

**STATE BOARD OF EDUCATION MEETING  
October 17-18, 2012  
Lewis-Clark State College  
Williams Conference Center  
Lewiston, Idaho**



**Wednesday, October 17th, 2012, 1:00 pm, Lewis-Clark State College, Lewis-Clark State College. Williams Conference Center (4<sup>th</sup> Street and 9<sup>th</sup> Avenue)**

**BOARDWORK**

1. Agenda Review / Approval
2. Minutes Review / Approval
3. Rolling Calendar

**PLANNING, POLICY & GOVERNMENTAL AFFAIRS**

- A. Board of Education Performance Measure Report
  - Presentation
- B. Institution and Agency Performance Measure Report
  - Presentation
- C. Research Strategic Plan Performance Measures Report

**EXECUTIVE SESSION (Closed to the Public)**

University of Idaho

- 1&2. I move to go into Executive session pursuant to section 67-2345(1)(c), Idaho code to conduct deliberations ... to acquire an interest in real property which is not owned by a public agency;

**Thursday October 18, 2012, 8:00 a.m., Lewis-Clark State College, Williams Conference Center (4<sup>th</sup> Street and 9<sup>th</sup> Avenue)**

**OPEN FORUM**

**CONSENT AGENDA**

**SDE**

1. Curricular Materials Approval

**IRSA**

2. Idaho State University - Professional-Technical Education Program Discontinuance



## **PLANNING, POLICY & GOVERNMENTAL AFFAIRS**

1. Lewis-Clark State College Report
2. Presidents' Council Report
3. Idaho Division of Vocational Rehabilitation
4. Idaho Digital Learning Academy
5. Scholarship Committee Recommendations
6. 2013 Board Legislation
7. Distinguished Schools/AYG Awards
8. President Approved Alcohol Permits

## **BUSINESS AFFAIRS & HUMAN RESOURCES**

### **Section I – Human Resources**

1. Amendment to Optional Retirement Plan
2. Amendment to Board Policy – Section II.H. – Coaching Personnel, 1<sup>st</sup> Reading
3. Compensation Adjustments for Agency Heads
4. Boise State University – Multi-Year Employment Agreement – Vice President of University Advancement
5. University of Idaho - Multi-Year Employment Agreement –Track & Field and Cross-Country Coach
6. University of Idaho - Multi-Year Employment Agreement –Women's Soccer Coach
7. Amendment to Board Policy – Section II.G. – 1<sup>st</sup> Reading

### **Section II – Finance**

1. FY 2013 Sources and Uses of Funds
2. Amendment to Board Policy – Section V.N. – Grants & Contracts, 1<sup>st</sup> Reading
3. Amendment to Board Policy – Section V.B. – Occupancy Costs, 2<sup>nd</sup> Reading
4. Boise State University – Employee Dependent Fee Waiver
5. Boise State University – University Hotel
6. University of Idaho – Arboretum Easement to Local Utility Provider
7. Performance Based Funding Initiative
8. FY 2014 Capital Budget Requests



## **INSTRUCTION, RESEARCH & STUDENT AFFAIRS**

1. University of Idaho – Second Year Law Program
2. Boise State University – IDoTeach Program
3. Board Policy III.N. and III.V. Statewide Articulation and Associate Degree – 1<sup>st</sup> Reading
4. Board Policy III.AA. Accountability Oversight Committee
5. Board Policy III.AB. Idaho Rural Physician Incentive Program

## **DEPARTMENT OF EDUCATION**

1. Superintendents Update
2. Professional Standards Commission Recommendation
3. ESEA Waiver

If auxiliary aids or services are needed for individuals with disabilities, or if you wish to speak during the Open Forum, please contact the Board office at 334-2270 no later than two days before the meeting. While the Board attempts to address items in the listed order, some items may be addressed by the Board prior to or after the order listed.



1. Agenda Approval

Changes or additions to the agenda

**BOARD ACTION**

**I move to approve the agenda as submitted.**

2. Minutes Approval

**BOARD ACTION**

**I move to approve the minutes from the August 15-16, 2012 Regular Board Meeting, the August 17, 2012 Special Board meeting and the September 14, 2012 Special Board meeting as submitted.**

3. Rolling Calendar

**DISCUSSION/BACKGROUND**

The University of Idaho has requested we amend the date for the February 2013 Regularly scheduled Board meeting to resolve the conflict with the 2013 Lionel Hampton Jazz Festival, scheduled to begin February 20, 2013.

**BOARD ACTION**

**I move to set October 16-17, 2013 as the date and Lewis-Clark State College as the location for the October 2013 regularly scheduled Board meeting and to amend the date for the February 2013 regularly scheduled Board meeting to February 13-14, 2013.**





STATE BOARD OF EDUCATION  
TRUSTEES OF BOISE STATE UNIVERSITY  
TRUSTEES OF IDAHO STATE UNIVERSITY  
TRUSTEES OF LEWIS-CLARK STATE COLLEGE  
BOARD OF REGENTS OF THE UNIVERSITY OF IDAHO  
STATE BOARD FOR PROFESSIONAL-TECHNICAL EDUCATION

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**DRAFT MINUTES  
STATE BOARD OF EDUCATION  
August 15-16, 2012  
Idaho State University  
Pond Student Union Building  
Salmon River Suite  
1065 South Cesar Chavez Avenue  
Pocatello, Idaho**

A regularly scheduled meeting of the State Board of Education was held August 15-16, 2012 at the Idaho State University, Pond Student Union Building in the Salmon River Suite in Pocatello, Idaho.

**Present:**

Don Soltman, Vice President  
Emma Atchley, Secretary  
Richard Westerberg

Milford Terrell  
Bill Goesling  
Tom Luna

**Absent:**

Ken Edmunds, President – phoned in at 1:08 pm on Wednesday  
Rod Lewis – phoned in at 1:00 pm on Wednesday

**Wednesday, August 15, 2012**

The Board met in the Salmon River Suite of the Pond Student Union Building at Idaho State University in Pocatello, Idaho. Board Vice President Don Soltman called the meeting to order at 1:00 pm and welcomed everyone to Pocatello for the meeting. Board President Ken Edmunds and Rod Lewis joined by phone.

**BOARDWORK**

**1. Agenda Review**

**BOARD ACTION**

**M/S (Atchley/Goesling): To approve the agenda as submitted.** The motion carried unanimously.

**2. Minutes Review**

**BOARD ACTION**

**M/S (Atchley/Westerberg): To approve the minutes from the June 20-21, 2012 Regular Board meeting as submitted.** The motion carried unanimously.

**3. Rolling Calendar**

**BOARD ACTION**



**M/S (Atchley/Westerberg): To set August 14-15, 2013 as the date and the Idaho State University as the location for the August 2013 regularly scheduled Board meeting. The motion carried unanimously.** Mr. Terrell expressed concern with the dates and the close proximity to the starting of school. Ms. Bent indicated the dates identified for the August meeting next year are before the start of school and none of the institutions had indicated prior to the meeting that there was a conflict with the date.

## WORK SESSION

### POLICY PLANNING & GOVERNMENTAL AFFAIRS (PPGA)

#### A. Medical Education Future Direction

Ms. Atchley introduced this item indicating it would be a discussion on the future of medical education in the state. She turned the time over to Mr. Freeman who provided information for Board members on the item.

Mr. Freeman indicated the Medical Education Study Committee (MESC) has been considering this issue for the past several years and has reached a point where it requests direction. The MESC made recommendations to the Board in 2009; those recommendations were approved by the Board at that time. Within those recommendations, the fourth recommendation was that the three universities collaborate together with the Boise Veterans Administration (VA) in an approach organized by the state Board to develop a four year medical education program. The work to date of the MESC has been in looking at expansion of either the 1<sup>st</sup> year program in Idaho or possibly adding a second year in Idaho. The MESC has not spent a lot of time looking at the fourth recommendation. The question to the Board is whether that is the continued intent, which is to have the three universities work together in a collaborative approach. Mr. Freeman indicated there are two other issues for the Board's consideration with respect to line item priorities which will be discussed in the BAHF portion of the agenda at tomorrow's meeting.

Mr. Soltman indicated the Board members were provided with copies of this material along with a status report and that the focus today is on the fourth recommendation. The subcommittee needs direction from the Board in moving forward. Dr. Rush indicated that the specific recommendation number four states "the State Board of Education will oversee an initiative to engage all stakeholder groups, ISU, U of I, BSU, LCSC, University of Washington, VA Medical Center the hospitals and the Idaho Medical Association to jointly develop a collaborative, comprehensive plan for the establishment of a four year Idaho based MD program."

Dr. Rush summarized why and the specific areas the sub-committee needs direction from the Board on, including the need to determine who should play what role in this recommendation. He also commented on the lack of resources for this task. Mr. Terrell asked for clarification on whether the University of Washington (UW) would lead the charge for the program in Idaho. Mr. Lewis responded that after an initial look, continuing to work with UW and evolving that program would likely be the best approach for Idaho. He added that some changes in the UW program have changed the MESC's thoughts and have created a need to look at what the long term plans will be.

Mr. Lewis commented that there are recommendations on this item in place and to continue to proceed with those recommendations would be appropriate. Mr. Lewis suggested reaffirming the recommendations and to have a goal over time to develop a long term plan. Mr. Edmunds commented the residencies and additional seats are where the Board should be focusing right now. He asked for comment on how to get to a 15-year plan from where the committee is today. Mr. Terrell felt items 1 and 2 are incomplete and should be focused on. Mr. Edmunds clarified that the Board needs to stay focused on 1, 2, and 3, and encourage development of item 4 which is the long term plan. Mr. Westerberg expressed importance of not losing sight of all items that were recommended. Ms. Atchley asked about funding from other areas and how it might work. Mr. Soltman responded about residency programs suggesting the hospitals may assist. Mr. Edmunds responded the majority of costs are presently picked up by others. Mr. Freeman indicated currently state funding for the two family medicine residencies and



psychiatry residency is around 8-9% of state funding of their total operating budget. Mr. Soltman reiterated that today's discussion is intended to provide clarity on what the Board should do and what they want institutions to do related to item number four.

Mr. Edmunds expressed the MESC should keep the ten priorities in place while seeking a long term plan. He also commented on the lack of staff resources from the Board office. A timeline was not identified. Mr. Westerberg emphasized it be a coordinated collaborative effort going forward. Mr. Lewis reaffirmed the comments of Mr. Westerberg that initiative in this area be one that is overseen by the Board. Mr. Edmunds suggested proceeding with the recommendations as previously stated.

Mr. Terrell continued to express concern about the need to complete an item before moving on to the next one. Mr. Edmunds expressed hope planning would be going on for item 4, while items 1, 2, and 3 are being implemented. Mr. Westerberg reiterated his feeling that there are too many things being worked on at the Board office with its lack of resources to fully dive into item 4. Mr. Westerberg clarified it is an important item to get to, but felt the resources were lacking to be able to conquer it in the next calendar year. Mr. Lewis offered some clarifying comments that there has been a historical tone of priority on items one through three and that there has been a significant shift in attention and resources toward item four. Mr. Lewis commented that the priorities need to be a Board or committee driven initiative and until the Board is ready to act, they need to be sure to not give the wrong signals to institutions or others.

Dr. Goesling suggested the University of Utah be part of the stakeholder group along with the VA medical centers in Boise and Spokane.

There were no further comments. Mr. Edmunds left the meeting at this time.

#### B. Economic Impact/Type of Degree

Marilyn Whitney provided a brief background on this item and indicated the content would be about ties between higher education and Idaho's economic future. She introduced John Glerum, current Vice President of Standlee Hay Company in Eden, Idaho, former director of the BSU TechCenter, and coordinator of the Governor's Idaho Science and Technology Advisory Council, and highlighted Mr. Glerum's extensive business and entrepreneurial background along with his educational background. Ms. Whitney also introduced Gynii Gilliam, Chief Economic Development Officer for the Idaho Department of Commerce. Ms. Gilliam's present role is to help create jobs across all sectors in the state through job attraction, retention and business expansion. Ms. Gilliam has over 20 years of experience in economic development.

Mr. Glerum thanked the Board for the invitation to participate in today's meeting and provided some information on his background and an overview of how Idaho's economic drivers have shifted over the last 30 years. He commented on what Idaho's economic strengths and opportunities are moving forward and presented some facts and figures that pertain in particular to the Treasure Valley but could be useful to the state of Idaho as a whole. He indicated the top employer in the state is St. Luke's, with Wal-Mart and Micron being second and third respectively. He commented that surprisingly in the last ten years Idaho has gone from a state where companies make and sell things for import and export, to a health care and service provider based economy.

He indicated that surprisingly only 10% of a region's economy is brought by attraction. Two other forms of economic development are start-ups, and expansion/retention, which account for about 45% of growth respectively. Mr. Glerum commented the focus should be on both, but with emphasis on expansion/retention. He discussed how higher education plays into these factors and the importance of the talent that comes from higher education. He shared some candid feelings from his own perspective on higher education indicating that he felt higher education is expensive and inefficient, commenting on the expense of a four year degree. He added that there is a lack of information on how to evaluate public institutions and the rate of return on investment. He felt there is disconnect between student enrollment and curricula in comparison to the needs of the labor market. He indicated that university research, looking externally, does not produce much, if any, commercialization value considering the time and



money involved. He felt university research should result in more economic development given the time and money spent on it.

In conclusion he commented on the importance of producing competitive graduates in the marketplace through higher education. Their success drives economic success which drives the funding for higher education. He felt the students should have to work hard for their degree and not just have it handed to them. He also offered suggestions from his perspective, adding that the Board would probably be surprised with how receptive businesses are for university level talent. He suggested the institutions reach out for internships with local area businesses.

Ms. Gilliam thanked the Board for the opportunity to speak with them today indicating she would be sharing the Department of Commerce's economic development strategy. She commented they look forward to partnering with the State Board of Education in aligning economic development and higher education.

Ms. Gilliam indicated they are working hard to strengthen agency partnerships. She identified their three pillars of focus as business retention and expansion, business development, and business attraction. They are working to identify areas of strength and growth from Idaho and looking at them for the region, the nation and the world's growing demands. Ms. Gilliam identified some opportunities and potential areas of growth the Department of Commerce sees ahead and indicated that is how they are targeting their attraction for expansion and consolidation to happen in Idaho. She indicated there are weak areas in the infrastructure, but they are working hard to address those concerns.

Ms. Gilliam indicated that throughout the regions of the state, they are focusing on the top three strengths from each region to help them fill the gaps affecting growth and success. She emphasized the impact that mining and agriculture have on the state and that they are major areas of production and export for Idaho. She added that global growth in data storage and gadgetry is a large area where engineers, technicians and programmers and other IT specialists will be in demand going forward. She commented a lot of the trades College of Southern Idaho (CSI), Idaho State University (ISU) and the tech schools are providing are in demand. International trade is an area that has grown significantly and it is 8% of Idaho's GSP. International trade, tourism, agri-tourism and food processing are areas where potential growth is great. The food processing industry is an area where scientists and engineers will be in demand. The food processing and Ag industry combined contribute 12% to Idaho's GSP. She indicated Idaho's strongest export partners are Asia and Canada.

Ms. Gilliam thanked the Board for their accessibility to agencies and individuals throughout the state and commented on Commerce's enthusiasm to work with the Board and other agencies in ensuring Idaho's graduates have jobs when they enter the work force.

Ms. Atchley asked Mr. Glerum about internships with his company. Mr. Glerum responded that there needs to be options at the university level to assist the interns.

Ms. Gilliam suggested working with the Department of Commerce in establishing links for student internships. Ms. Atchley asked who's role it is to make the connections – the businesses or the universities. The response was that it should be initiated and set up by the universities and that the students should get some kind of credit so it is meaningful for them. Mr. Glerum added that the student services group needs to respond instantly when they are contacted for an intern because often businesses can't wait around a week or more for a response. Mr. Soltman asked Mr. Glerum for two or three suggestions the Board could do to impact economic development. Mr. Glerum responded by saying that the first is engagement of the students, and the second and consequent suggestions would be getting value out of and using the research and IP that is being done at the institutions. Ms. Gilliam added that cross training would be beneficial as well, for instance with engineers or scientists and business departments, so those in the science fields could get a better understanding of how a business model works.

Mr. Soltman thanked Ms. Gilliam and Mr. Glerum for their presentations to the Board today. Mr. Soltman recessed the meeting for a 15 minute break and asked that the meeting reconvene at 2:45.



**INSTRUCTION, RESEARCH & STUDENT AFFAIRS (IRSA)**C. Five Year Plan**BOARD ACTION**

**M/S (Westerberg/Atchley): To approve the first two years of the Five-Year Program Plan (for the current 2012-13 and upcoming 2013-14 academic years) as submitted. The motion carried unanimously.**

Mr. Westerberg introduced the item and commented on the significant work of staff on this plan. He reminded the Board that the institutions used to function off on an eight year plan which was intended to give the Board a heads up on what the institutions planned on doing programmatically. He introduced Selena Grace and Patty Sanchez from the Board office for the presentation of the plan. Ms. Grace introduced Ms. Sanchez, Academic Affairs Program Manager, who has invested considerable time and effort in the development of this plan.

Ms. Sanchez started by summarizing the original eight year plan, pointing out that it did not provide programmatic detail. The eight year plan included regional meetings which purpose was to review and discuss the proposed draft plans of the institutions. The five year plan and how it differs is a program planning document that represents the institutions' roadmap for the development or expansion of programs consistent with the statewide and regional program responsibilities. Today, the final plans from each of the institutions in comprehensive format are being presented to the Board.

Ms. Grace indicated they are presenting a two year plan today which includes the current and next academic year. The two year plans are being presented because of the level of detail they contain within the five year plan. Ms. Sanchez summarized some of the collaborative efforts and successes of the plans which included collaborations between UI/BSU and ISU/BSU.

Ms. Grace identified some unresolved programmatic discussions which included two outstanding program duplication concerns between the University of Idaho and BSU. The first is BSU's educational leadership and superintendent endorsement. The second is UI's Natural Resource conservation proposal.

Ms. Grace indicated the next steps are to complete the five year plan, commenting there is additional data to be incorporated. The completed plan will be presented at the 2013 August Board meeting. Additional next steps are to revisit statewide program responsibilities, update program titles, determine how to classify programs and statewide responsibilities, and how to address on-line delivery.

Ms. Atchley asked if this will give the Board an opportunity to look back at existing programs as well as forward to new programs to see evidence of the number of participating students and costs of new programs. Ms. Grace responded that this will provide information on the efficiencies of the programs and will be used as a planning tool for program management. Ms. Grace redirected Ms. Atchley to policy III.H., which is more of a program efficiency model.

Mr. Lewis commented on the issue of CIP codes and recommended being careful to review and identify programs as statewide approved programs. Mr. Westerberg clarified that the programs have been reviewed thoroughly in Committee prior to coming before the Board for approval. There was discussion around the use of the word "statewide" and Mr. Soltman clarified the source document for the use of the word "statewide" is contained in policy III.Z. Mr. Westerberg added that IRSA will be doing a study on policy III.Z. roles and missions, and that III.Z. is silent on on-line courses. They have asked the Council of Academic Affairs Programs (CAAP) Committee to make recommendations on both of these issues.

**EXECUTIVE SESSION**Idaho Division of Vocational Rehabilitation



**M/S (Atchley/Westerberg): To go into Executive Session pursuant to Idaho Code §67-2345(1)(f) – “to communicate with legal counsel ... to discuss the legal ramifications of and legal options for pending litigation, or controversies not yet being litigated but imminently likely to be litigated.” The motion carried unanimously.**

University of Idaho

**M/S (Atchley/Westerberg): To go into Executive Session pursuant to Idaho Code §67-2345(1)(d) and (e) – “To consider records that are exempt from disclosure as provided in chapter 3, title 9, Idaho Code; ...and to consider preliminary negotiations involving matters of trade or commerce in which the governing body is in competition with governing bodies in other states or nations. The motion carried unanimously.**

**M/S (Terrell/Goesling): To go out of Executive Session at 4:40 p.m. The motion carried unanimously.**

At this time, the Board resumed the meeting to address item 2 from the BAHHR agenda to approve the settlement agreement consistent with the terms discussed in executive session.

**BUSINESS AFFAIRS & HUMAN RESOURCES (BAHR) - Section I – Human Resources**

2. Idaho Division of Vocational Rehabilitation – Settlement Agreement

**BOARD ACTION**

**M/S (Terrell/Atchley): To approve the settlement considered by the Board in executive session and to authorize the Idaho Division of Rehabilitation to sign all necessary settlement documents. The motion carried unanimously.**

**M/S (Terrell/Goesling): To recess the meeting until Thursday morning at 8:30 a.m. The motion carried unanimously.**

**Thursday August 16, 2012, 8:30 a.m., Idaho State University Pond Student Union Building, Salmon River Suite, Pocatello, ID.**

Vice President Soltman called the meeting to order at 8:30 a.m. Matthew Watsen, ISU student body president, welcomed the Board and attendees to the meeting and provided some updates of campus activities for this year. Mr. Soltman asked for a moment of silence to recognize Annie Veseth who was a student at LCSC recently killed while fighting fires in north Idaho. He also introduced Dr. Joe Dunlap as the new president of North Idaho College.

**OPEN FORUM**

Ms. Downing, a retiree of Idaho State University, is concerned about the leadership of ISU. She read aloud the definition of leadership for the Board members and indicated there have been four votes of no confidence in the university's leadership. She is concerned that the university is losing valuable faculty and staff because of poor leadership. She also expressed concern about the exclusion of the university's faculty senate. Mr. Soltman thanked Ms. Downing for her comments.

Dr. Lloyd Call was also invited to come forward during open forum. He is a retired cardiologist and has been active in developing medical education in Idaho. He stated the time to develop medical training in



Idaho is critical and that it takes 11 years to train a medical professional and up to 15 years for a specialist, pointing out that the debt ratio is also a legitimate concern for students. He felt we must support our community and students with quality medical care. He felt the education requirements for medical training could be largely supported by the three major institutions in Idaho. Dr. Call felt there should be two capabilities in the medical school, one to train physicians and the other to serve as a coordinating body for the medical programs in the state. He urged the Board to be moving forward on medical education in Idaho. Mr. Soltman thanked Dr. Call for his comments.

**CONSENT AGENDA**

**M/S (Atchley/Goesling): To approve the Consent Agenda as submitted. The motion carried unanimously.**

1. Idaho Division of Vocational Rehabilitation – Advisory Council Appointments

**By unanimous consent to approve the appointment of Gordon Graff to the Vocational Rehabilitation State Rehabilitation Council for a term of three years effective September 1, 2012 and ending August 31, 2015.**

2. Item pulled prior to posting Agenda

3. EPSCoR Appointment

**By unanimous consent to appoint David Tuthill to the Idaho Experimental Program to Stimulate Competitive Research Committee as a representative for the private sector, effective immediately, for a term of three (3) years, expiring June 30th, 2015.**

4. 2010-2011 Accreditation Summary Report of Idaho Schools

**By unanimous consent to approve the 2012–2013 Accreditation Summary Report of Idaho Schools as submitted.**

5. Adoption of Curricular and Related Instructional Materials as Recommended by the Curricular Materials Selection Committee

**By unanimous consent to approve the adoption of English Language Arts curricular materials and related instructional materials as recommended by the curricular Materials Selection Committee as submitted.**

6. Appointment to the Professional Standards Commission

**By unanimous consent to approve Nick Smith as a member of the Professional Standards Commission for a term of three years representing the Department of Education, effective August 16, 2012.**

**By unanimous consent to approve Paula Kellerer as a member of the Professional Standards Commission for a term of three years representing Private Higher Education, effective August 16, 2012.**

7. University of Idaho – Foundation Agreement

**By unanimous consent to approve the Operating Agreement between the University of Idaho Foundation, Inc. and University of Idaho, including the Agreement for Loaned Employee, as presented.**

8. Lewis-Clark State College – Foundation Agreement



**By unanimous consent to approve the revisions to the Operating Agreement between the Lewis-Clark State College Foundation, Inc. and Lewis-Clark State College as presented.**

### **PLANNING, POLICY & GOVERNMENTAL AFFAIRS (PPGA)**

#### 1. Idaho State University (ISU) – Annual Report

Ms. Atchley introduced ISU President Art Vailas. Dr. Vailas recognized ISU General Counsel Brad Hall who he indicated would be retiring this year. Dr. Vailas provided an overview of ISU's progress in carrying out the College's strategic plan and shared some details of implementation, status of goals and objectives and information and points of interest. He indicated total student enrollment is up; non-resident students have increased by 4% and international students have increased by 29%. He also indicated the number of students engaged in on-line learning is also going up. Early college by high school students is up from FY11 to FY12. He indicated enrollment is also up on bridge programs at ISU as well.

