of our state.

Based on available funding, IDVR would assist those professional counselors that have Federal student loan debt by paying a portion of their student loan payments for the duration of their loan not to exceed 10 years. The program would consist of the agency paying a portion of the loan payments once the qualified employee has worked for the agency for five (5) years. IDVR will not be requesting additional funds for this program.

The College Cost Reduction and Access Act of 2007, a bill signed by President Bush, establishes a new public service loan forgiveness program. This program discharges any remaining debt (interest and principle) after an individual serves 10 years of full time employment in public service. The forgiveness occurs after 120 monthly payments have been made on or after October 1, 2007. Public service jobs include those that provide services for individuals with disabilities such as Rehabilitation Counseling professionals. The program we purpose would coincide with this program. By assisting with their monthly payments, staff would benefit

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from a lower more manageable payment and after 10 years of full time service with the Agency any remaining debt would be discharged in accordance with the Act.

Transfer or Convey Title, Rights and Interests in Certain Real and Personal Property

This legislation would codify the State Board of Education's authority to transfer or convey title, rights and interests in real and personal property held by the Board or any entity of public postsecondary education supported in whole or in part by state funds to other public entities without any consideration or payment, if the transfer or conveyance is in the best interest of the public and the governing bodies of the institutions involved have approved the transfer or conveyance.

Proprietary School Registration Surety Bonding

This legislation will revise the current criteria and process for school surety bonding and student tuition recovery funding. These changes are necessary to ensure against loss of tuition previously collected, so that appropriate student reimbursement can be made in the event of a school closure or default. The new language will be easier for students and school administrators to understand and for the state staff to manage and implement. No change to the current staffing level or appropriated funding will be required.

IMPACT

If the Board approves the Legislative Ideas as submitted, staff will continue to move the legislation through the legislative process and will bring the legislative language and amendments to the Board at their October meeting. Legislative Ideas not approved will not be submitted to DFM.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends approval of all four (4) legislative Ideas as presented. Actual legislative language and amendments will be brought back to the Board by the October Board meeting for final approval.

BOARD ACTION

A motion to approve all four (4) legislative ideas as submitted, to direct staff to submit proposals through the Governor's legislative process.

Moved by _____ Seconded by _____ Carried Yes _____ No _____