Dr. Vailas commented on some of the programs that have received grant funding and their importance to Idaho and beyond. Environment, energy, clinical and biological sciences are the institutions key strengths and their external grant funding exceeds \$9 million, adding that ISU is recognized for its outreach programs. He shared that ISU through its Museum of Natural History, is now the 2<sup>nd</sup> university in the United States that is a formal affiliate with the Smithsonian Institute. ISU is growing their collaborations with BYU-Idaho, BSU, College of Idaho, the Idaho Department of Labor and ISU Workforce training.

Dr. Vailas indicated their tuition costs over time have shown a downward trend and the university's debt is also going down. He indicated the faculty turnover rate continues to be low. Dr. Vailas shared some information on cutting edge programs in energy and the proposed anatomy and physiology cadaver lab in the Meridian Health Sciences Center. He commented on some of the facilities upgrades on campus – including the reopening of Colonial Hall. Dr. Vailas pointed out that ISU's deferred maintenance costs continue to increase over time. Campus beautification was boosted because of the Wheatley Foundation Campus Beautification donation. He also pointed out that during the recent and tragic Charlotte Fire in Pocatello, many students and faculty came together to help the community who experienced loss as a result of the fire.

Mr. Luna asked about the number of patents a university should turn out and if the numbers presented yesterday were accurate. Dr. Vailas did not agree with the metrics presented yesterday but felt that progress was being made in that area. He believes the universities are working with the Department of Commerce on this subject and feels Idaho lacks the significant resources for marketing institutions' intellectual property.

#### 2. President's Council Report

Ms. Atchley welcomed President Bert Glandon, College of Western Idaho President, and current chair of the Presidents' Council to give a report from the most recent Presidents' Council meeting.

Dr. Glandon reported that the presidents met with Dr. Rush and Dr. Swartz recently, creating a timeline and establishing breakout groups for the coming year. Dr. Glandon has also scheduled planning meetings prior to each council meeting and commented that the agenda and minutes going forth will reflect clear distinction explicitly identifying action items and who they are to be communicated to. At the most recent meeting, they discussed the Regents degree and its target audiences. They agreed that it needs to be delivered both in person and on line. Dr. Glandon indicated they conversed about the accreditation process and identified what steps need to be taken for each of the institutions. They also hope to create an evaluation system for life experiences. Dr. Glandon indicated they concluded discussion on this item by setting a timeline and intend to communicate with the provosts on the degree in November, and receive information from student services in December or January.

Dr. Glandon reported the Presidents also discussed a number of items including reciprocity and tuition waivers and the importance of a good tracking tool for use in reporting students who go on from



community colleges. They discussed tech transfer and pointed out that on-campus interaction with faculty is important. They discussed learning outcomes and the importance of curriculum meeting student and community needs.

Dr. Goesling asked if the group has discussed III.Z. Dr. Glandon responded they did discuss the policy and they are in agreement that online programs should not have regional restrictions. There was discussion on how to assure credits issued at the community colleges transfer to the four year institutions. President Westerberg congratulated the President's Council on an aggressive and forward moving agenda.

### 3. Idaho Public Television – Annual Report

Ms. Atchley introduced Peter Morrill, General Manager the Division of Idaho Public Television (IPTV), who provided an overview of IPTV's progress in carrying out the agency's strategic plan. He indicated today's presentation includes an agency overview, funding sources for educational content, efficient delivery system details and other informational material.

Mr. Morrill shared that IPTV has been in service since 1965 and is the second most watched per capita PBS station in the United States. He described the funding for the current fiscal year and that operating and personnel costs total \$7,014,000. He reported on educational content funding which is funded by annual donations and grants. They have excellent educational partnerships with some institutions in the state and have some exciting new educational services for students and teachers. He reported on the many awards IPTV has received which include 53 national and regional awards of distinction in FY12, sharing that they are very honored and proud of that fact.

Idaho Legislature Live which is a partnership with the Legislative Services Office and the Department of Administration served over 75,000 users during the 2012 session. Beginning this August there is a similar partnership beginning with the Idaho Supreme Court and the Department of Administration.

Mr. Morrill commented on the statewide delivery system and its highly efficient design and infrastructure. He touched on general fund history and indicated they received a small boost in capital replacement this last fiscal year. He pointed out that Idaho PTV uses about half the FTEs of its benchmark comparison, which equates to using about half the number of people other comparative peer stations use. Those peers included Mississippi, Utah, Iowa, South and North Dakota and West Virginia. IPTV uses alternative funding sources but there are limitations on where revenue can be generated because of regulation. This means they do not generate revenue from commercials, or have cable or satellite charges for programming, etc. Mr. Morrill indicated there has been a decline in capital funding sources and that private donor funding is scarce. Funding will continue to be a significant challenge for public television and radio stations nationwide.

Mr. Morrill identified some areas of risk for IPTV as capital replacement, repairs and maintenance, completing the basic digital transition by 2012, FCC mandates and translator channel changes, and removal of analog equipment. Mr. Morrill shared details on some of the deferred maintenance problems they are facing indicating the current operating level is not sustainable with current level of general fund support for operations and capital replacement funding. He pointed out clearly that if equipment replacement continues to be deferred, it will lead to loss of service.

Mr. Morrill reported that for the FY14 appropriation there is an interest that IPTV be granted a continuous appropriation for privately raised funds. The legislative budget office has indicated they would like to explore a continuous appropriation model. If they decide upon this model, there will need to be a process to recognize IPTV in Idaho Code.

Looking forward, they are excited to broadcast the Idaho debates in October, Idaho Reports and Idaho Legislature Live in January, and in March the 30<sup>th</sup> anniversary of Outdoor Idaho will be celebrated.

Mr. Soltman asked where they are with the digital transition. Mr. Morrill responded they have completed the basic transmitter conversion as mandated by the FCC and are currently working on the transition of



all the translators across the state. They have funding for 30 of the 43 translators. He said they are cautiously optimistic to have the remainder completed by 2014. Mr. Soltman asked what the dollar amount is of the deferred maintenance. Mr. Morrill responded approximately \$2.8 million at this time. Mr. Luna asked if their federal funds are subject to sequestration. Mr. Morrill responded they are and provided some detail. Ms. Atchley thanked Mr. Morrill for his presentation.

4. Proposed Rule – IDAPA 08.01.10 – Work Study Program

**BOARD ACTION**

**M/S (Atchley/Westerberg): To approve the Proposed Rule changes to IDAPA 08.01.10 as submitted. The motion carried unanimously.**

Ms. Atchley gave a brief introduction of the rule and introduced Tracie Bent from the Board office for further explanation. Ms. Bent summarized the recommendations for this rule and indicated the Idaho Work Study program has been evaluated by staff as part of the review of state scholarship programs, and while it is not a scholarship program it has been determined that changes should be made to Idaho code as well as rule that will make the program easier to manage. Amendments to Idaho code will be brought back to the Board for approval at the October Board meeting.

5. Proposed Rule – IDAPA 08.01.11 – Proprietary Schools

**BOARD ACTION**

**M/S (Atchley/Westerberg): To approve the Proposed Rule changes to IDAPA 08.01.11 as submitted. The motion carried unanimously.**

Ms. Atchley gave a brief introduction of the rule. Tracie Bent from the Board office summarized the changes to this rule which were based on input received from public and private schools. The changes were related to the reporting period for determining the gross Idaho tuition. The amendment bases it on the tax year. The proposed changes simplify the calculation of Idaho tuition revenue for the schools and institutions registering. The added disclosure to students will provide for greater consumer protection and transparency for those students who have entered a program only to find out the clinical or internship positions are out of the area.

6. Proposed Rule – IDAPA 08.01.14 – Rural Physician Incentive Fund

**BOARD ACTION**

**M/S (Atchley/Terrell): To approve the Temporary Proposed Rule change removing IDAPA 08.01.14 – Idaho Rural Physician Incentive Program. The motion carried unanimously.**

Ms. Bent clarified the changes to the rule for Board members summarizing the removal of IDAPA 08.01.14 will eliminate what is now an unnecessary section of administrative rule due to changes in statute that shifted the management of this program to the Department of Health and Welfare.

7. Proposed Rule – IDAPA 08.02.02 – Rules Governing Uniformity (Alternate Route to Certification)

**BOARD ACTION**

**M/S (Atchley/Goesling): To approve the Proposed Rule changes to IDAPA 08.02.02 – Rules Governing Uniformity, clarifying the alternate route to certification process as submitted. The motion carried unanimously.**

Ms. Bent clarified the changes to this rule for Board members summarizing the proposed changes to IDAPA 08.02.02 would repeal expired sections of administrative rule and bring the para to educator alternate route to certification into compliance with federal regulations, adding that Board staff worked



with Department staff on this rule change.

8. Proposed Rule – IDAPA 08.02.04 and 08.03.01 – Charter Schools

**BOARD ACTION**

**M/S (Atchley/Terrell): To approve the Temporary Proposed Rule changes to IDAPA 08.02.04 and IDAPA 08.03.01 as submitted. The motion carried unanimously.**

Ms. Bent summarized the changes will bring both rules into compliance with changes made during the 2012 legislative session and provide for administrative efficiencies. The Charter Commission recommends approval as well.

Mr. Terrell asked Mr. Luna if he felt this goes against the reasoning for setting up the charter school system. Mr. Luna said this helps to bring definition to the roles and responsibilities of the charter commission and is a step in the right direction.

9. Proposed Rule – IDAPA 47.01.01 – Division of Vocational Rehabilitation

**BOARD ACTION**

**M/S (Atchley/Luna): To approve the Proposed Rule changes to IDAPA 47.01.01 as submitted, effective July 1, 2013. The motion carried unanimously.**

Ms. Atchley indicated the proposed changes incorporate the updated Field Service Manual into rule and clarify process and procedures for customer appeals and order of selection.

10. President Approved Alcohol Permits

Ms. Atchley indicated this information item is a review of the president approved alcohol permits, and information was provided to the Board members for review in their agenda materials. There was no discussion.

11. Students Come First

**BOARD ACTION**

**M/S (Atchley/Terrell): To reaffirm the Board's support of Students Come First. The motion carried unanimously.**

Ms. Atchley introduced this item and gave a brief summary indicating that the Students Come First reform legislation was enacted in the 2011 legislative session in response to the budget cuts by the economic recession. The final legislation addressed three main areas of K-12 education which were labor relations, teacher pay and modernization/technology updates. Repeal of the Students Come First legislation would create uncertainty for the state's K-12 education system. This motion is to reaffirm support for Students Come First.

**DEPARTMENT OF EDUCATION**

1. Superintendent's Update

Superintendent of Public Instruction, Tom Luna, provided a brief update from the State Department of Education (SDE). He introduced Roger Quarles from BSU who gave a presentation to the Board on the Idaho Leads project. This is a new statewide project intended to improve Idaho schools that aims to build leadership, relationships and student achievement. He indicated the J.A. and Kathryn Albertson Foundation is supportive of this program. They hope to help local school districts to build leadership capacity and emphasize regional collaboration to develop and share best practices for distributed



leadership. He indicated the invitation to participate went out to all districts and charters and there are 49 districts that are currently participating.

Mr. Quarles reported the project has six levels of evaluation. He showed the regions for this program and indicated there are required participant teams that include a superintendent, a trustee, principal, teacher and student. The participant teams identified some barriers which included fear of change, time and funding resources, and lack of knowledge to name a few. He also said that the barriers identified were viewed as drivers for this program. The partners of this project include the Idaho Technology Council, school boards and school administrators to name a few. He indicated they send out a monthly newsletter and a weekly communication to all participants and indicated anyone could sign up for the newsletter from their website.

Mr. Soltman asked what would happen with the other districts. Mr. Quarles responded the other districts opted to not participate at this time and they hope that they will become involved in the future.

Dr. Goesling asked about not seeing the Idaho Education Association (IEA) on the list of participants. Mr. Quarles stated they did not solicit partnerships but if the IEA would like to participate they would be welcome. Dr. Goesling asked what the relationship would be between their effort and the star ratings. Mr. Luna felt this effort would help all districts transition to the 21<sup>st</sup> century education system. Dr. Goesling asked about collaborations with other institutions within the state. Mr. Quarles responded the J.A. and Kathryn Albertson Foundation funded this project and suggested there will be an opportunity in the future for joint collaborations.

Mr. Luna added as part of his Superintendent's report an update on the ESEA waiver with the U.S. Department of Education, pointing out they are continuing to negotiate with the U.S. Department of Education and he is hopeful they will come to a resolution soon. He indicated they are not ready to approve the motion on the ESEA waiver and requested to remove it from the agenda.

**Unanimous consent was requested to remove item seven – the ESEA waiver – from the agenda. There were no objections to this request.**

Mr. Terrell asked if this would hold up anything related to the Star program. Mr. Luna responded it should not.

2. Proposed Rule - IDAPA 08.02.02.004 - Rules Governing Uniformity, Incorporation by Reference

#### **BOARD ACTION**

**M/S (Luna/Atchley): To approve the proposed revisions to the Idaho Foundation and Enhancement Standards for: Idaho Core Teacher Standards, Bilingual Education/ English as a New Language Teachers, Foreign Language Teachers, Professional Technical Education Teachers, and Teacher Leader Standards as submitted. The motion carried unanimously.**

**M/S (Luna/Terrell): To approve the proposed rule change to IDAPA 08.02.02.04.01, Rules Governing Uniformity, Incorporation by Reference. The motion carried unanimously.**

3. Proposed Rule - IDAPA 08.02.02.016, .021, .022, .023, .024, .029 Rules Governing Uniformity

#### **BOARD ACTION**

**M/S (Luna/Goesling): To approve the proposed rule amendment to Idaho Administrative Code IDAPA 08.02.02.016, .021, .022, .023, .024, and .029, Rules Governing Uniformity as submitted. The motion carried unanimously.**

4. Proposed Rule – IDAPA 08.02.02. Rules Governing Uniformity, subsection 120 -



121. Local District Evaluation Policies**BOARD ACTION**

**M/S (Luna/Goesling): To approve the proposed changes to IDAPA 08.02.02, Rules Governing Uniformity, amending Subsection 120 and adding subsection 121 as submitted.** The motion carried unanimously.

Mr. Luna introduced the rule and summarized changes for the Board. If the State Board of Education does not approve the changes, Idaho will be out of compliance with the requirements of the US Department of Education's ESEA Waiver application. If the waiver is not approved, Idaho schools will continue to be held accountable under the No Child Left Behind (NCLB) mandates rather than the new system of accountability approved by the State Board on February 16, 2012. There was no discussion.

5. Proposed Rule – IDAPA 08.02.03 Rules Governing Thoroughness, subsection 004 English Language Proficiency Standards – Incorporated by Reference.

**BOARD ACTION**

**M/S (Luna/Terrell): To approve adoption of the 2012 WIDA English Language Proficiency Standards, as the English Language proficiency standards.** The motion carried unanimously.

**M/S (Luna/Goesling): To approve the proposed rule change to IDAPA 08.02.03.004, Rules Governing Thoroughness, to incorporate the 2012 WIDA English Language Proficiency Standards by reference.** The motion carried unanimously.

6. Proposed Rule - IDAPA 08.02.03.008, Rules Governing Thoroughness-Definitions H-S

**BOARD ACTION**

**M/S (Luna/Atchley): To approve proposed rule changes to IDAPA 08.02.03.008, Rules Governing Thoroughness, defining one to one mobile computing devices and professional development as submitted.** The motion carried unanimously.

Mr. Luna introduced the item and summarized changes for the Board. Dr. Goesling asked if the reimbursement would be at the standard cost. Mr. Luna responded the reimbursement would be what the state is paying on a per-student per-year basis. There was no further discussion.

**BUSINESS AFFAIRS & HUMAN RESOURCES (BAHR) - Section I – Human Resources**1. Deferred Compensation Plan**BOARD ACTION**

**M/S (Terrell/Atchley): To approve the amendments to the Idaho State Board of Education 457(b) Deferred Compensation Plan document as presented in Attachment 1, and to authorize the Executive Director to duly execute the document.** The motion carried unanimously.

Mr. Terrell introduced the item and asked Mr. Freeman from the Board office to provide background. Mr. Freeman indicated the state Board sponsors three different retirement plans and one of those plans had not been updated since 2006. Tax and legal counsel have reviewed the plans which incorporate required tax law changes and other appropriate modifications. There was no further discussion.

3. Idaho State University – Head Men's Basketball Coach**BOARD ACTION**



**M/S (Terrell/Atchley): To approve the request by Idaho State University to enter into a multi-year employment agreement with William L. Evans, Head Men's Basketball Coach, for a term commencing retroactively on March 9, 2012 and terminating May 9, 2015, in substantial conformance with the agreement submitted to the Board as Attachment 1 with revision of 2015. The motion carried unanimously.**

Mr. Terrell asked ISU Vice President for Finance and Administration Jim Fletcher, and Athletic Director, Jeff Tingey, to come forward for discussion. Mr. Tingey summarized that the multi-year contract they are seeking would be in alignment with industry standards and consistent with other institution contracts at this time. They are asking to have this contract be a four year contract.

Mr. Terrell requested comment on this request being retroactive. Mr. Tingey responded they did not have this information to the Board in a timely manner because of a few internal reasons. He indicated the June deadline was unintentionally missed therefore the request was submitted for consideration at this time.

Mr. Terrell commented the recommendation of the Board is that the contracts do not go beyond three years without special reasons. Mr. Tingey responded that recruitment is a factor and they feel four years is more suitable for coaches to build a foundation for their programs. Dr. Goesling asked about the supplemental compensation with respect to academic and team behavior. Mr. Tingey responded those metrics are set up by the NCAA based on academic performance rates.

Ms. Atchley commented on the establishment of a three year contract that was agreed upon between the Athletic Committee and BAHR, indicating there needs to be consistency in the policy or that it needs to say "up to" so many years. Mr. Fletcher responded that the contract length is consistent with other Idaho institutions and is consistent with the current statement in Board policy. Mr. Westerberg commented the guidelines were for the establishment of three year contracts and anything beyond is an exception. Mr. Westerberg recommended the Athletic Committee be tasked with more than establishing guidelines.

#### 4. University of Idaho – Contract for Employee Benefits

#### **BOARD ACTION**

**M/S (Terrell/Westerberg): To approve the agreements between the University of Idaho and The Standard Insurance Company with Helbling Benefit Consultants as consultant of record, in substantial conformance to the forms submitted to the Board in Attachments 1 and 2, inclusive of the University of Idaho Request for Proposals Number 12-46J and the Helbling Benefit Consultant's response dated June 6, 2012, and to authorize the director of contracts and purchasing services to execute all necessary documents. The motion carried unanimously.**

#### 5. Lewis-Clark State College – Convert Student Affairs Program

#### **BOARD ACTION**

**M/S (Terrell/Goesling): To approve the request by Lewis-Clark State College to restore its previous position of Vice President for Student Affairs by upgrading its current position of Dean of Student Services. The motion carried unanimously.**

#### 6. Eastern Idaho Technical College – Short Term Merit Increase – Executive Director of the Foundation

#### **BOARD ACTION**

**M/S (Terrell/Atchley): To approve the request by Eastern Idaho Technical College and the Eastern Idaho Technical College Foundation to award a one-time short term merit pay increase in the amount of \$5,000 to the Executive Director of the Foundation, and to direct that payment be processed and paid in accordance with Board policy and the Operating Agreement between the College and the College Foundation. The motion carried unanimously.**



**BUSINESS AFFAIRS & HUMAN RESOURCES (BAHR) - Section II – Finance**1. Funding Equity

Mr. Terrell indicated this is an informational item and no motions will be made on it today. The item was returned to the BAHHR committee for further work.

2. Performance Based Funding Initiative (PFBI)**BOARD ACTION**

**M/S (Terrell/Goesling):**

**to approve the following two Outcome Metrics for use as system-wide metrics as part of a Performance-based Funding Initiative: (1) Graduate (i.e. total student) Production; (2) Cost per successfully completed weighted student credit hour. The motion carried unanimously.**

Mr. Freeman shared some background on the discussion and work behind this item. He indicated the financial vice presidents, budget directors, provosts and others attended a work session to discuss metrics of performance based funding both at a system-wide and institutional level. The two metrics arrived upon are contained in the motion. Mr. Freeman pointed out that for institutional specific metrics, institutions can have up to four metrics and they need to contain both a quality metric and a progress metric.

Mr. Soltman suggested the use of benchmarks in reviewing the institution specific metrics. Mr. Herbst indicated they would be working on the benchmarks and have them available at the October Board meeting. Mr. Westerberg thanked everyone for the collegiality and work that went into this item.

3. FY 2014 Line Items**BOARD ACTION**

**M/S (Terrell)/To approve the Line Items for the agencies and institutions as listed on Tab 3 pages 5-7, and to authorize the Executive Director to approve the MCO and Line Item budget requests for agencies and institutions due to DFM and LSO on September 4, 2012.**

**Substitute Motion:**

**M/S (Westerberg/Terrell): To approve the Line Items for the agencies and institutions as listed on Tab 3 pages 5-7, provided that the University of Idaho College of Law second year expansion in Boise is subject to program approval by the Board in October and to authorize the Executive Director to approve the Maintenance of Current Operations (MCO) and Line Item budget requests for agencies and institutions due to DFM and LSO on September 4, 2012. The motion carried unanimously.**

Mr. Terrell introduced Dr. Nellis from the University of Idaho who thanked the Board for the opportunity to speak about the university's proposal to request funding from the Legislature to support their second year of the law program in Boise. Dr. Nellis introduced Dean of Law Don Burnett, and Ms. Megan Fernandez, 2011 graduate, to comment briefly on the institution's Boise Law School program. Ms. Fernandez expressed her gratitude to the Board for allowing her to speak today and identified why the Boise program was attractive to her as a student. She added that the variety of business clinic offerings and internship opportunities in Boise were very helpful to her as a student, because those opportunities were not available elsewhere.

Mr. Burnett summarized some background for the College of Law in Boise including their eight year plan for the program. They are presently ranked 13<sup>th</sup> out of 200 law schools in the country. He indicated the Idaho Law Learning Center in Boise has been moving ahead and there have been many letters of support for this program sent to the Board from distinguished individuals and groups. Mr. Burnett asked for the



Board's support in adding second year classes to the curriculum.

Mr. Terrell asked for Mr. Burnett to respond to a letter that was sent to the Board stating there was not a need for more law graduates and that graduating students are unaware of the shortage of jobs. Mr. Burnett responded to this material by saying about 77% of graduating students nationally were offered jobs. He said employment statistics have shown the results of the recession, but Idaho is ahead of the national average at 86-87%. He also indicated that about 20% of law students have to retake the bar exam which affects the numbers. He indicated Idaho students are at about a 90% pass rate and added that often employment in the law arena shows a juris doctorate degree is preferred, but being licensed is not a requirement. Those types of jobs do not get counted in any of the labor statistics with regard to law license jobs, adding those jobs are often highly desired by law graduates.

Ms. Atchley asked for clarification on the change in delivery points of this program. Mr. Burnett clarified that there is one degree program with two points of delivery – one in Moscow and one in Boise. He stated there is not a duplicate law school with Boise's program. In Boise they hope to accomplish an emphasis on business law, economic development, intellectual property, international business transactions, regulatory law and so forth. In Moscow the emphasis is environmental and natural resources law, Native American law, and litigation and dispute resolution types of law. He added they view the Boise curriculum and the Moscow curriculum as complementary to each other.

There was further discussion about the program and Mr. Westerberg offered some comments, indicating his feeling is that the Board should conditionally approve the line item from the University of Idaho subject to program approval at a later date.

Regarding the FY 2014 line items, Mr. Freeman made further general clarification to some of the information on the summary page provided in the Board materials, indicating the four institutions would be submitting proposals to the Board office by August 26, 2012 at which point BAHF will have the opportunity to make decisions on which proposals go forward. Mr. Freeman requested consensus in working with the financial vice presidents and BAHF to bring forward a number for the placeholder slot by the September 4<sup>th</sup> deadline.

#### 4. FY 2014 Capital Budget Requests

### **BOARD ACTION**

**M/S (Terrell/Westerberg): To recommend no major capital funding for FY 2014 and have the Permanent Building Fund Advisory Council concentrate upon Alterations and Repairs and other non-major projects.** The motion carried unanimously.

**AND**

**M/S (Terrell/Westerberg): To approve the six-year capital construction plans for Boise State University, Idaho State University, University of Idaho, Lewis-Clark State College, and Eastern Idaho Technical College.** The motion carried unanimously.

Mr. Freeman reminded the Board members that as part of the approved revisions to the capital construction policy, there is a requirement that the six year capital plans be approved by the Board on an annual basis. The policy stipulates that the approval of the six year plan puts the Board on notice that the institutions may begin soliciting funds for these projects.

#### 5. Intercollegiate Athletic Reports – NCAA Academic Progress Rate (APR) Scores

Mr. Terrell asked for the presidents to come forward for discussion on this informational item. Mr. Terrell requested a brief update from the institutions on their NCAA APR.

Dr. Vailas summarized briefly that ISU continues to improve in regards to the NCAA APR. He mentioned they have received a letter from the NCAA in appreciation of their progress and that penalties would be



removed. Dr. Nellis summarized that the University of Idaho's averages are up and he is encouraged by this trend. Their golf team needs improvement, but is improving with the new coach and their volleyball team was recognized as one of the top teams. Ms. Pearson stated their APR average multi-year score was 970 and eleven teams improved their scores from 2011. Ms. Pearson shared some of the team rankings and noted a number of awards. Boise State was the only football team to finish the 2011 season ranked in the top ten of the final polls as well as earning a public recognition award. She also shared some very positive information about team grade point averages.

Dr. Goesling recommended looking at the AYP numbers when considering coaches' contracts. Ms. Atchley offered congratulations to the institutions' student athletes both in sports and academically.

6. Amendment to Board Policy – Section V.B. Occupancy Costs – 1<sup>st</sup> Reading

**BOARD ACTION**

**M/S (Terrell/Goesling): To approve the first reading of the proposed amendments to Board Policy V.B. as submitted.** The motion carried unanimously.

7. Amendment to Board Policy – Section V.X. Intercollegiate Athletics – 2<sup>nd</sup> Reading

**BOARD ACTION**

**M/S (Terrell/Atchley): To approve the second reading of proposed amendments to Board Policy moving Section III.T., paragraphs 1-4, Intercollegiate Athletics to Section V.X., Intercollegiate Athletics, and renumber Section III.T.5., Student Athletes – Conduct, as Section III.T.1. with all revisions as presented.** The motion carried unanimously.

8. Boise State University – Clearwire Lease

**BOARD ACTION**

**M/S (Terrell/Goesling): To approve Boise State University's request to enter into an Educational Broadband Service Long-Term De Facto Transfer Lease Agreement with Clearwire Spectrum Holdings III, LLC, and to authorize the vice-president for finance and administration to execute the lease agreement.** The motion carried unanimously.

Ms. Atchley asked if these types of agreements are available to other institutions. Mr. Satterlee, general counsel from BSU responded that all institutions are taking advantage of leases like this.

9. Boise State University – Math/Geoscience Remodel Project

**BOARD ACTION**

**M/S (Westerberg/Atchley): To approve the request by Boise State University to approve the project budget and financing plan for the Math/Geosciences Building Renovation for a total project cost not to exceed \$4.2 million and to authorize the University to proceed with construction, and to direct Board staff to provide written notification of final Board approval to the Governor and the Joint Finance-Appropriations Committee within ten business days pursuant to Board policy.** The motion carried unanimously.

Mr. Terrell excused himself from this item and turned it over to Mr. Westerberg. Ms. Pearson indicated this is a request by BSU for approval of the Math/Geosciences building renovation project and to proceed with construction. Ms. Atchley asked about a funding source. Ms. Pearson indicated funds have been set aside by BSU for this project.

10. Boise State University – Lincoln Recreation Field Project



**BOARD ACTION**

**M/S (Westerberg/Goesling): To approve the request by Boise State University to approve the project budget and financing plan for the Lincoln Avenue recreation field for a total project cost not to exceed \$1 million and to authorize the University to proceed with construction, and to direct Board staff to provide written notification of final Board approval to the Governor and the Joint Finance-Appropriations Committee within ten business days pursuant to Board policy. The motion carried unanimously.**

11. Boise State University – Dona Larsen Park Project**BOARD ACTION**

**M/S (Terrell/Westerberg): To approve the request by Boise State University to enter into a Facilities Use Agreement with the Boise Independent School District for the use of Dona Larsen Park, and to authorize the vice president for finance and administration to execute the agreement. The motion carried unanimously.**

Mr. Terrell provided a brief summary of the item. Dr. Goesling asked about the liability issue on this project. Ms. Marcus, Board legal counsel, indicated they are in agreement with this project. Mr. Soltman thanked BSU for addressing their prior concerns.

12. Boise State University – Yanke Family Research Park Purchase**BOARD ACTION**

**M/S (Terrell/Goesling): To approve the request by Boise State University to purchase the Yanke Family Research Park facility located at 220 Parkcenter Boulevard from the Boise State University Foundation for the principal balance of the loan, estimated to be approximately \$2 million, and to direct Board staff to provide written notification of final Board approval to the Governor and the Joint Finance-Appropriations Committee within ten business days pursuant to Board policy. The motion carried unanimously.**

Dr. Goesling asked for an estimate of the occupancy costs. Ms. Pearson indicated they have not yet completed that calculation at this time and would have a better idea of those costs next year.

13. University of Idaho – Kibbie Dome Enhancement Project Loan Modification

There was no discussion on this item.

14. University of Idaho – Hatley Way Sidewalk Dedication to City of Moscow**BOARD ACTION**

**M/S (Terrell/Atchley): To approve the deed of dedication to the City of Moscow in substantial conformance to the forms submitted to the Board in Attachment 1, and to authorize the University's Vice President for Finance and Administration to execute such document. The motion carried unanimously.**

15. University of Idaho – Niccolls Building Renovation – Plan/Design Phase**BOARD ACTION**

**M/S (Terrell/Atchley): To approve the request by the University of Idaho to supplement the Planning and Design Phase of the Niccolls Family and Consumer Sciences Building Renovations to increase the authorization by \$110,000, to a total authorization of \$260,000. Authorization includes the authority to execute all requisite consulting, design, and vendor contracts necessary**



to fully implement the Planning and Design Phases of the project. The motion carried unanimously.

Mr. Westerberg asked about the funding source for this project. Mr. Smith, University of Idaho Vice President for Finance and Administration, responded that there were three sources which included public works, College of Ag and institutional funds for the remainder.

16. University of Idaho – Student Union Building Floor Renovation – Plan/Design Phase

**BOARD ACTION**

**M/S (Terrell/Atchley): To approve the request by the University of Idaho to implement the planning and design phases of a capital project for second floor renovations and improvements of the Student Union Building in the amount of \$150,000. Approval includes authorization to execute all necessary and requisite consulting, and vendor contracts to fully implement the planning and design phases of the project.** The motion carried unanimously.

Mr. Freeman clarified that the funding source for the project will be university funds and reserves; there are no state funds involved for this item. Mr. Terrell asked to have the word “state funds” removed from the agenda materials for clarification where it referenced “state and institution funds”.

**AUDIT**

1. Boise State University/Bronco Athletics Association (BAA) Agreement

**BOARD ACTION**

**M/S (Atchley/Goesling): To approve the memorandum of understanding between the Bronco Athletic Association, Inc. and Boise State University as presented.** The motion carried unanimously.

Ms. Atchley provided a brief summary of the item. She indicated there was one question about whether the required dual signatures for use of the funds should include a member of the Bronco Athletic Association as well as the BSU Foundation. She indicated that the University and the two associations agree that two signatures from the Foundation is the kind of protection that is needed and it is not necessary for the Board to specify dual signature from the BAA and the Foundation. Ms. Pearson clarified the details of the agreement for the Board members including reporting responsibilities and donor restrictions which must be followed. She indicated the preference of the two associations is being brought forth in the agreement.

2. Amendment to Board Policy – Section V.Y. Compliance Programs – 1<sup>st</sup> Reading

**BOARD ACTION**

**M/S (Atchley/Westerberg): To approve the first reading of proposed Board Policy Section V.Y. Compliance Programs, as presented in Attachment 1.** The motion carried unanimously.

Mr. Freeman expressed appreciation for everyone's work on this policy.

**INSTRUCTION, RESEARCH & STUDENT AFFAIRS (IRSA)**

1. Boise State University – Approval of Full Proposal – Executive Master of Business Operational Excellence

**BOARD ACTION**

**M/S (Westerberg/Goesling): To approve the request by Boise State University to offer an Executive Master of Business Operational Excellence as a self-support program.** The motion carried unanimously.



Mr. Westerberg asked for BSU to provide a short description of the program and commented that it is a self supporting program and no state appropriated funds will be used. Dr. Marty Schimpf introduced Dr. Smith, Associate Dean of the College of Business, to speak to the uniqueness of this program. Dr. Smith indicated this particular program is a partnership between BSU and the Kaizen Institute. The Kaizen Institute is a well known world-wide consulting expert in the area of lean and six-sigma operations. They will assist in instruction and will provide a “real world” perspective in the classroom; and they will help recruit students from across the globe.

## 2. Postsecondary Data Reporting Change to State Census Date

### **BOARD ACTION**

**M/S (Westerberg/Goesling): To approve the request to change Idaho’s official census date from 10<sup>th</sup> day to October 15th for Fall census reporting and March 15th for Spring census reporting and to direct staff to incorporate into Board policy.** The motion carried unanimously.

## 3. EPSCoR Annual Report

Mr. Westerberg introduced Rick Schumaker and Nancy Glenn from EPSCoR to give a short presentation on this item. Mr. Schumaker, Project Administrator, and Ms. Glenn, Lead Scientist, provided a brief report on EPSCoR. Mr. Schumaker commented that EPSCoR is a research infrastructure improvement program funded by National Science Foundation grants as well as state match. They are about transformative research and building community. He expressed thanks for being involved in some state level initiatives over the past year such as the STEM Diversity Summit.

Mr. Schumaker summarized three projects from the past year for Board members. Track 1 was a research infrastructure improvement program, and Track 2 and C2 which invest in internet and cyber infrastructure capacity respectively.

Ms. Glenn provided an overview of the Track 1 project which is a five-year award in which they are presently ending year four. Its focus was on sustainability and engagement with agencies within the state and across the nation. They are geared to developing research infrastructure by investing in people. She reported on some of the highlights of the project and commented on the expansion of collaborations. She indicated they will have an external project advisory board review in October where a group of experts help them refine their objectives and directions to make sure they are touching all of the areas of emphasis they intended to. This year they are hosting a Pacific Northwest Science Climate Conference in conjunction with their annual meeting in Boise.

Mr. Schumaker concluded that during the course of over four years over 400 people at the university level have been involved in the EPSCoR project which is in addition to the thousands of teachers and students that EPSCoR has benefitted. He indicated they have collaboration with partners in Nevada and New Mexico which has given them the chance to offer some new course work for students as well as faculty development opportunities. He concluded by saying that they are continuing to increase their share of NSF research funding they get relative to other states indicating good progress in the long term. Additionally their share of competitive funding that does not come from EPSCoR continues to increase as well, indicating a sign of growth beyond EPSCoR.

## 4. Quarterly Report: Programs and Changes Approved by Executive Director

Mr. Westerberg introduced this information item. Ms. Atchley asked why there were so many discontinuations of the Bachelors of Arts degrees at Boise State. Dr. Schimpf responded in each of these cases they felt they needed to simplify the program choices and streamline the curricula. In doing so, they routinely eliminate low enrollment courses. Ms. Atchley asked if they feel this enhances the STEM aspect at BSU. Mr. Schimpf responded in this case it was about reducing costs.

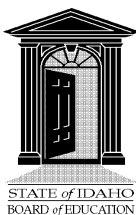
### **OTHER BUSINESS**



There being no further business, a motion to adjourn was entertained.

**M/S (Soltman/Terrell): To adjourn the meeting at 2:51p.m.** The motion carried unanimously.





STATE BOARD OF EDUCATION  
TRUSTEES OF BOISE STATE UNIVERSITY  
TRUSTEES OF IDAHO STATE UNIVERSITY  
TRUSTEES OF LEWIS-CLARK STATE COLLEGE  
BOARD OF REGENTS OF THE UNIVERSITY OF IDAHO  
STATE BOARD FOR PROFESSIONAL-TECHNICAL EDUCATION

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**DRAFT MINUTES  
STATE BOARD OF EDUCATION  
August 17, 2012  
Special Teleconference Meeting  
Boise, ID**

A special teleconference meeting of the State Board of Education was held August 17, 2012. It originated from the Board office in Boise Idaho. Board President Ken Edmunds presided and called the meeting to order at 1:00 p.m. A roll call of members was taken.

**Present:**

Ken Edmunds, President  
Don Soltman, Vice President  
Richard Westerberg

Emma Atchley, Secretary  
Bill Goesling  
Milford Terrell

**Absent:**

Rod Lewis  
Tom Luna

**BUSINESS AFFAIRS & HUMAN RESOURCES**

**1. University of Idaho – Athletic Conference**

**BOARD ACTION**

**M/S (Terrell/Goesling):** I move to authorize the University of Idaho to commence scheduling intercollegiate football games for the 2013-14 football season and beyond, as an unaffiliated, independent FBS institution; and further, to authorize the President of the University of Idaho to negotiate the final terms and determine whether to accept an invitation to the Big Sky Conference, and in doing so to comply with all Board policies and procedures. The motion carried 5-1. (Mr. Edmunds voted nay).

**Discussion:** Milford Terrell introduced this item and indicated this is a request for authorization by the University of Idaho for independent scheduling of football games and for the President to explore and accept an invitation to the Big Sky Athletic conference.

President Nellis summarized that for the last 12 months the University of Idaho (UI) has been working to secure the best possible outcome for Vandal Athletics, given that the Western



Athletic Conference (WAC) is currently unable to support intercollegiate football after the end of the 2012-13 athletic seasons. He indicated institutions are currently engaged in scheduling football games for the 2013-14 seasons and beyond, and it is imperative that the University begin doing so as well in order to ensure a full schedule of games. Consequently, the University seeks authority to commence scheduling football games as an unaffiliated, independent Football Bowl Subdivision (FBS) institution.

Dr. Nellis indicated they would also appreciate the opportunity to consider other conference affiliation options. One of those options is with the Big Sky Conference for the University's non-football intercollegiate sports. The Big Sky has expressed interest in having the University as a member for non-football sports. The University seeks approval from the board for the President to have authority to proceed in the best interests of the University to explore and accept an invitation from the Big Sky Conference. Dr. Nellis added that the primary impact of the University scheduling intercollegiate football as an unaffiliated independent FBS institution is enhanced revenues. Game payments to the University from scheduling as an FBS institution are estimated to exceed current payouts by approximately \$1.5 million annually.

Dr. Nellis introduced Rod Spear, Athletic Director from the University of Idaho, who reiterated the comments of Dr. Nellis and added they hoped to obtain the maximum flexibility in working with the Big Sky Conference.

There was discussion surrounding the length of time the motion covers, whether it was a two year agreement or open ended. Many board members agreed that there needed to be flexibility with this program and supported it being open ended in nature.

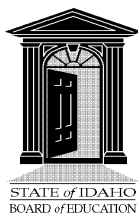
Mr. Luna asked about the financial aspect of athletics and the funding requirements of Title IX. He asked for clarification that the Title IX requirements would not be jeopardized by the approval of today's motion. Mr. Spear indicated they are in compliance with all Title IX requirements presently and intend to remain that way.

**Other Business:**

There being no further business, a motion to adjourn was entertained.

**M/S (Soltman/Atchley): To adjourn at 1:25 p.m. Motion carried unanimously.**





STATE BOARD OF EDUCATION  
 TRUSTEES OF BOISE STATE UNIVERSITY  
 TRUSTEES OF IDAHO STATE UNIVERSITY  
 TRUSTEES OF LEWIS-CLARK STATE COLLEGE  
 BOARD OF REGENTS OF THE UNIVERSITY OF IDAHO  
 STATE BOARD FOR PROFESSIONAL-TECHNICAL EDUCATION

**DRAFT MINUTES  
 STATE BOARD OF EDUCATION  
 September 14, 2012  
 Special Teleconference Meeting  
 Clear Waters Conference Room  
 Boise, ID**

A special meeting of the State Board of Education was held September 14, 2012. It originated at the Office of the State Board of Education, in the Len B. Jordan building Clear Waters conference room located at 650 W. State Street, 3<sup>rd</sup> Floor in Boise, Idaho. Board Vice President Don Soltman and called the meeting to order at 1:00 p.m. Board President Ken Edmunds joined the meeting shortly thereafter. A roll call of members was taken.

**Present:**

Ken Edmunds, President  
 Don Soltman, Vice President  
 Emma Atchley, Secretary

Bill Goesling  
 Milford Terrell  
 Rod Lewis

**Absent:**

Richard Westerberg  
 Tom Luna

**BUSINESS AFFAIRS & HUMAN RESOURCES (BAHR)**

1. Boise State University – Ticketing Software Contract Renewal

**BOARD ACTION**

**M/S (Terrell/Atchley): I move to approve Boise State University's request to extend the ticketing software agreement with Veritix for two years at a cost of \$280,800 in substantial conformance to the form provided in Attachment 2. The motion carried unanimously.**

Mr. Terrell introduced the item and indicated this is a request for approval of a two-year extension of Boise State University's (BSU) ticketing software contract with Veritix. Mr. Terrell summarized that the renewal cost for FY13-FY15 is \$280,800 and there is no increase in the contract cost from the previous FY11-12 contract period.

**INSTITUTIONAL RESEARCH & STUDENT AFFAIRS (IRSA)**

1. Board Policy III.P.16 Student Health Insurance – 1<sup>st</sup> Reading

**BOARD ACTION**

**M/S (Terrell/): To approve the first reading of the amendment to Board Policy III.P.16., as**



**presented.** The motion failed due to lack of a second.

**M/S (Terrell/Atchley): To exempt Eastern Idaho Technical College from Board Policy III.P.16.** The motion failed 4 to 2 (Mr. Lewis, Mr. Terrell, Mr. Soltman and Mr. Edmunds voted nay).

Mr. Terrell introduced the item and indicated this item would clarify whether the institutions would be required by Board policy to offer and manage student health insurance programs.

Mr. Terrell turned the floor over to Mr. Freeman to provide further explanation. Mr. Freeman reminded the Board members that this is a first reading. He indicated the Board did consider student health insurance at its April 2012 meeting at which time a one year waiver of the policy was requested. Mr. Freeman summarized the proposed policy would still have a mandate that all full time students would be required to have health insurance. He pointed out what would change would be that the institution would have the discretion whether or not to offer health insurance coverage through their institution. I.e., if the institution decided to not offer health insurance, the student would need to obtain their own health insurance.

Mr. Freeman indicated one other change this policy would make is that the insurance the student would carry, if they opted out of obtaining insurance from the institution, would not have to be substantially equivalent to what the institution was offering, which is currently a requirement under Board policy. Mr. Freeman clarified that the institutions would still be required to verify students have health insurance coverage.

Mr. Freeman pointed out that Eastern Idaho Technical College (EITC) has requested to be exempted from this policy in its entirety. EITC pointed out that the cost of health insurance is approaching the cost of tuition for their students, adding that they serve a student population more analogous to a community college. Additionally, EITC pointed out that none of the three community colleges require their students to have health insurance.

Mr. Soltman asked if athletes and international students would be treated differently than the other student populations. Ms. Stacy Pearson from Boise State responded that they would seek mandatory insurance for both student athletes and international students. She indicated that about 85% of BSU students currently waive out of the university's student health insurance program, leaving about 15% needing insurance. Those students would be served by BSU's Student Health Services office which would help students find insurance to meet their needs and budget. She indicated BSU recognizes the issue with the student athletes and international students and would seek an RFP to obtain insurance for those populations. Mr. Soltman responded his feeling is that there shouldn't be populations of students that are treated differently and that insurance should either be provided or not for all students. Ms. Pearson responded indicating there will always be different populations of students because of different requirements, for example as with the NCAA and student athletes.

Ms. Atchley asked of the 15% that do not have insurance, does the university have a liability to help those students with their medical expenses. Ms. Pearson indicated that the policy does not address liability, only whether the student has or does not have health insurance. She indicated the university requires proof of coverage from the student before they will drop the university coverage. She added that some students who cannot afford the insurance will drop to part-time status; part-time students are not required to have health insurance under the mandate. Ms. Pearson emphasized that they do try to work with students to get them adequate coverage before reducing them to part-time status.

Dr. Goesling asked how the University of Idaho covers mental health. Mr. Ickes from the University of Idaho indicated their health care plan covers psychiatric visits and went on to describe the plan. Representatives from Idaho State University (ISU), Lewis-Clark State College (LCSC) and BSU all responded that their policies cover mental health, adding that counselors offer free counseling services. Dr. Goesling asked if student loans cover health insurance costs. Mr. Ickes from the University of Idaho responded that their understanding is that if it is a mandatory policy for the institution it can be included in the cost for attendance for federal financial aid. If it becomes optional, and not mandatory, it may not be included in the federal financial aid request. I



Dr. Goesling asked about trends of students who either obtain the institutions' insurance or opt out. Ms. Pearson said BSU's trends show a steady decrease in students' participation in health insurance offered by institutions. Mr. Ickes from the University of Idaho indicated an increase in students participating in the institution health care plans. There were other mixed responses, not indicating a trend one way or another. Mr. Edmunds asked what is required of the community colleges. Mr. Freeman indicated none of the community colleges require students to carry health insurance.

Mr. Lewis referenced the agenda materials presented to Board members where it references a student health insurance plan for BSU, ISU and LCSC "for the period of three years and seven optional renewals of one year each, subject to mutual agreement between the parties," and asked if this change would go into effect after the three year contract or after the next fiscal year. Ms. Pearson indicated they would need to notify the insurance vendor that they would not be rebidding for the next year, so July 2013 would be when the change would occur.

Mr. Lewis asked about the reference to economies of scale being no longer applicable as well. Ms. Pearson responded that the majority of their students are not taking advantage of the insurance and they feel their efforts are better spent working with the students to get them the insurance they need rather than dropping them to part-time status. They feel they are not getting good bids because of the lack of participation rates.

Mr. Ickes reminded the Board members that the University of Idaho policy is that any degree seeking student must take part in the plan or show comparable coverage. He added that their students do not have the option to reduce to part time. Mr. Herbst indicated LCSC's part time students have not been required to carry insurance. They feel it allows students who are at the economic edges to still participate. Mr. Fletcher responded ISU's part time students are not required to carry insurance either. President Albiston responded that at EITC students who take 10 or more credits are required to carry health insurance. Part-time students may opt-in, but it is not mandatory for part-time students to have coverage. The exception at EITC is their health education students are required to carry insurance, whether they are full time or part time.

With regard to the second motion, EITC was asked to speak to the motion. President Albiston responded that they have concerns about the costs to students for insurance. They feel with the regulations and costs increasing, the fees will go up to the point of a four year college. Their student insurance costs have gone up significantly and are presently \$314 per semester, up from \$84 two years ago.

There was additional discussion about the per semester rates for insurance among the institutions. Mr. Edmunds asked about the costs for EITC being lower than the other institutions. Dr. Albiston responded that their rates were lower due to a cap on the annual % increase allowable. Additionally, EITC does not have an athletics program or housing which would drive the costs up.

## **OTHER BUSINESS**

There being no further business, a motion to adjourn was entertained.

**M/S (Terrell/Goesling): To adjourn at 2:17 p.m.** Motion carried unanimously.



**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS  
OCTOBER 17, 2012**

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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
A	<b>IDAHO STATE BOARD OF EDUCATION – PERFORMANCE MEASURE PRESENTATION</b>	Information Item
B	<b>PUBLIC POSTSECONDARY INSTITUTION - PERFORMANCE MEASURE PRESENTATION</b>	Information Item
C	<b>STATEWIDE HIGHER EDUCATION RESEARCH STRATEGIC PLAN – PERFORMANCE MEASURE REPORT</b>	Information Item



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**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
**OCTOBER 17, 2012**

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**SUBJECT**

Board Performance Measure Report and Discussion

**REFERENCE**

October 2009	Board reviewed performance measures for the period from FY 2006 through FY 2009.
December 2009	The Board approved its strategic plan, including performance measures for the next four years.
October 2010	Board reviewed performance measures for the period from FY 2007 through FY 2010.
December 2010	The Board approved its strategic plan, including performance measures for the next four years.
June 2011	The Board discussed the desire to further evaluate the performance measures included in the Board's and the institution's and agency's strategic plans.
October 2011	Board reviewed performance measures for the period from FY 2008 through FY 2011.
December 2011	The Board approved its strategic plan, including performance measures for the next four years.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section I.M, Section 67-1901 through 1905, Idaho Code

**BACKGROUND/DISCUSSION**

The performance measure data are presented to provide a general overview of the progress of the state public education system under the purview of the Board is making toward the Board's Strategic Plan. This presentation is meant to demonstrate the overall cumulative progress being made toward the Board's strategic goals and objectives.

Discussion following the presentation will give the Board members the opportunity to ask questions regarding the progress toward the Board's goals, determine if they are the correct measures to use and identify additional measures to include, or existing measure to remove from the Board strategic plan. The Board's updated strategic plan will be presented in December for Board action.

**IMPACT**

The data included in this presentation is used by the Board to direct future system-wide planning efforts.

**ATTACHMENTS**

Attachment 1 – Board of Education Performance Measure Report	Page 3
Attachment 2 – Board of Education Strategic Plan	Page 9



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
**OCTOBER 17, 2012**

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**STAFF COMMENTS AND RECOMMENDATIONS**

The Board approves/updates its strategic plan in December of each year; the strategic plan includes performance measures and benchmarks. In September of each year the Board and the institutions and agencies under the Board are required to select performance measures from their strategic plan and submit them to the Division of Financial Management (DFM). DFM then provides the report to the Governor and the legislature as well as posting them on their website. The performance measures provided in the Performance Measure Report are performance measures approved by the Board when the Board approved the strategic plans.

**BOARD ACTION**

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



## **Part I – Agency Profile**

### **Agency Overview**

The Idaho Constitution, Article IX, Section 2, provides that the general supervision of the state educational institutions and public school system of the State of Idaho, “shall be vested in a state board of education, the membership, powers and duties of which shall be prescribed by law.” The State Board of Education envisions an accessible, seamless public education system that results in a highly educated citizenry that contributes to the overall economy, and improves the general quality of life in Idaho.

The Idaho educational system, consisting of the diverse agencies, institutions, school districts, and charter schools governed by the Board; delivers public primary, secondary, and postsecondary education, training, rehabilitation, outreach, information, and research services throughout the state. These public organizations collaborate to provide educational programs and services that are high quality, readily accessible, relevant to the needs of the state, and delivered in the most efficient manner. In recognition that economic growth, mobility, and social justice sustain Idaho’s democratic ideals, the State Board of Education endeavors to ensure our citizens are informed and educated in order to achieve a higher quality of life and effectively participate in a democratic society.

### **Core Functions/Idaho Code**

The Idaho State Constitution and Idaho Code charges the State Board of Education (Board) with providing general supervision, governance and control of all educational institutions and agencies supported in whole or in part by the state, which includes public schools, colleges and universities, Division of Professional-Technical Education, Idaho Public Television, and the Division of Vocational Rehabilitation. The Board is composed of eight members. Seven are citizen members appointed by the governor. The eighth is the state superintendent of public instruction who serves as an *ex officio* member.

The Board is responsible for general supervision and oversight of more than 30 agencies, institutions, health, and special programs; which are as follows:

- 1) Boise State University
  - a) Small Business Development Center
  - b) Tech Help
- 2) Idaho State University
  - a) ISU - Family Medicine Residency
  - b) Idaho Dental Education Program
  - c) Museum of Natural History
- 3) Lewis-Clark State College
- 4) University of Idaho
  - a) WI (Washington-Idaho) Veterinary Medicine Program
  - b) WAMMI Medical Education
  - c) Agriculture Research and Extension
  - d) Forest Utilization Research
  - e) Idaho Geological Survey
- 5) Eastern Idaho Technical College
- 6) College of Southern Idaho
- 7) College of Western Idaho
- 8) North Idaho College
- 9) State Department of Education
- 10) Idaho Division of Professional-Technical Education
- 11) Idaho Public Television
- 12) Idaho Division of Vocational Rehabilitation
- 13) Special and Health Programs:
  - a) Special Programs, Scholarships and Grants
  - b) Health Programs, Western Interstate Commission for Higher Education (WICHE) Professional Student Exchange Program



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
**OCTOBER 17, 2012**

- c) Health Programs, University of Utah School of Medicine
- d) Health Programs, Family Medicine Residency of Idaho

**Revenue and Expenditures**

<b>Revenue</b>	<b>FY 2009<sup>1</sup></b>	<b>FY 2010<sup>1</sup></b>	<b>FY 2011<sup>1</sup></b>	<b>FY 2012<sup>1</sup></b>
General Fund	\$4,809,900	\$2,047,700	\$2,025,200	\$2,108,900
Federal Grant	\$8,685,300	\$1,706,200	\$1,323,400	\$1,996,400
Misc. Revenue	<u>\$161,000</u>	<u>\$128,100</u>	<u>\$140,300</u>	<u>\$217,200</u>
<b>Total</b>	<b>\$13,656,200</b>	<b>\$3,882,000</b>	<b>\$3,488,900</b>	<b>\$4,322,500</b>
<b>Expenditure</b>	<b>FY 2009<sup>2</sup></b>	<b>FY 2010<sup>2</sup></b>	<b>FY 2011<sup>2</sup></b>	<b>FY 2012<sup>3</sup></b>
Personnel Costs	\$1,826,080	\$1,561,200	\$1,586,600	\$1,791,900
Operating Expenditures	\$8,359,065	\$747,100	\$998,300	\$1,515,500
Capital Outlay	\$0	\$0	\$68,500	\$1,000
Trustee/Benefit Payments	\$419,617	\$452,700	\$596,400	\$303,000
Lump Sum	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<b>Total</b>	<b>\$10,604,762</b>	<b>\$2,761,000</b>	<b>\$3,249,800</b>	<b>\$3,606,400</b>

Revenue Notes:

<sup>1</sup> FY 2007-2012 Revenues from Legislative Fiscal Report Total Appropriation (\$5M was removed from general fund appropriation in FY 2008 for CWI appropriation)

Expenditure Notes:

<sup>2</sup> FY 2007-2011 Expenditure from Legislative Fiscal Report Total Actual (\$5M was removed from general fund expenditure in FY 2008 for CWI appropriation)

<sup>3</sup> FY 2012 Expenditure from Statewide Accounting and Reporting System (STARS)

**Health Education Programs Revenue and Expenditures**

<b>Revenue</b>	<b>FY 2009<sup>1</sup></b>	<b>FY 2010<sup>1</sup></b>	<b>FY 2011<sup>1</sup></b>	<b>FY 2012<sup>1</sup></b>
WI	\$1,870,700	\$1,282,900	\$1,822,500	\$1,811,300
WWAMI	\$4,088,200	\$4,071,300	\$4,152,400	\$4,119,500
IDEP	\$1,491,200	\$1,575,500	\$1,712,800	\$1,861,900
WICHE	\$242,200	\$245,800	\$218,600	\$188,200
University of Utah	\$1,225,800	\$1,200,000	\$1,204,200	\$1,242,400
FMR-ISU	\$745,500	\$870,900	\$877,200	\$857,300
FMR-OSBE	\$888,400	\$1,106,000	\$1,106,000	\$1,080,900
Psych Residency	<u>\$81,900</u>	<u>\$104,800</u>	<u>\$114,000</u>	<u>\$111,400</u>
<b>Total</b>	<b>\$10,633,900</b>	<b>\$11,003,200</b>	<b>\$11,207,700</b>	<b>\$11,272,900</b>
<b>Expenditure</b>	<b>FY 2009<sup>2</sup></b>	<b>FY 2010<sup>2</sup></b>	<b>FY 2011<sup>2</sup></b>	<b>FY 2012<sup>3</sup></b>
WI	\$1,870,700	\$1,828,900	\$1,822,500	\$1,811,300
WWAMI	\$3,782,500	\$4,071,300	\$3,921,400	\$3,451,600
IDEP	\$1,270,900	\$1,350,800	\$1,395,100	\$1,522,800
WICHE	\$236,800	\$245,800	\$218,600	\$172,400
University of Utah	\$1,107,900	\$1,199,900	\$1,204,200	\$1,240,300
FMR-ISU	\$745,500	\$870,900	\$877,200	\$853,100
FMR-OSBE	\$888,400	\$1,106,000	\$1,106,000	\$1,080,900
Psych Residency	<u>\$81,900</u>	<u>\$104,800</u>	<u>\$114,000</u>	<u>\$111,400</u>
<b>Total</b>	<b>\$9,984,600</b>	<b>\$10,778,400</b>	<b>\$10,659,000</b>	<b>\$10,243,800</b>

Revenue Notes:

<sup>1</sup> FY 2007-2012 Revenues from Legislative Fiscal Report Total Appropriation

Expenditure Notes:

<sup>2</sup> FY 2007-2011 Expenditure from Legislative Fiscal Report Actual

<sup>3</sup> FY 2012 Expenditure from FY 2012 DFM Actual Expenditures Report (B2)



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**Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>				
	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Idaho Promise Scholarship – A	\$323,500	\$300,000	\$321,500	\$317,000
Idaho Promise Scholarship – B	\$4,803,000	\$3,456,900	\$3,047,000	\$3,634,500
Atwell Parry Work Study Program	\$1,341,500	\$1,181,300	\$1,163,200	\$186,027
Minority/ "At Risk" Scholarship	\$109,500	\$105,000	\$102,000	\$105,000
Teachers/Nurses Loan Forgiveness	\$192,300	\$349,900	\$25,100	\$225,00
Grow Your Own Teacher Scholarship	\$337,800	\$305,100	\$315,900	\$364,000
Leveraging Education Assistance Program <sup>1, 2</sup>	\$611,700	\$611,700	\$606,100	\$711,700
Special Leveraging Education Assistance Program <sup>1, 2</sup>	\$100,000	\$99,900	\$99,100	\$0
Byrd Honors <sup>1, 2</sup>	\$208,500	\$205,100	\$238,500	\$0
Opportunity Scholarship	\$1,777,000	\$976,900	\$248,900	\$1,000,000
Number of K-12 Student Assessments Overseen by the Board				
- Scored in Reading	144,284	146,437	146,576	150,462
- Scored in Math	144,656	146,720	146,731	150,557
- Scored in Language	144,293	146,422	146,671	150,459
Annual Enrollment Headcount <sup>3</sup>				
- Professional Technical	4,676	3,384	3,818	4,006
- Undergraduate	48,527	50,302	51,015	52,519
- Graduate	13,753	14,619	14,849	13,437
- Professional	332	347	372	382
Annual Credit Hours <sup>3</sup>				
- Professional Technical	48,212	51,880	49,026	48,189
- Undergraduate	1,006,500	1,036,902	1,063,282	1,073,406
- Graduate	70,880	78,595	132,007	126,584
- Professional	10,796	11,413	10,891	12,633
Annual Advanced Opportunities Enrollment Headcount				
- Dual Credit	5,973	7,317	8,039	9,614
- Tech Prep	12,598	13,831	15,962	14,875
- AP Enrollment <sup>4</sup>	24,448	23,220	20,242	17,512
- AP Examinations	7,044	8,120	8,380	**
Health Education Compacts				
- Idaho Students Enrolled in University of Utah Medical School	32	32	32	32
- Students Enrolled in WICHE Programs	8	8	6	4
Residency Programs				
- Family Medicine Residency of Idaho Graduates Training/Practicing in Idaho	56%	56%	55%	54%
- Idaho Students Enrolled in Psychiatry Residency Program	9	9	11	11

\* FY2008 was the first year the Opportunity Scholarship was offered.

\*\* Data not available at time of reporting.

<sup>1</sup> These amounts include general fund and federal fund expenditures.

<sup>2</sup> The Federal funding for the LEAP and SLEAP scholarships was eliminated in FY 2011. For FY 2012, only the Idaho portion was distributed to institutions. For FY 2013, the funds have been redistributed to other need-based state programs.

<sup>3</sup> These numbers are duplicated and represent the combined total for Boise State University, Idaho State University, Lewis-Clark State College, and the University of Idaho.



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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<sup>4</sup> These counts represent the number of students enrolled in AP courses. As such, there is duplication since students can take more than one AP course per year. 2011-2012 was the first year the AP data were collected, refined, and reported out of the K-12 Statewide Longitudinal Data System. As such, the 2011-2012 count should be considered the new baseline for this metric.

**Performance Measure Highlights:**

In 2010, the Idaho State Board of Education established an attainment goal that 60% of Idaho's 25 to 34 year olds would have a postsecondary degree or certificate of one academic year or greater by 2020. Subsequent to the Board adopting the 60% attainment goal, in August 2011 Board Staff presented revised degree completion projections and proposed possible strategies to aid the state in meeting the 60% attainment goal. In October 2011, a team of individuals that consisted of Idaho legislators, Governor's office staff, institutional VPs/Provosts, a member of the Board, a representative from the business community, and Board office staff attended the Complete College America Annual Convening and Completion Academy. The purpose of Idaho's participation in such an Academy was to draft a proposed statewide plan to move the state closer to its 60% attainment goal. In December 2011, the Board approved the framework for Complete College Idaho: A Plan for Growing Talent to Fuel Innovation and Economic Growth in the Gem State (CCI Plan); staff then garnered both public and private input throughout the state regarding the proposed CCI Plan.

**Part II – Performance Measures**

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	2016 Benchmark
Number of Scholarships Applicants					
Idaho Promise A	1,107	1,046	936	937	Of the total number of applicants, at least 70% will fully complete their application
Idaho Promise B	8,500	7,067	7,884	7,740	
Robert C. Byrd Honors Opportunity	1,301	1,301	1,290	1,287	
	N/A	N/A	N/A	1,492	
Number of New Scholarships Awarded					
- Idaho Promise A	26	31	26	45	Award at least 75% of total dollars available; no more than 25% will be held for scholarship renewals
- Idaho Promise B	8,500	7,067	7,884	7,740	
- Robert C. Byrd Honors <sup>1</sup>	38	54	53	0	
- Opportunity <sup>2</sup>	919	339	127	315	
Percent of Students Receiving Proficient or Advanced on ISAT:					
- 5 <sup>th</sup> Grade Reading	86.40%	88.00%	88.10%	87.80%	100% for all subject areas
- 5 <sup>th</sup> Grade Mathematics	77.90%	79.80%	80.90%	78.60%	
- 5 <sup>th</sup> Grade Language Usage	77.20%	77.20%	78.70%	79.40%	
- 10 <sup>th</sup> Grade Reading	NA <sup>3</sup>	86.40%	87.20%	87.60%	
- 10 <sup>th</sup> Grade Mathematics		76.80%	78.50%	78.00%	
- 10 <sup>th</sup> Grade Language Usage		71.50%	72.60%	76.60%	
Percent of Schools Meeting AYP:					AYP Proficiency and above Targets are
- Reading	88.15%	92.10%	92.70%	N/A <sup>5</sup>	<u>SY2011-12</u> <sup>6</sup> <u>2012-13</u> <u>2013-14</u>
- Mathematics	81.57%	88.20%	88.40%		85.6% 90.4% 100%
- Language Usage <sup>4</sup>	76.17%	84.20%	87.96%		83.0% 88.7% 100%
					75.1% 83.4% 100%



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	2016 Benchmark
- Average Composite ACT Score of Graduating Secondary Students	21.6	21.8	21.7	21.6	24.0
- Number of Students Taking ACT	10,228	10,647	11,321	11,842	
- Average Composite Score of Graduating Secondary Student Taking SAT <sup>7</sup>	1,597	1,602	1,599	1,609	1,550 ( <i>National benchmark set by the College Board</i> )
- Number of Students Taking SAT <sup>7</sup>	2,517	2,585	2,975	2,925	
High School Graduation Rate <sup>8, 9</sup>	91.69%	92.40%	93.00%	N/A	90.00%
Number of first time, full time students who enrolled in an Idaho public postsecondary institution within 12 months of graduation from an Idaho high school <sup>9, 10, 11</sup>	5,717	5,836	5,811	6,069	60% of Idaho High School Graduates ( <i>approx. 10,050 in School Year 2008-2009</i> )
2-Year Institution Remediation Rate <sup>9, 11</sup>	73.0%	65.5%	72.7%	74.7%	<55%
4-Year Institution Remediation Rate <sup>9, 11</sup>	27.7%	24.2%	26.6%	26.2%	<20%
Number of Postsecondary Certificates & Degrees Earned <sup>10</sup>	8,446	8,307	8,833	9,487	15,000

**Performance Measure Explanatory Note:**

<sup>1</sup> No longer funded.

<sup>2</sup> There were no new Opportunity Scholarships offered in FY2011. The 127 scholarships noted here were full and partial renewals of previous year's awards.

<sup>3</sup> During Academic Year 2009, the majority, but not all students took the ISAT in the fall of 2008 and "banked" their scores until the spring 2009. Others took the exam in the spring of 2009 as expected. Thus, this 10<sup>th</sup> Grade cohort's testing was atypical and not comparable to surrounding years.

<sup>4</sup> Graduation rate is the third indicator for high schools. Language usage is the third indicator for K through 9<sup>th</sup> grades.

<sup>5</sup> Idaho has applied for an Elementary and Secondary Education Waiver that will allow the state to waive No Child Left Behind AYP determinations and targets for at least the 2011-2012 School Year. The SDE is negotiating with the U.S. Dept. of Education on the approval of this waiver at the time of this report.

<sup>6</sup> Idaho has received Federal approval to hold over 2010-2011 AYP targets for FY 2011-2012, which is the 4<sup>th</sup> year these AYP targets have been held over for Idaho.

<sup>7</sup> The Idaho State Board of Education does not have any SAT measures as part of its Strategic Plan as of August 2012.

<sup>8</sup> Graduation rate for a year is not determined until after summer and fall (late) graduations, as well as the close of the appeals process in January of the following year.

<sup>9</sup> Does not include Idaho private, parochial, GED or home schooled graduates.

<sup>10</sup> This data is combined data for Boise State University, Idaho State University, University of Idaho, and Lewis-Clark State College, as reported by those institutions in their Performance Measure Reports.

<sup>11</sup> Total number of 1<sup>st</sup>-time 1<sup>st</sup>-year students who graduated high school within the previous 12-months enrolled in an Idaho public institution.



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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**For More Information Contact**

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**IDAHO STATE BOARD OF EDUCATION  
2013-2017  
Strategic Plan**

An Idaho Education: High Potential – High Achievement



**VISION**

The State Board of Education envisions an accessible, seamless public education system that results in a highly educated citizenry.

**MISSION**

To provide leadership, set policy, and advocate for transforming Idaho's educational system to improve each Idaho citizen's quality of life and enhance global competitiveness.

**AUTHORITY AND SCOPE:**

The Idaho Constitution provides that the general supervision of the state educational institutions and public school system of the State of Idaho shall be vested in a state board of education. Pursuant to Idaho Code, the State Board of Education is charged to provide for the general supervision, governance and control of all state educational institutions, and for the general supervision, governance and control of the public school systems, including public community colleges.

**State Board of Education Governed  
Agencies and Institutions:**

<b>Educational Institutions</b>	<b>Agencies</b>
Idaho Public School System	Office of the State Board of Education
Idaho State University	Division of Professional-Technical Education
University of Idaho	Division of Vocational Rehabilitation
Boise State University	Idaho Public Broadcasting System
Lewis-Clark State College	State Department of Education
Eastern Idaho Technical College	
College of Southern Idaho*	
North Idaho College*	
College of Western Idaho*	
*Have separate, locally elected oversight boards	



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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**GOAL 1: A WELL EDUCATED CITIZENRY**

*The educational system will provide opportunities for individual advancement.*

**Objective A: Access** - Set policy and advocate for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.

**Performance Measures:**

- Annual amount of state generated need-based financial aid from Opportunity, LEAP, and SLEAP Scholarships.  
**Benchmark:** \$10M
- Annual number of merit and need based state funded scholarships awarded and total dollar amount.  
**Benchmark:** 20,000, \$16M
- Amount of need-based aid per student.  
**Benchmark:** \$489 (2008-09 per undergraduate FTE WICHE Average)
- Postsecondary student enrollment by race/ethnicity/gender as compared against population.  
**Benchmark:** 65,000 students for White & White, non-Hispanic; 21,000 students for all other race/ethnicities.

**Objective B: Higher Level of Educational Attainment** – Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system.

**Performance Measures:**

- High School Graduation rate as defined in the Accountability Workbook.  
**Benchmark:** 90%
- Percent of High School graduates who enroll in postsecondary education within 12 months of graduation  
**Benchmark:** 60%
- Percent of Idahoans (ages 25-34) who have a college degree or certificate.  
**Benchmark:** 60% by 2020



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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- Percent of high school students enrolled and number of credits earned in Dual Credit (tied to HS enrollment, based on trend):
  - Dual credit  
**Benchmark:** 25% students per year  
**Benchmark:** 180,000 credits per year
  - Tech prep  
**Benchmark:** 27% students per year
- Percent of high school students taking Advanced Placement (AP) exams and number of exams taken each year.  
**Benchmark:** 10% students per year  
**Benchmark:** 9,000 exams taken per year

**Performance Measures:**

- Percentage of first-year freshmen returning for second year.  
**2-year Institution Benchmark:** 60%  
**4-year Institution Benchmark:** 70%

**Objective C: Adult learner Re-Integration** – Improve the processes and increase the options for re-integration of adult learners into the education system.

**Performance Measures:**

- Number of Bridge programs.  
**Benchmark:** 6
- Number of adults enrolled in upgrade and customized training (including statewide fire and emergency services training programs).  
**Benchmark:** 52,500

**Objective D: Transition** – Improve the ability of the educational system to meet educational needs and allow students to efficiently and effectively transition into the workforce.

**Performance Measures:**

- Number of degrees conferred in STEM fields.  
**Benchmark:** 2,177 degrees
- Number of University of Utah Medical School graduates who are residents in one of Idaho's graduate medical education programs.  
**Benchmark:** 8 graduates at any one time
- Percentage of Boise Family Medicine Residency graduates practicing in Idaho.  
**Benchmark:** 60%
- Percentage of Psychiatry Residency Program graduates practicing in Idaho.  
**Benchmark:** 50%



- Number of students enrolled in WICHE Professional Student Exchange Program.  
**Benchmark:** 8

**GOAL 2: CRITICAL THINKING AND INNOVATION**

*The educational system will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of individuals who are entrepreneurial, broadminded, think critically, and are creative.*

**Objective A: Critical Thinking, Innovation and Creativity** – Increase research and development of new ideas into solutions that benefit society.

**Performance Measures:**

- Institution funding from competitive Federally funded grants  
**Benchmark:** \$112M
- Institution funding from competitive industry funded grants  
**Benchmark:** \$7.2M

**Objective B: Innovation and Creativity** – Educate students who will contribute creative and innovative ideas to enhance society.

**Performance Measures:**

- Percentage of students participating in internships or undergraduate research  
**Benchmark:** 30%

**Objective C: Quality Instruction** – Increase student performance through the recruitment and retention of a diverse and highly qualified workforce of teachers, faculty, and staff.

**Performance Measures:**

- Percent of student meeting proficient or advance placement on the Idaho Standards Achievement Test.  
**Benchmark:** 100% for both 5<sup>th</sup> and 10<sup>th</sup> Grade students in Reading, Mathematics, Language, and Science subject areas.
- Average composite ACT score of graduating secondary students.  
**Benchmark:** 24.0
- Percent of elementary and secondary schools meeting adequate yearly progress (AYP) in each of Reading, Mathematics, and Language subject areas.  
**Benchmark:** 100%

**GOAL 3: Effective and Efficient Delivery Systems** – *Ensure educational resources are used efficiently.*



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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**Objective A: Cost Effective and Fiscally Prudent** – Increased productivity and cost-effectiveness.

**Performance Measures:**

- Cost per credit hour to deliver undergraduate instruction at 4-year institutions.

**Benchmark:** Less than or equal to their peer group average

- Average number of credits earned at completion of a degree program.

**Benchmark:** Associates - 60

**Benchmark:** Bachelors – 140

- Percent of postsecondary first time freshmen who graduated from an Idaho high school in the previous year requiring remedial education in math and language arts.

**Benchmark:** 2 year – less than 55%

**Benchmark:** 4 year – less than 20%

- Institutional reserves comparable to best practice.

**Benchmark:** A minimum target reserve of 5% of operating expenditures.

**Objective B: Data-driven Decision Making** - Increase the quality, thoroughness, and accessibility of data for informed decision-making and continuous improvement of Idaho's educational system.

**Performance Measures:**

- Develop P-20 to workforce longitudinal data system with the ability to access timely and relevant data.

**Benchmark:** Completed by 2015.

**Objective C: Administrative Efficiencies** – Create cross institutional collaboration designed to consolidate services and reduce costs in non-competitive business processes.

**Performance Measures:**

Number of collaborative projects and amount of cost savings.

**Benchmark:** 10



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**SUBJECT**

Idaho Public Education Institution's & Agency's Performance Measure Report

**REFERENCE**

October 2009	Board reviewed performance measures for the period from FY 2006 through FY 2009.
December 2009	The Board approved its strategic plan, including performance measures for the next four years.
October 2010	Board reviewed performance measures for the period from FY 2007 through FY 2010.
December 2010	The Board approved its strategic plan, including performance measures for the next four years.
June 2011	The Board discussed the desire to further evaluate the performance measures included in the Board's and the institution's and agency's strategic plans.
October 2011	Board reviewed performance measures for the period from FY 2008 through FY 2011.
June 2012	The Board approved the institutions updated strategic plans, including performance measures for the next four years.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section I.M, Section 67-1901 through 1905, Idaho Code

**BACKGROUND/DISCUSSION**

The performance measure data are presented to provide a general overview of the progress of the state public education system under the purview of the Board is making toward the Board's Strategic Plan. This presentation is meant to demonstrate the overall cumulative progress being made toward the Board's strategic goals and objectives.

Discussion following the presentation will give the Board members the opportunity to ask questions regarding the progress toward each institutions goals, determine if they are the performance measures used adequately measure progress toward the goals and identify additional measures to include in future institution strategic plans. The Board will have the opportunity to approve updated strategic plans for the institutions and agencies under the Board at the April and June Board meetings.

**IMPACT**

The data included in this presentation will be used by the Board, institutions, and agencies to direct their future strategic planning efforts.



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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**ATTACHMENTS**

**Institution and Agency Reports**

Attachment 1 – Division of Professional-Technical Education	Page 5
Attachment 2 – Eastern Idaho Technical College	Page 9
Attachment 3 – College of Southern Idaho	Page 11
Attachment 4 – College of Western Idaho	Page 18
Attachment 5 – North Idaho College	Page 26
Attachment 6 – University of Idaho	Page 31
Attachment 7 – Boise State University	Page 36
Attachment 8 – Idaho State University	Page 42
Attachment 9 – Lewis-Clark State College	Page 48
Attachment 10 – Idaho Public Television	Page 54
Attachment 11 – Idaho Division of Vocational Rehabilitation	Page 58
Attachment 12 – Idaho Department of Education	Page 64

**Special and Health Programs**

Attachment 13 – Agricultural Research and Extension Service	Page 67
Attachment 14 – Family Medical Residency	Page 70
Attachment 15 – Forest Utilization Research	Page 73
Attachment 16 – Idaho Dental Education Program	Page 80
Attachment 17 – Idaho Geological Survey	Page 83
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**STAFF COMMENTS AND RECOMMENDATIONS**

The Board approves the institution and agencies strategic plans at the June Board meeting; the strategic plan includes performance measures and benchmarks. In September of each year the Board and the institutions and agencies under the Board are required to select performance measures from their strategic plans and submit them to the Division of Financial Management (DFM). DFM then provides the report to the Governor and the legislature as well as posting them on their website. The performance measures provided in the Performance Measure Report are performance measures approved by the Board when the Board approved the strategic plans.

During the October 2011 Board meeting the Board requested the institutions strategic plans contain a few performance measures that are consistent across the public postsecondary educational system. The institutions included these measures in their strategic plans that were approved by the Board at the June 2012 Board meeting. The performance measures presented to the Board at the October 2012 Board meeting are for the strategic plans approved in 2011, data for the new measures will be presented to the Board at the October 2013 Board meeting.



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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The Division of Professional-Technical Education (PTE) and each institution will provide a short presentation to the Board highlighting those performance measures that show the institutions progress toward the Board's completion goal. All of the institutions, agencies, and special/health programs under the purview of the Board performance measure reports are included in the attached material.

**BOARD ACTION**

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



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## Idaho Division of Professional-Technical Education

Performance Measurement Report

### ***Part 1 – Agency Profile***

#### **Agency Overview**

The mission of the Professional-Technical Education system is to provide Idaho's youth and adults with technical skills, knowledge, and attitudes necessary for successful performance in a highly effective workplace.

Idaho Code §33-2202 defines Professional-Technical Education as “secondary, postsecondary and adult courses, programs, training and services administered by the Division of Professional-Technical Education for occupations or careers that require other than a baccalaureate, masters or doctoral degree. The courses, programs, training and services include, but are not limited to, vocational, technical and applied technology education. They are delivered through the professional-technical delivery system of public secondary and postsecondary schools and colleges.”

The Division of Professional-Technical Education is the administrative arm of the State Board for Professional-Technical Education that provides leadership, advocacy and technical assistance for professional-technical education in Idaho, from secondary students through adults. This includes responsibilities for Adult Basic Education/GED programs, the State Wellness program, state employee training including the Certified Public Manager program, and the S.T.A.R. Motorcycle Training program.

The Division is responsible for preparing and submitting an annual budget for professional-technical education to the State Board, Governor and Legislature. Funds appropriated to the Division of Professional-Technical Education include state general funds, federal funds, dedicated funds and miscellaneous receipts.

Professional-technical education programs are integrated into a larger, educational structure through public school districts, colleges, and universities. The Division provides the focus for professional-technical education within existing schools and institutions by targeting resources, organizing and applying industry input, managing programs and providing leadership for student organizations.

Secondary professional-technical education programs and services are provided through junior high/middle schools, comprehensive high schools, professional-technical schools, and through cooperative programs with the technical college system.

Professional-technical education programs and services are delivered through the state's technical college system. Three of the technical colleges are located on the campus of community colleges: College of Southern Idaho, College of Western Idaho, and North Idaho College. Two are on the campus of four-year institutions: Idaho State University and Lewis and Clark State College. One is a stand-alone institution: Eastern Idaho Technical College. The technical college system delivers certificate and A.A.S. degree occupational programs on a full or part-time basis; workforce/short-term training; Adult Basic Education; displaced homemaker services; and emergency services training.

The State Administrator of the Division of Professional-Technical Education is Todd Schwarz. The agency has 37 FTP employees. Seven are federally funded, 27 are funded through the state general fund and 3 are funded through a dedicated fund. The Division also includes 484 technical college FTP's in its budget.

#### **Core Functions/Idaho Code**

Statutory authority for the Division of Professional-Technical Education is delineated in Idaho Code, Chapter 22, §§ 33-2201 through 33-2212 and IDAPA 55. Idaho Code §33-1002G allows school districts to establish professional-technical schools and §39-5009 established the displaced homemaker account for appropriation to the State Board. The role of the Division of Professional-Technical Education (IDAPA 55) is to administer professional-technical education in Idaho. Specifically, the Division:

- Provides statewide leadership and coordination for professional-technical education;
- Assists local educational agencies in program planning, development, and evaluation;
- Promotes the availability and accessibility of professional-technical education;



## Idaho Division of Professional-Technical Education

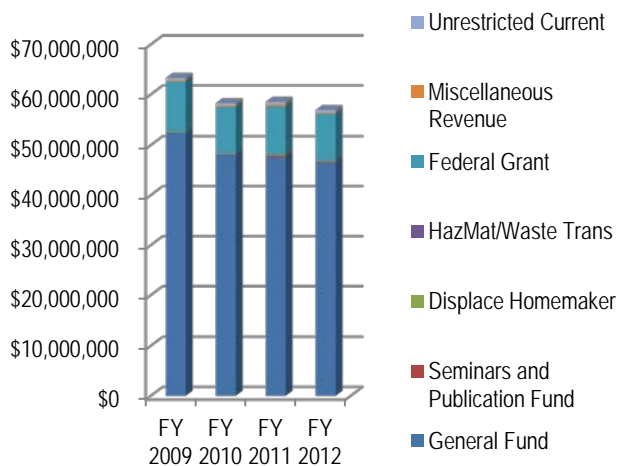
Performance Measurement Report

- Prepares annual and long-range state plans;
- Prepares an annual budget to present to the State Board and the Legislature;
- Provides a state finance and accountability system for professional-technical education;
- Evaluates professional-technical education programs;
- Initiates research, curriculum development, and professional development activities;
- Collects, analyzes, evaluates, and disseminates data and program information;
- Administers programs in accordance with state and federal legislation;
- Coordinates professional-technical education related activities with other agencies, officials, and organizations.

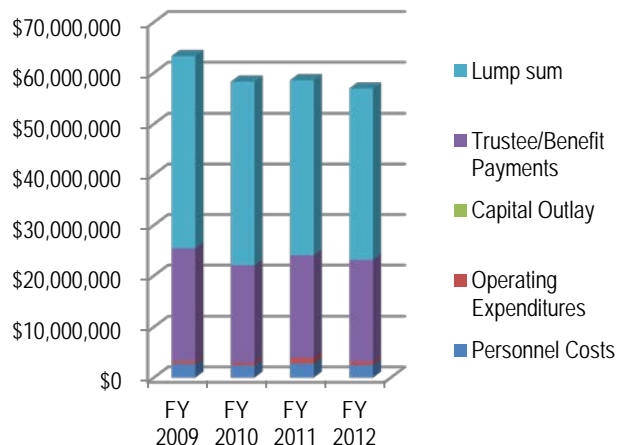
### Revenue and Expenditures

Revenue	FY 2009	FY 2010	FY 2011	FY2012
General Fund	\$52,528,500	\$48,211,700	\$47,577,400	\$46,511,600
Seminars and Publication Fund	\$0	\$0	\$287,400	\$140,000
Displaced Homemaker	\$170,000	\$170,000	\$170,000	\$170,000
Haz Mat/Waste Trans	\$67,800	\$67,800	\$67,800	\$67,800
Federal Grant	\$9,830,800	\$9,080,600	\$9,593,100	\$9,251,900
Miscellaneous Revenue Fund	\$233,400	\$258,300	\$368,000	\$234,800
Unrestricted Current	\$468,200	\$458,000	\$467,000	\$520,000
<b>Total</b>	<b>\$63,298,700</b>	<b>\$58,246,400</b>	<b>\$58,530,700</b>	<b>\$56,896,100</b>
Expenditures	FY 2009	FY 2010	FY2011	FY2012
Personnel Costs	\$2,682,200	\$2,415,900	\$2,787,100	\$2,496,300
Operating Expenditures	\$496,900	\$475,600	\$1,048,900	\$673,500
Capital Outlay	\$51,800	\$0	\$0	\$0
Trustee/Benefit Payments	\$22,190,000	\$19,221,200	\$20,234,900	\$19,973,200
Lump Sum	\$37,877,800	\$36,133,700	\$34,459,800	\$33,753,100
<b>Total</b>	<b>\$63,298,700</b>	<b>\$58,246,400</b>	<b>\$58,530,700</b>	<b>\$56,896,100</b>

Revenue



Expenditures





**Idaho Division of Professional-Technical Education**

Performance Measurement Report

**Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Number of Students Enrolled in High School PTE Programs (headcount)	86,955	89,322	87,256	85,490
Number of Students Enrolled in Postsecondary PTE Programs (headcount)	8,571	9,929***	9,034	8,815
Number of Technical College FTE enrollments	4137	4585***	4588	4,483
Number of Adults Enrolled in Upgrade and Customized Training (headcount)	46,748	46,086	44,295	42,119
Number of Adults Enrolled in Statewide Fire and Emergency Services Training Programs (headcount)	4,807	4,446	6,965	*
Number of clients served in the ABE program (headcount)	7,535 ◇	7,396 ◇	6,669 ◇	6,330 ◇
Number of Adults Served in the Displaced Homemaker Program (Center for New Directions)	784	829	909	1038
Number of state employees enrolled in the Certified Public Manager (CPM) Program	83	87	79	78
State Wellness Program monthly average website hits	5,065	6,384	5,199	5,236

\* Data not available at this printing

\*\*\*Changes in FY10 numbers were due to ISU's amended enrollment report from their new ERP system

◇ Changes in ABE numbers reflect one year (FY09) that are final numbers and three (FY2010-FY2012) that reflect August 15 numbers.

**Performance Highlights**

**ABE – Bridge Programs.** To increase the options for re-integration of adult learners into the professional-technical educational (PTE) system, Adult Basic Education (ABE) is working with the technical colleges on PTE Bridge programs for ABE students. Currently, PTE Bridge programs include the following three criteria: (1) Includes an ABE instructor and a PTE instructor either co-teaching in the same classroom or conducting ongoing co-planning. (2) Uses the technical curriculum designed for the technical program. (3) Will not add time to what it would normally require of a student to complete the course. For the FY2012 school year, Bridge programs served 180 adults at a cost of about \$215 per student. The positive results from this first full year has guided the planning on expanding the Bridge program opportunities for the FY2013 school year.

**Part II – Performance Measures**

<b>Performance Measure</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>Benchmark</b>
Number of PTE concentrators who take a Technical Skill Assessment (TSA)	1,821	3,874	5,357	Numbers reported in Nov.	Increase 10% each year
Number of ABE clients who met their stated goal	2,437	2,699	3,372	Numbers reported in Nov.	Increase 2% each year



Idaho Division of Professional-Technical Education

Performance Measurement Report

Percentage of Technical College PTE completers who achieve a positive placement or transition *	93%	90%	91%	91%	Placement at 90% or higher
Number of secondary PTE completers who transition to postsecondary education or training **	63%	66%	66%	64%	Exceed National Center for Higher Education Management System rankings in Idaho

**Performance Measure Explanatory Note:**

- \* A technical college PTE completer is a postsecondary student who has completed all the requirements for a certificate or an AAS degree in a state approved professional-technical education program. This person must have met all the requirements of the institution for program completion, whether or not the person officially graduated from the institution. Positive placement represents the percent of technical college completers who attain employment, join the military, or continue their education within six (6) months of completing.
- \*\* A secondary PTE completer is a junior or senior student who: (1) has completed four state approved PTE courses in a program sequence which includes a capstone course; OR (2) who has completed all the PTE courses in a program sequence if three or less, OR (3) who is enrolled in a state approved Professional-Technical School and is enrolled in a capstone course. Transition to postsecondary education or training is determined by an annual follow-up report of secondary PTE completers who are seniors and graduated. The overall state rate of 49.1% is from The National Center for Higher Education Management Systems (NCHEMS) Information Center "College-Going Rates of High School Graduates Directly from High School"

**For More Information Contact**

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# Eastern Idaho Technical College

Performance Measurement Report – July 2012

## Part I – Agency Profile

### Agency Overview

Eastern Idaho Technical College (EITC) provides high quality educational programs that focus on the needs of the community for the 21st century. EITC is accredited by the Northwest Commission on Colleges and Universities (NWCCU). The College is a State supported technical college created in 1969 to serve citizens in its service area by being a minimal cost, open-door institution that champions technical programs, customized industry training, basic skills instruction, workforce and community education, on-line distance education, and student services.

### Core Functions/Idaho Code

Eastern Idaho Technical College was created to provide professional-technical postsecondary educational opportunities. Idaho Statute Title 33, Chapter 2208.

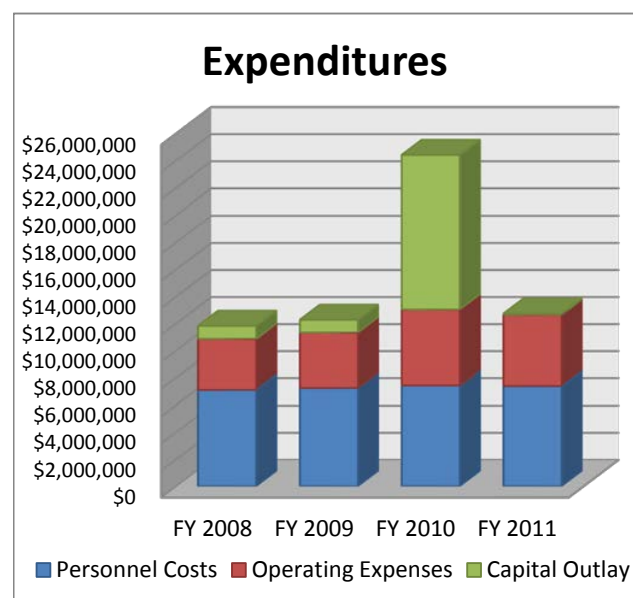
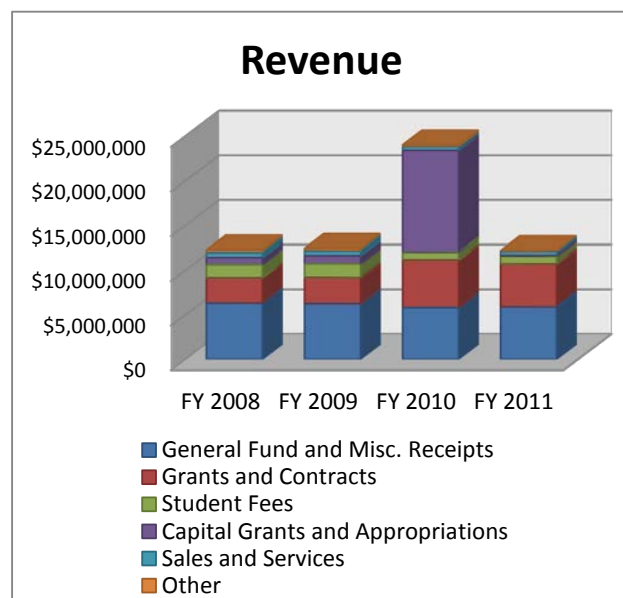
### Revenue and Expenditures:

Revenue	FY 2009	FY 2010	FY 2011	*FY 2012
General Fund and Misc. Receipts	\$6,248,562	\$5,811,840	\$5,883,820	\$5,643,000
Grants and Contracts	\$2,921,137	\$5,330,368	\$4,819,846	\$4,700,000
Student Fees	\$1,554,161	\$875,627	\$861,099	\$825,000
Capital Grants and Appropriations	\$897,322	**\$11,385,642	\$84,780	***(\$9,700,000)
Sales and Services	\$528,350	\$422,751	\$452,708	\$425,000
Other	\$273,887	\$195,966	\$77,640	\$75,000
<b>Total</b>	<b><u>\$12,423,419</u></b>	<b><u>\$24,022,194</u></b>	<b><u>\$11,979,893</u></b>	<b><u>\$1,968,000</u></b>
Expenditure	FY 2009	FY 2010	FY 2011	*FY 2012
Personnel Costs	\$7,219,501	\$7,411,267	\$7,361,489	\$7,350,000
Operating Expenses	\$4,106,574	\$5,613,933	\$5,277,266	\$5,300,000
Capital Outlay	\$940,593	\$11,385,642	\$84,780	(\$9,700,000)
<b>Total</b>	<b><u>\$12,266,668</u></b>	<b><u>\$24,410,842</u></b>	<b><u>\$12,723,535</u></b>	<b><u>\$2,950,000</u></b>

\* Unaudited figures

\*\* Includes Health Education Building (approximately \$10,000,000) based on project closure in FY 2010

\*\*\* Removed Health Education Building (approximately \$10,000,000).based on request by State Controller's Office (SCO) until the building bond held by the Idaho Building Authority is paid off, to prevent duplicate reporting of this building





# Eastern Idaho Technical College

Performance Measurement Report – July 2012

## Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
Annual (unduplicated) Enrollment Headcount - Professional Technical	1,337	1,607	1,432	1,364
Annual Enrollment FTE - Professional Technical	573	650	614	581
Credit Hours Taught	17,196	19,505	17,908	17,437
Degrees/Certificates Awarded - Professional Technical	244	237	238	242
*Workforce Training Headcount	12,076	15,121	13,040	14,143
Number and percentage of Students successfully completing Remedial English & Math Courses	90, 83%	122, 85%	119, 71%	95, 74%

\* Excludes Fire Service Technology courses

## Performance Highlights

- The Practical Nursing Program at EITC was reviewed by the Idaho Board of Nursing and given a continuance of full approval for 8 years.
- The EITC Registered Nursing Program had a 100% pass rate on the NCLEX nursing test.
- EITC served 6,200 INL incumbent workers in Environmental Safety and Health Programs. This number is up from 5,711 in 2011.
- In the EITC Marketing and Management AAS Degree program, students placed first and second in all but two of the twelve events at the Idaho State Collegiate Distributive Education Clubs of America (DECA) Career Development Conference in Twin Falls, Idaho. Ten students qualified to participate in the International Collegiate DECA Career Development Conference.
- The Bridges to Success Program funded by the Albertson Foundation has successfully enrolled 45 students with an overall success rate of 79%.

## Part II – Performance Measures

#	Performance Measure	FY2009	FY2010	FY2011	FY2012	Benchmark
1	Increase reach of EITC Tutoring Center (Goal III, Objective 2)	3,750	5,406	4,870	5,195	4,722
2	Increase reach of Adult Basic Education Division (Goal IV, Objective 1)	800	757	744	647	775
3	Increase reach of Center for New Directions (Goal IV, Objective 2)	625	686	518	411	616

### Part II - Performance Measure Benchmark Explanatory Notes:

Benchmark number 1 measured in contact hours. Benchmark Numbers 2 and 3 measured in number of students  
 Benchmarks Number 1-3 are the average of FY2009, FY2010, and FY2011 plus 1%

#### For More Information Contact

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## College of Southern Idaho

Performance Measurement Report

### ***Part 1 – Agency Profile***

#### **Agency Overview**

The College of Southern Idaho's mission, as a comprehensive community college, is to provide 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.

CSI is accredited by the Northwest Commission on Colleges and Universities (NWCCU), a regional postsecondary accrediting agency recognized by the U.S. Department of Education. Several of CSI's programs are also accredited by the appropriate accrediting agencies, and graduates are eligible to take the qualifying examinations of the respective state and national licensing and registration bodies and join professional organizations.

CSI's service area is defined in Idaho Code as the eight counties of the Magic and Wood River Valleys and a portion of Elmore County. CSI offers its programs and courses at the nearly 350 acre main campus in Twin Falls, as well as at the off-campus centers in Burley (Mini-Cassia Center), Hailey (Blaine County Center), Gooding (North Side Center), and Jerome (Workforce Development Center). Students can choose from a wide range of transfer and professional-technical (PTE) programs – more than 120 program options ranging from certificates to two-year associate degrees. The College offers a growing number of online courses for students who cannot attend traditional face-to-face courses due to family or work responsibilities, and for students who prefer the online learning environment as opposed to the traditional classroom. CSI has a growing and very successful dual credit program. The College demonstrates its commitment to lifelong learning through active community education and workforce training programs. Partnerships with Boise State University, University of Idaho, Idaho State University, and Northwest Nazarene University also give local residents more than two dozen bachelor's and master's degree options without having to leave Twin Falls.

As embodied in Idaho Code, the College of Southern Idaho is governed by a locally elected five member Board of Trustees. Trustees are elected from within the College District comprised of Jerome and Twin Falls counties. Revenue for the operation of the College comes from a combination of sources including tuition and fees, state appropriation, local property taxes, grants, counties not in community college districts, etc. Due to the recession and lower state revenues, state appropriations have decreased significantly and CSI is relying more and more on tuition and fees.

#### College of Western Idaho (CWI) Partnership

CSI continues its partnership with the College of Western Idaho (CWI) in order to assist CWI with meeting standards for accreditation and to help CWI offer college credit instruction, certificates and degrees while seeking accredited status with the Northwest Commission on Colleges and Universities (NWCCU). We reached a major milestone in FY2012: on January 11<sup>th</sup> 2012, NWCCU granted CWI Candidacy for Accreditation status at the associate degree level. Candidacy is not accreditation nor does it ensure eventual accreditation. Candidate for Accreditation is a status of affiliation with the Commission which indicates that the institution has achieved initial recognition and is progressing toward accreditation. Until separate accreditation is granted, CWI will continue to deliver college credit instruction, certificates and degrees through its partnership with CSI.

#### **Core Functions/Idaho Code**

The College of Southern Idaho was established and is governed under Chapter 21 of Title 33, Idaho Code. The College's primary functions may be categorized as: Instructional, Student Support, Financial Support, Administrative, and Community Relations.

##### **Instructional:**

The primary function of the College of Southern Idaho stated in the Idaho Code is "instruction in academic subjects, and in such non-academic subjects as shall be authorized by its board of trustees" (Section 33-2102, Idaho Code). Academic programs are submitted to the Idaho State Board of Education (ISBOE) for approval. The State Board of Education acts under the authority granted in Article IX, Section 2 of the Idaho Constitution and Title 33, Chapter 1, Idaho Code.

##### **Student Support:**

Support for CSI students is delivered through the student services division (Admissions and Records, New Student Services, Advising, Financial Aid and Scholarships, Student Disability Services, Career and Counseling



## College of Southern Idaho

### Performance Measurement Report

Services, Student Activities, Student Health, Child Care Center, Library/ITC) which assists students in seeking access to college programs and services, and promotes student learning, development, and success by providing future and current students with quality information, advice, support, as well as with opportunities for social and cultural development.

#### **Financial Support:**

Also under the authority of the Trustees, financial management of the College's funds is overseen by the Business Office. This office manages the various sources of funds directed to the College, including: state appropriations, tuition and fees, local property taxes, payments from counties not in a community college district, and grants from both public (federal, state, local) and private sources.

#### **Administrative Support and Community Relations:**

The College senior administrative team includes the President of the College, Gerald Beck, Ed.D; Executive Vice President and Chief Academic Officer, Jeff Fox, Ph.D; Vice President of Administration, Mike Mason, CPA/ CMA; and Vice President of Student Services/Planning and Grant Development, Edit Szanto, Ph.D.

### **Revenue and Expenditures**

<b>Revenues</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY2011</b>	<b>FY 2012</b>
General Fund	\$12,302,700	\$10,875,500	\$10,658,200	\$10,243,000
Economic Recovery	\$0	\$0	\$205,400	\$667,700
Liquor Fund	\$200,000	\$197,600	\$200,000	\$200,000
Property Taxes	\$4,385,100	\$4,597,700	\$4,969,100	\$5,229,500
Tuition and Fees	\$7,955,000	\$9,866,800	\$11,075,900	\$11,900,400
County Tuition	\$1,366,400	\$1,499,600	\$1,639,500	\$1,547,900
Misc Revenue	\$2,149,200	\$2,908,500	\$1,710,000	\$1,613,500
<b>Total</b>	<b>\$28,358,400</b>	<b>\$29,945,700</b>	<b>\$30,458,100</b>	<b>\$31,402,000</b>
<b>Expenditures</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY2011</b>	<b>FY 2012</b>
Personnel Costs	20,120,500	20,861,400	21,649,600	22,348,400
Operating Expenditures	4,077,700	4,231,000	4,429,600	4,980,900
Capital Outlay	4,160,200	4,853,300	4,378,900	4,072,700
<b>Total</b>	<b>\$28,358,400</b>	<b>\$29,945,700</b>	<b>\$30,458,100</b>	<b>\$31,402,000</b>

### **Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY2011</b>	<b>FY2012*</b>
<b>PPGA - Work Session</b>				



## College of Southern Idaho

### Performance Measurement Report

Annual (unduplicated) Enrollment <b>Headcount</b>	11,031	13,203	13,740	13,729
Professional Technical	2,019	2,392	1,869	1,881
Transfer	9,012	10,811	11,871	11,848
Annual Enrollment <b>FTE</b>	4,264	5,276.3	5,535.54	5,468.13
Professional Technical	818	1,013.9	1,111.57	1,080.17
Transfer	3,446	4,262.4	4,423.97	4,387.97
<b>Degrees/Certificates</b> Awarded	766	823	966	994
Workforce Training Headcount	5,940	4,861	5,218	4,426
Dual Credit				
- Unduplicated Headcount	1,967	2,460	2,412	2,685
- Enrollments	3,992	4,936	4,576	4,742
- Total Credit Hours	12,084	14,804	13,241	14,187
Remediation Rate				
First-Time, First-Year Students Attending High School within Last 12 Months	74.9%	74.7%	72.3%	67.2%
All Other First-Time, First-Year Students	72.3%	75.5%	76.1%	70.1%
All Other Students	42.2%	49.0%	53.4%	52.5%

\*Data as of August 2012 (not yet final)

### Performance Highlights

#### NWCCU Accreditation

During Spring 2012 CSI submitted its first **Year Three Self-Evaluation Report** under the new NWCCU standards and seven-year process, and hosted evaluators April 16-18. The College received a positive review, with only one recommendation. Through this process CSI re-affirmed its four Core Themes:

- Transfer Education
- Professional-Technical Education
- Basic Skills Education
- Community Connections

CSI is already preparing for the Year Five Self-Evaluation Report which will be due in the Spring of 2014 and will focus on Standard Three (Planning and Implementation) and Standard Four (Effectiveness and Improvement), in addition to reviewing and revising, as necessary, Standards One and Two.

#### College Completion Challenge

On September 19<sup>th</sup> 2011, CSI became the first community college in the state of Idaho to sign the "Accepting the College Completion Challenge: A Call to Action." By signing this call to action, President Beck and members of the Board of Trustees reaffirmed CSI's commitment to improving student success. The document is a declaration of what the College believes in, commits to, and asks of its administration, faculty, staff, students, and community. CSI pledges to do its part to cultivate a culture of success and to help accomplish the national goal of a 50% increase in the number of students with a higher education degree or certificate by 2020. The call to action was supported and encouraged by the American Association of Community Colleges (AACC) and the Association of Community College Trustees (ACCT), in order to advance "the completion agenda." Increasing community college student completion has become a major national, state and local focus, and a key priority.

*"In recognition of the central role that the College of Southern Idaho has in meeting the educational and training needs in our community and, more broadly, in contributing to an educated U.S. citizenry and a competitive workforce, we pledge to do our part to increase the number of Americans with high quality postsecondary degrees and certifications to fulfill critical local, state, and national goals. With the "completion agenda" as a national imperative, the College of Southern Idaho has an obligation to meet the challenge while holding firmly to traditional values of access, opportunity, and quality."*

This signed **Call to Action** commits the College of Southern Idaho to promote the development and implementation of policies, practices, and institutional cultures that will produce 50% more students with high quality degrees and certificates by 2020.



## College of Southern Idaho

### Performance Measurement Report

#### Third NJCAA National Championship – *Go Eagles!*

The College of Southern Idaho Men's Basketball team brought home the school's third NJCAA National Championship in that sport. Guard Pierre Jackson claimed Region 18 Tournament MVP and NJCAA National Tournament MVP as well as NJCAA Player of the Year honors. CSI Head Coach Steve Gosar led the Golden Eagles to a 33-4 overall record, earning NJCAA Coach of the Year accolades.

#### Grants

- **\$2,701,202 - Idaho Ladder to Success** (U.S. Department of Labor - Employment and Training Administration) project is a collaborative effort between College of Southern Idaho, College of Western Idaho, North Idaho College, Lewis-Clark State College, and College of Technology at Idaho State University. CSI leads this partnership with the implementation of programs to accelerate progress for low-skilled and other workers, and strengthen online and technology-enabled learning. Programs in Energy, Advanced Manufacturing, Healthcare, Business, and Information Technology will be enhanced with student support services aimed to promote access, retention, and student success. Additionally, a new program will be launched to provide the training necessary to earn a Physical Therapist Assistant degree. The new program will be delivered through a cooperative agreement with North Idaho College and will include distance, online, and on-site lab and clinical experiences.
- **\$100,000 - CSI Renewable Energy Job Training Program Grant** (U.S. Department of Labor - Employment and Training Administration). Through the CSI Renewable Energy Job Training Program grant, CSI will expand the delivery of high quality renewable energy jobs training. The training program expansions are made possible by funding to secure the required equipment, supplies, and instructor development to provide direct services to individuals to enhance employment opportunities in the growing sustainable energy sector. Expanded renewable energy training equipment resources for CSI's renewable energy jobs training program include training equipment for alternative energy, solar/thermal, weatherization, and wind energy.
- **\$30,000 - Keep Smiling - Meeting the Needs of the Underserved at the CSI Dental Clinic.** CSI received the \$30,000 grant from the Twin Falls Health Initiatives Trust for the Keep Smiling — Meeting the Needs of the Underserved at the CSI Dental Clinic project. The grant will upgrade the hardware and software of the CSI Dental Clinic in order to handle an increase in patients; provide oral health care education supplies to continue educating Twin Falls County's youth and the general public; expand to more schools, grades, and other venues; and provide financial assistance for a new class of 10 Dental Hygiene students.
- **\$16,028 - Scholarships for Disadvantaged Nursing Students.** CSI received a \$16,028 grant to provide scholarships to Associate Degree Nursing students from the U.S. Dept. of Health and Human Services' Health Resources and Services Administration. The Scholarships for Disadvantaged Students grant will provide scholarships to 11 full-time RN students, who qualified as economically, environmentally, or educationally disadvantaged.

#### Economic Development – Chobani

CSI has a history of acting as a focal point for the attraction of new businesses to the region. What may separate CSI from other colleges and universities is that we aren't just involved after the company decides to come to our service region, but we are also quite engaged in recruiting those businesses. That is why local economic development professionals like Jan Rogers refer to the College as their "secret weapon." Economic development is a powerful contributor to a vibrant local economy. Anything that is good for the regional and Idaho economy is good for CSI, thus it makes sense for the College to actively participate. In Idaho, various agencies from the Governor's office, to Department of Commerce, Department of Labor, and our own local organizations like Twin Falls Urban Renewal Agency, Region IV Development, and Southern Idaho Economic Development Organization work in concert with CSI in recruiting efforts. Besides these agencies, we also work with the various city governments and their officials as we did with the "Chobani deal." We are well positioned with respect to these relationships, in large part due to the work of President Beck. An economic impact study performed by Dr. Cindy



## College of Southern Idaho

### Performance Measurement Report

Bond shows that “the arrival of Chobani is estimated to have a \$1.3 billion economic impact on this community, including the direct and indirect creation of thousands of jobs.”

#### CSI Foundation

Thanks to the continuing generosity of donors, the CSI Foundation was able to award scholarships in the amount of \$1.2 million for the 2011-2012 school year. Contributions for the year were well over \$2.5 million and the resource base for the Foundation continues to grow due to strong fiduciary management by the CSI Foundation Board of Directors and staff members. Gifts were received from individuals, private foundations, bequests, estates, and the CSI Employee Campaign.

### ***Part II – Performance Measures***

Performance Measure	2009	2010	2011	2012*	Benchmark
Retention Rate					
Full Time Students	55%	54%	57%	54%	CSI's retention rate will be at or above the median for its IPEDS peer group.
Part-Time Students	32%	37%	31%	34%	
Instructional Dollars per Student FTE	\$7,337	\$6,629	\$6,616	\$6,710	Maintain the cost of instruction per FTE at or below that of our peer institutions (defined as community colleges in Idaho).
- Academic	\$7,137	\$6,619	\$6,804	\$6,902	
- Professional Technical	\$8,194	\$6,670	\$5,857	\$5,906	
Tuition and fees					Maintain tuition and fees, both in-state and out-of-state, at or below that of our peer institutions (defined as community colleges in Idaho).
Full-Time	\$1,140	\$1,200	\$1,260	\$1,320	
Part-Time	\$95/credit	\$100/credit	\$105/credit	\$110/credit	
Graduation Rate	16%	18%	18%	17%	CSI's first-time full-time graduation rate will be at or above the median for its IPEDS peer group.
Transfer Rate	17%	14%	15%	15%	CSI's transfer-out rate will be at or above the median for its IPEDS peer group.
Employee Compensation Competitiveness	90.9%	92.2%	93.5%	94.1%	CSI employee salaries will be at the mean or above for comparable positions in the Mountain States Community College Survey. <sup>1</sup>
Total Yearly Dollar Amount Generated Through External Grants	\$4,082,786	\$6,058,548	\$4,066,363	\$3,495,405	Will submit a minimum of \$2,750,000 yearly in external grant requests with a 33% success rate.



## College of Southern Idaho

### Performance Measurement Report

<sup>1</sup> Each year a number of community colleges participate in the Mountain States Community College Survey. Information regarding full time employee salaries for reported positions is collected and listed in rank order. A mean and median range is determined for positions. In calculating this performance measure the College of Southern Idaho mean salary is divided by the Mountain States mean. The resulting percentage demonstrates how College of Southern Idaho salaries compare with other institutions in the Mountain States region.

#### For More Information Contact

**Dr. Edit Szanto**

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College of Southern Idaho

Performance Measurement Report

**Director Attestation for Performance Measurement Report**

In accordance with *Idaho Code* 67-1904, I certify the data provided in the Performance Measurement Report has been internally assessed for accuracy, and, to the best of my knowledge, is deemed to be accurate.

Department: College of Southern Idaho



Director's Signature

8.7-12

Date

Please return to:

Division of Financial Management  
Attn: Cheryl Richardson  
304 N. 8<sup>th</sup> Street, 3<sup>rd</sup> Floor  
Boise, Idaho 83720-0032

FAX: 334-2438  
E-mail: [cheryl.richardson@dfm.idaho.gov](mailto:cheryl.richardson@dfm.idaho.gov)



## College of Western Idaho

## Performance Measurement Report

### ***Part 1 – Agency Profile***

#### **Agency Overview**

College of Western Idaho (CWI) is Idaho's youngest community college enrolling their first students in 2009. CWI continues to experience steady growth, enrolling 8,077 students at the start of the 2011-2012 academic year (5,416 FTE) and 8,375 students spring semester 2012 (5,548 FTE). CWI strives to provide quality teaching and learning that's affordable and within reach, regardless of time and distance. CWI aspires to a straight "A" approach to education; affordable, accessible, adaptable, and accountable. The approach ensures opportunities for all to excel at learning for life.

CWI offers undergraduate, professional-technical, fast-track career training, adult basic education, and community education. With over 50 credit programs and hundreds of non-credit courses, students have an abundance of options when it comes to developing career skills or further study at a baccalaureate institution. CWI will prove to be an exceptional economic engine for western Idaho, serving the local business and industry training needs with customized training to garner an edge in today's competitive market.

CWI's service area is unique, and the area's characteristics have implications for the future of local higher education. CWI's service area includes Ada County, Adams County, Boise County, Canyon County, Gem County, Payette County, Valley County, Washington County, and portions of Elmore and Owyhee counties. The population of the College's service area is widely dispersed geographically and is projected to increase 16% in the next ten years. According to the U.S. Census Bureau, Idaho is predominately white making up 93.9% of the population, with the primary increases demographically between 2000 and 2010 being Black or African American at 79.8%, Native Hawaiian and other Pacific Islander at 77.1% and Hispanic of Latino at 73.0%. There will also be a 19% increase in the number of residents between ages 15 and 24, the traditional college-going years. Given these changes, there will be more jobs available than workers.

CWI adheres to Idaho Code Title 33 Education, Chapter 21 Junior (Community) Colleges. Policies of the Idaho State Board of Education that apply to CWI are limited as specified by Board Policy Section III, Subsection A.

#### **Core Functions/Idaho Code**

CWI is a two-year comprehensive community college as defined by Idaho Code 33, Chapters 21 and 22. The core functions of CWI are to provide instruction in: 1) academic courses and programs, 2) professional-technical courses and programs, 3) workforce training through short-term courses and contract training for business and industry, and 4) non-credit, special interest courses.



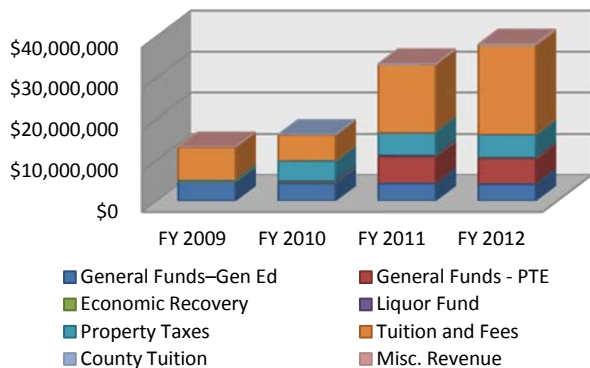
## College of Western Idaho

Performance Measurement Report

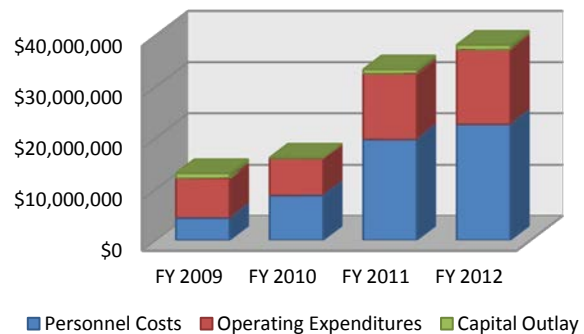
### Revenue and Expenditures

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
General Funds–Gen Ed	\$4,684,600	\$4,265,700	\$4,211,200	\$4,047,100
General Funds - PTE			\$6,583,700	\$6,289,712
Economic Recovery	\$0	\$277,500	\$78,000	\$0
Liquor Fund	\$199,300	\$197,500	\$200,000	\$200,000
Property Taxes	\$0	\$5,015,100	\$5,499,900	\$5,664,863
Tuition and Fees	\$8,236,000	\$6,382,100	\$16,600,000	\$21,792,400
County Tuition	\$0	\$30,000	\$100,000	\$95,000
Misc. Revenue	\$0	\$0	\$50,000	\$50,000
<b>Total</b>	<b>\$13,119,900</b>	<b>\$16,167,900</b>	<b>\$33,322,800</b>	<b>\$38,139,075</b>
Expenditure	FY 2009	FY 2010	FY 2011	FY 2012
Personnel Costs	\$4,339,200	\$8,754,500	\$19,727,098	\$22,578,332
Operating Expenditures	\$7,780,700	\$7,219,200	\$12,762,632	\$14,607,266
Capital Outlay	\$1,000,000	\$194,200	\$833,070	\$953,477
<b>Total</b>	<b>\$13,119,900</b>	<b>\$16,167,900</b>	<b>\$33,322,800</b>	<b>\$38,139,075</b>

**Revenue**



**Expenditures**





## College of Western Idaho

Performance Measurement Report

### Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
<b>Annual (unduplicated) Enrollment Headcount</b>				
Professional Technical	*	1,718	1,514	1419
Transfer	1,221	4,422	7,602	9677
<b>Annual Enrollment FTE</b>				
Professional Technical	*	835	807	784
Transfer	722	2,393	4,314	5269
<b>Degrees/Certificates Awarded</b>	*	199	527	647
<b>Dual Credit Headcount (unduplicated)</b>				
Total Annual Credit Hours	*	260	2,568	4227
Total Annual Student Headcount	*	98	408	734
<b>Tech Prep Headcount (unduplicated)</b>				
Total Annual Credit Hours	*	1,293	1,610	703
Total Annual Headcount	*	240	334	198
<b>Workforce Training Headcount (duplicated)</b>	**12,365 (duplicated)	9,623	8370	6778
<b>ABE/ASE/ESL (unduplicated)</b>	*	3,130	3,033	2687

\* No data.

\*\* Workforce Training and ABE/ESL were combined.

*FY 2009 – Summer 2008, Fall 2008, Spring 2009 (only Transfer offered first semester-Spring 2009)*

*FY 2010 and beyond – Summer, Fall, Spring*



## College of Western Idaho

### Performance Measurement Report

#### Performance Highlights:

- College of Western Idaho (CWI) Foundation raised \$6,071,967 to support CWI students and the College's extraordinary growth. In the fall of 2011 and spring of 2012, the CWI Foundation awarded 267 scholarships to CWI students totaling \$363,782, and 4 mini-grants of \$5,000 to CWI faculty to support innovative projects in the classroom.
- The Foundation completed a seven-month "Safe Investment" building campaign raising \$3.7M which is dedicated specifically to the Micron Center for Professional Technical Education building.
- CWI was granted Candidacy status for accreditation from the Northwest Commission on Colleges and Universities (NWCCU). This important milestone provided CWI the opportunity to move forward with the implementation of systems to support their students and meet the critical needs of their college such as federal grants, financial aid, and independent systems.
- CWI continued its partnership with the College of Southern Idaho (CSI) in order to meet standards for accreditation, and so CWI could offer college credit instruction, certificates and degrees, and federal financial aid while seeking accredited status with the Northwest Commission on Colleges and Universities (NWCCU).
- CWI was granted permission from the US Department of Education in Spring 2012 to move from CSI's enterprise resource planning system (Jenzabar) to their own (Ellucian Colleague). A team comprised of various departments worked tirelessly to implement the system within mere months of receiving the approval. CWI students can now complete all the steps necessary for becoming a student and paying for classes through CWI's in-house systems.
- CWI received approval in May 2012 from the US Dept of Education to participate in the Federal Student Aid Programs, independent of (CSI). Students now receive aid awards directly through CWI.
- In keeping with growing student demand, CWI added a new building to the Nampa Campus that houses nine professional-technical programs and several student service functions. The new Micron Center for Professional Technical Education opened this summer with nearly 180,000 square feet of space that is dedicated to servicing the entire community. The Micron Center will be home to Diesel Technologies, Automotive Technology, Auto Body, Powersports and Small Engine Repair Technology, Welding and Manufacturing, Machine Tool Technology, Electronics Technology and Drafting. The Business Partnership/Workforce Development unit will maximize the space by delivering certification and customized industry courses. The Center will also offer services for all CWI students with the One Stop, Assessment/Testing Center, Tutoring services and the college bookstore.
- CWI introduced eight new programs that will begin in the 2012-2013 academic year. They include Physical Therapy Assistant, Baking and Pastry Arts, and six secondary education concentrations.
- CWI's Dual Credit program contributed to the advanced learning opportunities available in the Treasure Valley by awarding 4,294 college credits to area high school students this past year. Looking ahead, the CWI Dual Credit program expects a significant increase in student participation during the 2012-2013 school year. One key predictor in this forecast is the surge in CWI Dual Credit instructors, from 47 last academic year to 109 approved to start Fall 2012.



## College of Western Idaho

### Performance Measurement Report

- NWCCU granted approval for six online degrees that will allow students to earn Associate of Arts degrees in Criminal Justice, English, Geography, History, Liberal Arts, and Political Science solely through online instruction. This fall CWI will start developing the programs and schedules that will make this new delivery effective for students.
- Nine brand new student clubs and organizations were formed at CWI bringing the total to 34. These groups not only enrich the student experience while at CWI, but they are a tremendous resource for the community. Last year these groups supported nearly 50 service projects and provided more than 1,000 hours of community service outreach, including educational workshops, fundraising for causes, volunteering for those in need, and issue awareness. Three of these student organizations – Speech and Debate, Business Professionals of America, and SkillsUSA – competed at the national level. Four students in the SkillsUSA team placed in the top ten in the country for their skills; nine students from CWI's Business Professionals group placed in the top 10, with three first place finishes on the national platform; and CWI's Speech and Debate Team claimed the national championship for community colleges, with six of the 27 students reaching the quarterfinal rounds.
- Adult Basic Education (ABE) and Business Partnerships/Workforce Development (BP/WD) collaborated and provided a bridge class in Multicultural Certified Nursing Assistant (MCNA), specifically for Boise refugees from Bhutan, Togo, Congo, Uzbekistan, Eritrea, Somalia and Iraq. This population faces tremendous obstacles, including language challenges, hindering their ability to successfully complete training and find employment. The Certified Nursing Assistant (CNA) bridge class involved a team-teaching approach between a CNA and an ABE/English as a Second Language (ESL) teacher, which included an in-depth analysis and contextualization of the textbook and adaptation of lesson plans with regard to specific language and cultural issues the students needed to understand and master.

- 14 students enrolled in MCNA/13 passed the class
- - To date, 6 have taken and passed the state exam

The combined efforts of CWI, local refugee resettlement agencies, and the Idaho Office for Refugees, coupled with the extensive effort on behalf of the students, have led to the success of this project.

- ABE recently unveiled a new concept called The Community Learning Center (CLC). CLC was created in order to respond to an emerging need in the community for adult literacy guidance. The aim of this service is to encourage adults to continue their education, whether it is learning to read or compute basic math, or demystify the GED test. This is a place where anyone is welcome to learn about ABE and everyone is treated with dignity and respect.
- Business Partnerships/Workforce Development (BP/WD) increased their custom and existing classes by expanding into CWI's service areas within the 10-county area. The Phlebotomy program is now offered in two more locations: Eagle and Fruitland. Nursing Assistant program expanded into McCall and Emmett; An Esthetician program was developed and began in Eagle, which included the opening of a skin care center. Over nineteen hundred students were served in the new Eagle location in the first year.



## College of Western Idaho

### Performance Measurement Report

- BP/WD improved on many program curriculums and delivery methods, making courses more accessible and flexible for students. Programs improved include the assistance with medications, in partnership with the Idaho State Divisions of Professional Technical Education; dental expanded functions for the Dental Assistant program; the Medical Assistant program began a redesign and will be delivered using a hybrid model (online/classroom), launching August 2012; the apprentice correspondence programs (Heating, Ventilation, and Air Conditions, Electrical and Plumbing) were converted to an online delivery model. This new model is in response to industry's need for a flexible schedule for the working apprentices.
- Several local businesses partnered with CWI for customized training
  - Agricultural Welding was taught to Simplot's employees
  - Over 100 inmates received training on Heavy Equipment as a result of a grant received from the Department of Corrections.
  - Partnering with the Department of Labor, CWI developed two custom courses for almost 160 displaced workers of XL Beef, focusing on workplace English and computer basics;
  - Partnered with Jackson's Food Stores to offer corporate and employee skills training on Microsoft Excel & Outlook.



# College of Western Idaho

## Performance Measurement Report

### Part II – Performance Measures

Performance Measure	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	Benchmark
<b>Goal # 1: Structure Student Success</b>						
Professional technical program completers are employed in a related field or have transferred to a 4-year college/university.	79%	93%				Achieve an 80% placement rate in each program.
General education (transfer) student success	*	100%				Students who transfer to colleges or universities as juniors will earn a 2.0 GPA or higher in their first semester at the transfer institution.
Community outreach student success	*	100%				70% of community outreach students will indicate satisfaction/completion of their goals for professional development as well as their employers' expectations using an end of course satisfaction survey.
Student/participant satisfaction rates	2.52	93%				End of course/event evaluation results will average 70% to demonstrate overall satisfaction.
Faculty qualification	100%	100%				All faculty will meet or exceed the CWI hiring standards.
<b>Goal # 2: Develop Systems to Support Faculty and Staff</b>						
Faculty and staff satisfaction <sup>1</sup>	55% (-20%)	61% (-14%)				75% of CWI's faculty and staff indicate satisfaction by responding with agree or strongly agree on the annual faculty/staff satisfaction survey.
<b>Goal #3: Implement Practices for Fiscal Stability</b>						
Instructional cost per credit hour and student FTE <sup>2</sup>	PTE \$6,726 Trans \$2,135	PTE \$6,058 Trans \$1,644				Instructional costs per credit hour and student FTE will compare favorably to those of peer institutions.
Total yearly dollar amount generated through external grants	100%	100%				Funding and/or meritorious evaluation for at least 5 relevant grant opportunities per year.
	100%	100%				Achieve \$1,000,000 yearly in external grant requests.
Funds raised through the CWI Foundation <sup>3,4</sup>	22%	53%				By 2013 achieve a minimum of 95% benefitted employee participation in the Foundation's internal campaign
	38.7%	100%				By 2013 award Foundation scholarships to at least a third of all eligible CWI students, including those with automatically renewing scholarships.
<b>Goal # 4: Connect the College to the Community</b>						
Participant survey of Community Education classes <sup>5</sup>	*	100%				Survey results will average 2.5 on a 4.0 point scale to indicate participant satisfaction with services offered.

See footnotes on next page

\*No data



## College of Western Idaho

Performance Measurement Report

### Footnotes

<sup>1</sup>**Faculty and staff satisfaction:** Performance measure is 14% below the target of 75% satisfaction level, although up 6% from 2011. Human Resources will conduct focus groups to engage employees in process improvement based on results from this survey.

<sup>2</sup>**Instructional cost per credit hour and student FTE:** The year-over-year cost decrease is driven by increased FTE's in FY2012.

### Funds raised through the CWI Foundation:

<sup>3</sup>*By 2013 award Foundation scholarships to at least a third of all eligible CWI students, including those with renewing scholarships:* For the purpose of this performance measure, CWI Foundation considers "eligible CWI students" to be any student who puts forth an effort to receive a scholarship. In total, the Foundation awarded 267 scholarships totaling \$363,782.

<sup>4</sup>*By 2013 achieve a minimum of 95% benefitted employee participation in the Foundation's internal campaign:* The 2012 Employee Giving Campaign is considered a huge success as participation doubled over last year, increasing from 22% to 53%. The third campaign is scheduled for a January 2013 kick-off.

<sup>5</sup>**Participant survey of Community Education classes:** A strategic decision was made to discontinue any duplicate services that were being offered by others in the Treasure Valley. This decision meant Business Partnership/Workforce Development would bring Community Education into its unit, and complete existing commitments before closing that part of community outreach. The survey results consist of evaluations from Kids College, the I-Dream Program and selected basic computer classes.

### For More Information Contact

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## ***Part 1 – Agency Profile***

### **Agency Overview**

Founded in 1933, North Idaho College is a comprehensive community college located on the beautiful shores of Lake Coeur d'Alene. NIC offers degrees and certificates in a wide spectrum of academic transfer, professional-technical, and general education programs.

NIC operates with an open-door admissions policy to meet the needs of individuals with divergent interests and abilities. NIC also plays a key role in economic development by preparing competent, trained employees for area businesses, industries, and governmental agencies.

NIC's five-county service area spans more than 7,000 square miles. The college serves this vast region through outreach centers in Bonners Ferry, Silver Valley, and Ponderay; as well as through the Workforce Training Center in Post Falls and various sites throughout the five northern counties through the Internet and an extensive network of interactive video classrooms.

As one of three community colleges in the state, North Idaho College works to provide a variety of career pathways for students from fast-paced, one-credit classes to certificates and transfer degrees. NIC works closely with the University of Idaho, Lewis-Clark State College, Idaho State University, and Boise State University to provide transfer options for students.

NIC offers a variety of student government and club opportunities for students with a wide range of interests and is known nationally for its competitive athletics programs. NIC is located amid the four-season beauty of North Idaho's world-famous recreation area. Outdoor activities include skiing, hiking, hunting, boating, fishing, backpacking, camping, swimming, and the ever-popular studying on the beach.

NIC's campus lies within the city limits of Coeur d'Alene, Idaho, a lakeside city with a growing population of around 44,000 residents. Metropolitan amenities are close by with Spokane, Washington, a city of over 208,000, just 30 minutes away and a Spokane-Coeur d'Alene metropolitan area of 609,000.

### **Core Functions/Idaho Code**

North Idaho College is a two-year community college as defined by Idaho Code 33, Chapter 21 and 22. The core functions of North Idaho College are to provide instruction in academic courses and programs and in professional technical courses and programs. As a part of professional technical education, the college also offer workforce training through short- term courses, contract training for business and industry, and non-credit, special interest courses.

As a second core function, the college confers the associate of arts degree and the associate of science degree for academic programs, and confers the associate of applied science degree and certificates for professional technical programs. Students obtaining an associate of arts or an associate of science degree can transfer with junior standing to all other Idaho public colleges and universities.



## North Idaho College

### Performance Measurement Report

#### Revenue and Expenditures

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
General Funds	\$10,743,200	\$9,292,700	\$10,893,900	\$8,742,900
Economic Recovery		\$632,000	\$429,600	\$177,600
Liquor Fund	\$198,100	\$197,600	\$200,000	\$200,000
Property Taxes	\$9,000,000	\$12,164,500	\$12,164,500	\$12,463,900
Tuition and Fees	\$8,248,700	\$10,164,700	\$9,778,100	\$10,579,300
County Tuition	\$740,000	\$735,800	\$735,800	\$735,800
Misc. Revenue	\$1,902,200	\$810,000	\$810,000	\$641,500
<b>Total</b>	<b>\$30,832,200</b>	<b>\$33,997,300</b>	<b>\$35,011,900</b>	<b>\$33,541,000</b>
Expenditures	FY 2009	FY 2010	FY 2011	FY 2012
Personnel Costs	\$23,217,70	\$24,307,30	\$22,919,100	\$23,497,000
Operating Expenditures	\$7,086,400	\$9,254,300	\$11,477,000	\$9,390,900
Capital Outlay	\$528,100	\$436,100	\$615,800	\$653,100
<b>Total</b>	<b>\$30,832,200</b>	<b>\$33,997,700</b>	<b>\$35,011,900</b>	<b>\$33,541,000</b>

#### Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
<sup>1</sup> Total Population Served	16,884	17,798	16,877	17,007
<sup>2</sup> Annual Unduplicated Enrollment Headcount				
- Professional Technical	742	843	989	1,184
- General Studies	5,661	6,768	7,615	7,798
- Adult Basic Education	1,400	1,481	1,211	1,041
- GED	809	811	764	680
- Workforce Training	8,272	7,895	6,298	6,304
<sup>3</sup> Total Population Served FTE		4,782	5,195	5,275
<sup>4</sup> Annual Enrollment FTE				
- Professional Technical	516	630	750	760
- General Studies	3,080	3,590	4,016	4,114
- Adult Basic Education		98	76	86
- GED		12	11	10
- Workforce Training		452	342	306
<sup>5</sup> Degrees/Certificates Awarded	583	646	795	1,050
Dual Credit				
- Total Annual Credit hours	6,637	7,522	8,142	9,187
- Total Annual Student Headcount	648	806	856	895
GED Credentials Awarded	584	561	527	457

<sup>1</sup>Based on Annual Unduplicated Enrollment Headcount (Professional Technical, General Studies, Adult Basic Education, GED, and Workforce Training).

<sup>2</sup>Methodology changed FY 2011. Professional Technical and General Studies annual unduplicated headcount is based on end-of-term counts, where prior years reflect 10<sup>th</sup> day.

<sup>3</sup>Based on Annual Enrollment FTE (Professional Technical, General Studies, Adult Basic Education, GED, and Workforce Training).



<sup>4</sup>Professional Technical and General Studies FTE is based on total credits for the year divided by 30; Adult Basic Education, GED, and Workforce Training FTE is based on 15 hours = 1 credit, 30 credits for the year = 1 FTE.

<sup>5</sup>Degrees/Certificates Awarded are based on awards reported to IPEDS, Completions Survey. FY 2011 number has been revised to reflect actual number reported to IPEDS, October 2011. FY 2012 number is based on awards as of July 23, 2012.

## Performance Highlights

### Education Corridor

After decades of dreaming, years of planning, and months of construction, officials celebrated the completion of the infrastructure on the site of the Education Corridor (on the north side of the NIC campus) with a ribbon cutting ceremony on Phase 1A in November 2011. Phase 1A included roadways, roundabouts, sidewalks, curbs, and a traffic signal that laid the groundwork for future expansion on the site by NIC and its partner organizations, Lewis-Clark State College, the University of Idaho, the city of Coeur d'Alene, and the Lake City Development Corporation. Phase 1B, which included the creation of an additional intersection, was completed in June 2012.

### Wrestlers Reading Program

The North Idaho College wrestling team distributed the 10,000<sup>th</sup> book to Sorenson Elementary first grade students in June 2012 through the Shirley Parker Reading Program, which was established in 2002 in partnership with Parker Toyota in honor of Doug Parker's late wife Shirley, who was a supporter of both wrestling and reading. The program puts a book in the hands of every first-grader in the Coeur d'Alene School District each year.

### Graduations

A record 1,000 students were eligible to graduate from NIC during the 2012 commencement ceremony in May 2012, and of those approximately 400 chose to walk across the stage to receive their degree or certificate. In addition, NIC celebrated several special graduation ceremonies, with its spring class of 10 Basic Patrol Academy graduates; pinning ceremonies for registered nursing, practical nursing, and radiography technology graduates; a special ceremony for 11 miners who were laid off from the Lucky Friday Mine and retrained to receive welding certifications; 18 graduates of the U.S. Environmental Protection Agency's 1012 Coeur d'Alene Basin Superfund Job Training Initiative; and multiple Adult Basic Education and GED completers.

### Faculty and Staff

Several outstanding North Idaho College staff and faculty members were honored with achievement awards during the annual NIC Employee Awards Breakfast in May 2012. In addition, Length of Service Awards were distributed to employees spanning 5 to 40 years of service to NIC. NIC Security Officer Kelly Hopkins became certified as a Rape Aggression Defense System Instructor, adding to her toolbelt in self-defense education. Yvette Wyatt, an employee of NIC's Head Start program, was voted a Soroptimist Woman of Distinction. The Communications and Marketing Department won several district awards through the National Council for Marketing and Public Relations. NIC Geology Instructor Bill Richards presented at the national Geological Society of America annual exposition in October 2011.

### Outreach Centers

The NIC Bonners Ferry Center celebrated its fifth anniversary in October 2011 with refreshments and an open house for students and the public at its Main Street location. In addition, North Idaho College signed a lease in May 2012 for NIC's Ponderay Center to relocate from the Bonner Mall in Ponderay to the Sandpoint Event Center in downtown Sandpoint. The Center expects to celebrate its grand opening in October 2012 and plans to be named NIC at Sandpoint.

### Brightest Star Award

North Idaho College was selected as a finalist for the 2011 Governor's Brightest Star Awards in the schools category for the state award that honors volunteerism.



### **Business Professionals of America**

Eight North Idaho College members of Business Professionals of America earned multiple national honors at the “Reach for New Heights” 2012 National Leadership Conference in April 2012. The teams and individuals placed among the top in the entire nation while competing against students from both two- and four-year schools. Those students and others won multiple awards at the state BPA competition as well.

### **Graphic Design**

In the past year, several Graphic Design students were winners of the prestigious Robideaux Scholarship, given by the American Advertising Federation of Spokane. Several students also won Addy Awards in video promotion, graphic design, and web design.

### **Collision Repair**

Students in North Idaho College’s Collision Repair Technology program took home silver and bronze medals from the annual Idaho Skills USA competition in April 2012. The students participated in hands-on collision repair techniques with other students from across the state.

### **Health Information Technology Grant**

In the fall of 2010, NIC received part of the \$19.2 billion allocated by the federal government to help the health care field utilize new technologies with the implementation of a new health information technology system. NIC was awarded a \$625,000 grant to train health information technology professionals and students that completed programs in Electronic Medical Records Adoption for Healthcare Practices (EMRA) and Electronic Medical Records—Information Technology Support (EMRITS) received post-secondary certificates. Grant funding ended in March 2012 as did the EMRA and EMRITS programs at NIC. Over the course of two years, NIC enrolled 327 students in the courses and of those, 80 percent completed certificates and more than 70 percent are now employed in the field.

### **Sentinel**

Several journalism students and staff members of the student newspaper The Sentinel earned various national honors in 2011-2012. NIC won six first-place Mark of Excellence Awards at the Society of Professional Journalists’ Region 10 conference in March 2011. The Sentinel won first place for “Best of Show” among two-year college newspapers at the 28<sup>th</sup> annual Associated Collegiate Press national convention also in March. The student newspaper earned its fourth consecutive Pacemaker Award from the Associated Collegiate Press/College Media Advisers in November 2011.

### **Esthetician**

NIC launched a new Esthetician course through the NIC Workforce Training Center in March 2011. Graduates of the 15-week course are eligible to apply for licensure to become skin care specialists, salon owners, and more.

### **Footsteps**

The Associated Students of North Idaho College hosted the interactive exhibit “Footsteps: A Journey of Many” in March 2012, presenting an opportunity for a five-sense exposure to issues of social injustice, such as human trafficking and sweatshops.



## North Idaho College

## Performance Measurement Report

### **Part II – Performance Measures**

<b>Performance Measure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>	<b>Benchmark</b>
<sup>1</sup> Remediation: Number of first-time freshman who graduate from an Idaho high school in the previous year requiring remedial education.	372 [Annual unduplicated enrollment headcount: 6,403]	318 [Annual unduplicated enrollment headcount: 7,611]	317 [Annual unduplicated enrollment headcount: 8,604]	377 [Annual unduplicated enrollment headcount: 8,982]	This measure is an input from the K-12 system and is not benchmarkable (per the Office of the Idaho State Board of Education)
<sup>2</sup> Retention Rates (Full-Time): Number of first-time full-time degree/certificate seeking students from fall who are still enrolled or completed their program as of the following fall (IPEDS)	Fall 2007 Cohort  462 (57%)	Fall 2008 Cohort  462 (55%)	Fall 2009 Cohort  474 (53%)	Fall 2010 Cohort  550 (59%)	Develop methods for identifying student intent as the first step in setting this particular benchmark
<sup>3</sup> Retention Rates (Part-Time): Number of first-time part-time degree/certificate seeking students from fall who are still enrolled or completed their program as of the following fall (IPEDS)	Fall 2007 Cohort  76 (35%)	Fall 2008 Cohort  92 (45%)	Fall 2009 Cohort  111 (38%)	Fall 2010 Cohort  105 (35%)	Develop methods for identifying student intent as the first step in setting this particular benchmark
<sup>4</sup> Number of NIC ABE and NIC GED students who enroll at NIC as post secondary students	133	157	236	227	Increase the number of NIC ABE and NIC GED students who enroll at NIC as postsecondary students by 10% each fiscal year

### **Performance Measure Explanatory Notes:**

<sup>1</sup> New in FY 2012, required by the Office of the Idaho State Board of Education. Source: SBOE Remediation Report. New methodology used starting in FY 2012.

<sup>2,3</sup> New in FY 2012, required by the Office of the Idaho State Board of Education. Source: IPEDS Fall Enrollment Survey.

<sup>4</sup> NIC Strategic Plan Theme/Goal 1: Student Success, Objective 3: Promote programs and services to enhance access and successful student transitions.

#### **For More Information Contact**

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## University of Idaho

### Performance Measurement Report

#### **Part 1 – Agency Profile**

##### **Agency Overview**

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.

As designated by the Carnegie Foundation, 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 medical and veterinary medical education programs in which the state of Idaho participates; WWAMI – Washington-Wyoming-Montana-Alaska-Idaho for medical education; WI – Washington-Idaho for veterinary medical education.

primary and continuing emphasis in agriculture, natural resources and metallurgy, engineering, architecture, Law, foreign languages, teacher preparation and international programs, business, education, liberal arts, physical, life and social sciences. Some of which also provide the core curriculum or general education portion of the curriculum.

The institution serves students, business and industry, the professional 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.

##### **Core Functions/Idaho Code**

Recognizing that education was vital to the development of Idaho, the legislature set as a major objective the establishment of an institution that would offer to all the people of the territory, on equal terms, higher education that would excel not only in the arts, letters, and sciences, but also in the agricultural and mechanic arts. The federal government's extensive land grants, particularly under the Morrill Act of 1862, provided substantial assistance in this undertaking. Subsequent federal legislation provided further for the teaching function of the institution and for programs of research and extension. In all, approximately 240,000 acres were allocated to the support of Idaho's land-grant institution.

After selecting Moscow as the site for the new university, in part because Moscow was located in the "center of one of the richest and most populous agricultural sections in the entire Northwest" and the surrounding area was not subject to the "vicissitudes of booms, excitement, or speculation," the University of Idaho was founded January 30, 1889, by an act of the 15<sup>th</sup> and last territorial legislature. That act, commonly known as the university's' charter, became a part of Idaho's organic law by virtue of its confirmation under article IX, section 10, of the state constitution when Idaho was admitted to the union. As the constitution of 1890 provides, "The location of the University of Idaho, as established by existing laws, is hereby confirmed. All the rights, immunities, franchises, and endowments heretofore granted thereto by the territory of Idaho are hereby perpetuated unto the said university. The regents shall have the general supervision of the university and the control and direction of all the funds of, and appropriations to, the university, under such regulations as may be prescribed by law." Under these provisions, the University of Idaho was given status as a constitutional entity.



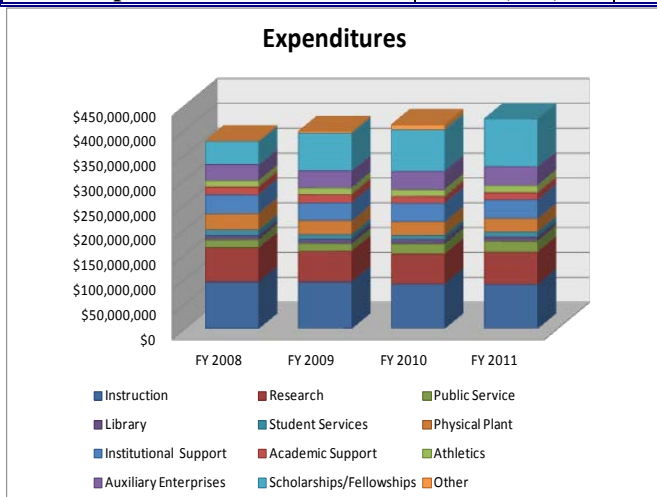
# University of Idaho

## Performance Measurement Report

### University of Idaho

#### Revenue and Expenditures<sup>1</sup>:

Revenue	FY 2009	FY 2010	FY 2011	FY 2012 – UNAUDITED - DRAFT ONLY
Approp: General Funds	\$127,767,588	\$107,249,600	\$103,804,200	\$100,824,500
Approp: Federal Stimulus	\$0	\$5,329,056	\$1,454,304	\$367,641
Approp: Endowment Funds	\$5,307,300	\$6,164,400	\$6,164,400	\$6,164,400
Approp: Student Fees	\$42,415,462	\$47,923,505	\$58,158,895	\$65,528,071
Institutional Student Fees	\$18,287,276	\$17,174,451	\$20,467,224	\$22,145,186
Federal Grants & Contracts	\$70,803,285	\$75,913,834	\$92,730,000	\$92,559,162
State Grants & Contracts	\$5,502,914	\$5,051,659	\$4,748,152	\$5,288,429
Private Gifts, Grants & Contracts	\$4,457,023	\$4,500,246	\$4,947,987	\$3,941,421
Sales & Serv of Educ Act	\$10,643,423	\$10,130,640	\$9,791,049	\$10,312,317
Sales & Serv of Aux Ent	\$27,964,720	\$29,563,701	\$33,440,256	\$34,042,490
Indirect Costs/Other	\$14,102,236	\$42,368,253	\$40,568,173	\$31,146,364
<b>Total Revenues</b>	<b>\$327,251,227</b>	<b>\$351,369,345</b>	<b>\$376,274,640</b>	<b>\$372,319,981</b>
Expenditure	FY 2009	FY 2010	FY 2011	FY 2012 – UNAUDITED - DRAFT ONLY
Instruction	\$89,740,419	\$89,235,643	\$86,639,313	\$91,407,333
Research	\$62,398,685	\$67,917,142	\$75,413,369	\$75,445,877
Public Service	\$30,115,591	\$30,531,632	\$31,133,657	\$28,509,072
Library	\$4,077,428	\$4,000,300	\$4,093,600	\$4,472,719
Student Services	\$9,817,771	\$10,368,449	\$11,798,205	\$12,567,304
Physical Plant	\$42,698,364	\$45,429,993	\$45,018,045	\$48,388,647
Institutional Support	\$31,634,173	\$30,114,735	\$27,590,583	\$30,840,441
Academic Support	\$12,987,572	\$12,241,169	\$11,594,229	\$12,535,874
Athletics	\$9,067,319	\$9,339,948	\$11,003,975	\$12,198,103
Auxiliary Enterprises	\$25,220,653	\$26,673,577	\$27,774,298	\$28,054,629
Scholarships/Fellowships	\$22,528,678	\$18,030,738	\$22,147,964	\$21,010,715
Other	\$0	\$0	\$0	\$0
<b>Total Expenditure</b>	<b>\$340,286,653</b>	<b>\$343,883,326</b>	<b>\$354,207,238</b>	<b>\$365,430,714</b>



<sup>1</sup>The amounts that are now in this report conform to our audited financial statements, which was not the case in previous reports.



**Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Annual (unduplicated) Enrollment Headcount <sup>1</sup>				
- Undergraduate	10,955	11,250	11,133	11,478
- Graduate	4,955	4,891	4,668	4,489
- <u>Professional</u>	<u>332</u>	<u>347</u>	<u>372</u>	<u>382</u>
Total	16,242	16,488	16,173	16,349
Annual Credit Hours Taught <sup>2</sup>				
- Undergraduate	273,488	278,398	288,625	292,540
- Graduate	35,013	36,376	37,698	35,859
- <u>Professional</u>	<u>10,796</u>	<u>11,413</u>	<u>10,891</u>	<u>12,633</u>
Total	319,297	326,187	337,214	341,032
Annual Enrollment FTE <sup>2</sup>				
- Undergraduate	9,116	9,280	9,621	9,751
- Graduate	1,459	1,516	1,571	1,494
- <u>Professional</u>	<u>369</u>	<u>388</u>	<u>389</u>	<u>434</u>
Total	10,945	11,184	11,581	11,679
Degrees Awarded <sup>3</sup>				
- Undergraduate	1,673	1,644	1,688	1,761
- Graduate	644	612	679	728
- <u>Professional</u>	<u>96</u>	<u>95</u>	<u>102</u>	<u>103</u>
Total	2,413	2,351	2,469	2,592
Dual Credit hours taught <sup>4</sup>				
- Total Annual Credit Hours	1,809	1,806	1,709	2,923
- Total Annual Student Headcount	547	538	514	778
Remediation <sup>5</sup>				
- Percent of New Frosh from Idaho who need remediation in English/Reading	11%	9%	11%	14%

<sup>1</sup> Summer, Fall and Spring, as reported to IPEDS.

<sup>2</sup> Based on SBOE PSR-1.5. FTE = Annual Credits divided by 30 for Undergraduate, 24 for Graduate, 28 for Law. WWAMI is student headcount.

<sup>3</sup> From UI Data Warehouse tables. Degrees Awarded counts here do not include Academic Certificates.

<sup>4</sup> UI Dual Credit Hours for this and previous years have been carefully reviewed to insure only those postsecondary credits are counted which were also counted for credits at the high school level.

<sup>5</sup> From UI Remediation report to SBOE (UI does not offer remedial Math).

***Performance Highlights:***

1. **High 80% 1<sup>st</sup> year retention rate for new frosh**, which is the highest in the state.
2. **Nearly \$100 million in funding from competitive externally funded grants and contracts.**  
This represents more than \$165,000 per full-time faculty engaged in instruction and research.
3. **High percentage of undergraduate degrees awarded in STEM fields**, 31% in FY2012, highest in the state and slightly higher than the peer median of 30%. STEM=Science, Technology, Engineering & Math – according the Complete College America taxonomy.



# University of Idaho

## Performance Measurement Report

### Part II – Performance Measures

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	Benchmarks
<u>UI Goal 1, Objective B</u> First-year Retention Rate <sup>1</sup> Full-time: UI Rate Peer Median UI Rank	77% 81% 12 / 17	77% 83% 12 / 17	81% 83% 11 / 17	80% Peer data available Fall 2012 23%	<i>SBOE: 70%</i>  <i>UI: 83%</i> <i>Peer Median</i>
Part-time New Frosh UI Rate	41%	33%	44%		
<u>UI Goal 1, Objective B</u> Six-Year Graduation Rate <sup>1</sup> UI Rate Peer Median UI Rank	57% 62% 12 / 17	56% 63% 12 / 17	55% 62% 13 / 17	51% Peer data available Fall 2012	<i>62%</i> <i>Peer Median</i>
<u>UI Goal 2, Objective A:</u> Grant applications supporting/requiring interdisciplinary activities <sup>2</sup> - Number - Percent	114 10%	185 20%	164 18%	395 39%	<i>20%</i>
<u>UI Goal 2, Objective A</u> Expenditures from competitive grants & contracts <sup>3</sup> per full-time instruction and research faculty <sup>1</sup>	\$88,242,000 / 650 = \$135,757	\$87,207,000 / 632 = \$145,570	\$96,229,000 / 581 = \$165,627	\$ Available Winter 2012 / 635 =	<i>\$150,000</i>
<u>UI Goal 2, Objective B</u> Percent of undergraduate students participating in research programs <sup>4</sup> STEM Non-STEM Total	20% 36% 56%	21% 37% 58%	20% 49% 69%	23% 46% 70%	<i>20%</i> <i>40%</i> <i>60%</i>
<u>UI Goal 2, Objective B</u> Number and Percent of UG degrees conferred in STEM fields <sup>1</sup> UI Number / Percent Peer Median Percent UI Rank	589 / 36% 32% 6 / 17	561 / 34% 32% 7 / 17	560 / 33% 30% 8 / 17	570 / 31% Peer data available Spring 2013	<i>32%</i> <i>Peer Median</i>
<u>UI Goal 3, Objective B</u> Percent of undergraduate students participating in service learning opportunities <sup>5</sup> Number Percent	1,933 20%	2,581 28%	3,243 34%	2,887 30%	<i>33%</i>
<u>UI Goal 4, Objective A</u> Percent disadvantaged minority - full-time faculty <sup>1</sup> - full-time staff <sup>1</sup> - full-time students <sup>6</sup>	2.9% 3.4% 8.0%	2.5% 3.5% 8.7%	3.2% 4.7% 10.7%	3.9% 4.7% 9.3%	<i>Faculty: 5.0%</i> <i>Staff: 6.8%</i> <i>Students: 13.3%</i>



## University of Idaho

## Performance Measurement Report

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	Benchmarks
<b>UI Goal 4: Objective B</b> Survey data support a positive experience with culture and climate <b>Students</b> –Satisfied with overall experience <sup>4</sup> <b>Faculty</b> –Satisfied with job overall <sup>7</sup> <b>Staff</b> –Are treated with consideration and respect <sup>8</sup>	97%	96%	97%	Available Fall 2012	97%
	Not Surveyed	Not Surveyed	60%	Not Surveyed	74% <i>Public Universities</i>
	88%	Not Surveyed	Not Surveyed	Available Spring 2013	90%
<b>UI Goal 4, Objective C</b> Institution primary reserve ratio comparable to the advisable level of reserves <sup>9</sup>	31%	26%	25%	Available Fall 2012	40%

### Performance Measure Explanatory Notes:

<sup>1</sup> As reported to IPEDS; Peer data from IPEDS Peer Comparison system (STEM fields using CCA definitions). Each year's rates reflect the percent returning in or graduating prior to the fall of the FY specified. Thus, FY 2012 shows the percent of students returning in fall of 2011-12 from the previous year, while the six-year graduation rate shows the percent of the 2005-06 new frosh cohort graduating prior to the fall of 2011-12.

<sup>2</sup> From UI Office of Sponsored Programs; Interdisciplinary award dollar tracking system still under development.

<sup>3</sup> As reported to NSF annually by the UI Office of Research and Economic Development.

<sup>4</sup> From the UI web-based, Graduating Senior Survey – percent of responding graduates.

<sup>5</sup> As reported by UI Career Center/Service Learning Center, divided by Common Data Set fall undergraduate HC.

<sup>6</sup> Fall 10<sup>th</sup> Day, US Citizen and Permanent Resident students who indicated Hispanic, Black or Native American.

<sup>7</sup> From UCLA/HERI National Faculty Survey, which is conducted every third year.

<sup>8</sup> From UI Staff Survey, which is conducted every third year.

<sup>9</sup> As reported by UI Business and Accounting Services, Benchmark based on NACUBO recommendations.

#### For More Information Contact:

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## Boise State University

### Performance Measurement Report

#### ***Part 1 – Agency Profile***

##### **Agency Overview**

Boise State University is a public, metropolitan research university offering an array of undergraduate and graduate degrees and experiences that foster student success, lifelong learning, community engagement, innovation and creativity. Research and creative activity advance new knowledge and benefit students, the community, the state and the nation. As an integral part of its metropolitan environment the university is engaged in professional and continuing education programming, policy issues, and promoting the region's economic vitality and cultural enrichment.

Boise State University employs over 3,000 full and part-time employees, including approximately 1,300 full-time professional and classified staff and more than 600 full-time faculty members. The main campus of Boise State University is located at 1910 University Drive Boise Idaho. Classes are also provided at Gowen Field Air Base, Mountain Home Air Force Base, Twin Falls (CSI campus), Coeur d'Alene (Lewis-Clark State College), Lewiston (Lewis-Clark State College), Micron Technology, Boise State Center on Main (Alaska Building) and Boise State University Meridian Center. In addition, Boise State University provides a growing number of online courses and programs that are available across the state and nation.

Boise State University offers studies in nearly 200 fields of interest with more than 70 master's and seven doctoral programs offered through seven colleges: College of Arts and Sciences, College of Engineering, College of Social Sciences & Public Affairs, College of Education, College of Health Sciences, College of Business and Economics, and the Graduate College.

Boise State University is governed by the Idaho State Board of Education which is statutorily designated as the Board of Trustees for the institution. Dr. Robert Kustra has served as President since 2003.

##### **Core Functions/Idaho Code**

Boise State University is created by Idaho Code Title 33, Chapter 40. Idaho Code 33-4001 provides the primary function of Boise State University to be that of "an institution of higher education" and "for the purposes of giving instruction in college courses..." In addition, it provides the "standards of the courses and departments maintained in said university shall be at least equal to, or on a parity with those maintained in other similar colleges and universities in Idaho and other states," and that the "courses offered and degrees granted at said university shall be determined by the board of trustees."



**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS  
OCTOBER 17, 2012**

## Boise State University

## Performance Measurement Report

### Revenue and Expenditures:

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
Approp: General Funds	\$89,148,183	\$78,352,400	\$70,116,300	\$67,101,400
Approp: Federal Stimulus	\$0	\$4,856,400	\$1,381,100	
Approp: Endowment Funds	\$0	\$0	\$0	\$530,400
Approp: Student Fees	\$50,661,117	\$55,165,000	\$61,818,400	\$70,126,300
Institutional Student Fees	\$30,380,097	\$29,373,721	\$24,094,812	\$27,302,419
Federal Grants & Contracts	\$84,068,486	\$89,641,739	\$91,434,574	\$114,526,277
State Grants & Contracts	\$3,246,324	\$2,840,328	\$2,897,135	\$3,379,468
Private Gifts, Grants & Contracts	\$13,309,333	\$22,489,477	\$17,621,575	\$17,222,042
Sales & Serv of Educ Act	\$0	\$0	\$0	\$1,117,122
Sales & Serv of Aux Ent	\$56,966,521	\$49,268,011	\$47,671,784	\$53,053,482
Indirect Costs/Other	\$18,679,149	\$18,356,568	\$12,801,879	\$20,470,917
<b>Total Revenues</b>	<b>\$346,459,210</b>	<b>\$350,343,644</b>	<b>\$329,837,559</b>	<b>\$374,829,827</b>
Expenditure	FY 2009	FY 2010	FY 2011	FY 2012
Instruction	\$87,423,171	\$86,989,423	\$90,631,721	\$92,024,606
Research	\$17,891,374	\$18,088,831	\$15,026,939	\$19,967,082
Public Service	\$12,594,255	\$12,051,052	\$12,396,695	\$11,803,939
Library	\$7,407,503	\$7,160,147	\$6,997,873	\$6,902,947
Student Services	\$10,269,955	\$13,195,914	\$11,941,830	\$12,117,207
Physical Plant	\$17,037,209	\$18,189,410	\$15,081,111	\$15,398,849
Institutional Support	\$30,496,067	\$33,745,968	\$26,710,970	\$28,989,836
Academic Support	\$18,854,391	\$22,050,035	\$15,686,466	\$18,826,838
Athletics	\$25,584,503	\$26,312,240	\$32,806,108	\$2,214,700
Auxiliary Enterprises	\$42,378,593	\$38,904,476	\$33,068,047	\$65,628,987
Scholarships/Fellowships	\$68,285,664	\$72,646,006	\$71,650,735	\$100,781,335
Other (planned use of one-time funds)	\$1,900,300	\$800,000	\$1,381,100	\$173,501
<b>Total Expenditure</b>	<b>\$340,122,985</b>	<b>\$350,133,502</b>	<b>\$333,379,595</b>	<b>\$374,829,827</b>



# Boise State University

## Performance Measurement Report

### Part I: Profile of Cases Managed and/or Key Services Provided

	FY 2009	FY 2010	FY 2011	FY 2012
<b>1. Enrollments:</b>	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12
Fall Enrollment on 10 <sup>th</sup> Day Census				
--Total	19,667	18,936	19,993	19,664
--Professional Technical	1,157	0	0	0
--Undergraduate	16,417	16,696	17,349	17,368
--Graduate	2,093	2,240	2,644	2,296
Annual Enrollment Total Headcount (End of Term headcounts; unduplicated count of students attending Su, Fa, and/or Spr)	27,596	27,622	29,443	28,565
--Professional Technical	1,764	0	0	0
--Undergraduate	20,992	21,560	22,521	22,776
--Graduate	5,003	6,127	6,989	5,829
<b>2. Student Credit Hours (SCH) Produced (see Part II for Cost per credit hour delivered)</b>	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12
Annual SCH Total (End of Term)	474,059	475,353	501,803	496,145
--Professional Technical	25,058	12	0	0
--Undergraduate	414,790	434,724	456,929	456,043
--Graduate	34,211	40,617	44,874	40,102
<b>3. Dual Enrollment<sup>1</sup> and Distance Education<sup>2</sup></b>	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12
Dual Enrollment Student Credit Hours – 12 month academic year	5,442	7,648	9,435	10,770
Dual Enrollment Distinct Students – 12 month academic year	1,217	1,602	2,030	2,410
Distance Education Student Credit Hours – 12 month academic year	40,258	47,491	52,590	55,571
Distance Education Distinct Students Enrolled – 12 month academic year	7,163	8,381	9,147	9,381
<b>4. Degrees and Certificates Awarded (see Part II for Number of Distinct Graduates)</b>	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12
Count of Awards Made <sup>3</sup>				
Professional Technical Degrees and Certificates	494	99	61	26
Associate Degrees (Academic)	292	287	195	197
Bachelor's Degree	2,093	2,181	2,573	2,787
Certificate - Graduate	66	85	121	170
Master's Degree	482	547	641	653
Doctorate Degree	9	8	11	11
Grand Total	3,438	3,207	3,602	3,844
<b>5. Sponsored Projects Proposals and Awards<sup>4</sup></b> (see Part II for Externally Funded Research Expenditures)	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12
Total # of Proposals Submitted	365	366	368	340
Total # of Awards	268	314	257	299
Total Federal Appropriation (Earmark) Funding	\$11,089,488	\$5,255,044	\$732,088	0
Total Recovery/Stimulus Funding	\$40,878	\$10,333,374	\$4,480,370	\$907,438
Remainder of Sponsored Projects Funding	\$25,942,157	\$34,471,530	\$30,762,184	\$35,120,876
Total Sponsored Projects Funding	\$37,072,523	\$50,059,948	\$35,974,642	\$36,028,314



# Boise State University

## Performance Measurement Report

### Part II – Performance Measures

Performance Measure					Performance Target ("Benchmark") by F2014 <sup>5</sup>
<b>Productivity Measures</b>					
1. Count of Distinct Graduates	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12	
Professional Technical Degrees and Certificates	497	94	59	26	
Associate Degree	292	286	195	197	
Bachelor's Degree	1,997	2,094	2,411	2,584	2,700
Certificate - Graduate	65	84	121	165	
Master's Degree	482	547	641	652	700
Doctorate Degree	9	8	11	11	21
Grand Total	3,238	3,054	3,355	3,496	
2. Externally Funded Research Expenditures	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12	
\$\$ of Expenditures	\$11,201,803	\$15,477,667	\$20,336,669	\$21,830,883	\$24,000,000
3. Count of distinct STEM and STEM Education graduates <sup>6</sup>	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12	
STEM Bachelor's Degree	215	235	272	309	
STEM Education Bachelor's Degree	17	10	24	22	
STEM Master's Degree	53	61	75	72	
STEM Doctorate Degree	3	3	3	4	
Grand Total	288	309	374	407	560
<b>Progress</b>					
5. Retention Rate	Fall 2008 <sup>7</sup> cohort	Fall 2009 cohort	Fall 2010 cohort	Fall 2011 cohort	
% of baccalaureate-seeking, full-time, first time students who return for class fall of sophomore year	66.4%	68.6%	69.1%	71% (estimate)	75%
6. Six-year Graduation Rate	Fall 2003 <sup>8</sup> cohort	Fall 2004 cohort	Fall 2005 cohort	Fall 2006 cohort	
% of baccalaureate-seeking, full-time, first time students who complete program within 6 years	26.3%	28.1%	29.2%	29.5% (estimate)	35%
7. Graduates per 100 student FTE enrolled* <sup>9</sup> (undergraduate-level/graduate-level)	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12	
	17.1 / 48.8	16.3 / 49.1	18.4 / 50.8	19.9 / 54.9	22.5 / 58.0
8. # of students requiring remedial coursework <sup>10</sup>	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12	
	415	293	108	123	100



# Boise State University

## Performance Measurement Report

Efficiency					
9. Cost per credit hour delivered <sup>11</sup> (not adjusted for CPI)	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12	
Successful (excludes F, W, I)	\$338.58	\$335.61	\$309.62	\$323.25	No change
All	\$278.61	\$275.07	\$251.95	\$265.15	No change
10. Degree completions (bachelors, masters, doctorate) per \$100,000 expense <sup>12</sup>	FY 2008-09	FY 2009-10	FY 2010-11	FY 2011-12	
Unadjusted for CPI	2.01	2.05	2.45	2.50	2.75
CPI adjusted (based on 2008 \$)	2.01	2.05	2.47	2.60	2.85

### Part III – Performance Highlights

- The number of distinct baccalaureate graduates in FY 2011-12 was 2,576, an increase of 29% from FY2008-09. This number of graduates is 18.7% higher than the number of graduates Boise State needs, according to the Office of the State Board, as its contribution to meeting the SBOE 60% goal.
- The cost per credit hour delivered for successfully completed courses has declined 4.5% over the 4 year period.
- The number of distinct students receiving STEM or STEM Education degrees increased 41.0% to 406 from FY 2008-09 to FY 2011-12.
- The number of distinct high school students enrolled in dual enrollment classes increased to 2,410 in FY 2011-12, a 98% increase from FY 2008-09. The number of credit hours for these students also increased 98% to 10,773 credit hours. This is equivalent to one semester of classes at 15 credits per semester for 718 students.
- Distance education enrollment increased to 9,381 students over this 4 year period, an increase of 30.9%.

#### For More Information Contact

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<sup>1</sup> Dual enrollment credits and students are measures of activity that occur over the entire year at multiple locations using various delivery methods. When providing measures of this activity, counts over the full year (instead of by term) provide the most complete picture of the number of unduplicated students that are enrolled and the number of credits earned.

<sup>2</sup> Distance Education is characterized by: the use of one or more technologies to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor, either synchronously or asynchronously. (Summarized from the language in the new Higher Education Opportunity Act.) Courses that are taught at a distance using educational technology are referred to as distance education (DE) classes.

<sup>3</sup> The count of awards made is greater than the number of graduating students because some graduating students receive multiple awards.



## Boise State University

## Performance Measurement Report

<sup>4</sup> "Sponsored Projects" refers to externally funded projects of all types (research, instructional, and public service) funded from all sources (federal, state, local, and private).

<sup>5</sup> Performance targets are targeted to be achieved in FY2014.

<sup>6</sup> Number of graduating students with a STEM degree. STEM definition used is from Complete College America, which includes the following degrees:

Baccalaureate STEM degrees: BS Applied Mathematics, BS Biology, BS Chemistry, BS/BEng Civil Engineering, Computer Science, Electrical and Computer Engineering, Geoarchaeology, Geophysics, Geoscience, Materials Science & Engr, Mathematics, Mechanical Engineering.

Baccalaureate STEM Education degrees: Biology, Chemistry, Mathematics, Earth Science and Physics

Master's STEM degrees: MA or MS in Biology, MS in Raptor Biology, MS in Chemistry, MS in Geology, MS in Hydrologic Sciences, MS in Geophysics, MS in Mathematics, MEng or MS in Civil Engineering, MEng or MS in Computer Engineering, MS in Computer Science, MEng or MS in Electrical Engineering, MS in Materials Science and Engineering, MEng or MS in Mechanical Engineering

Master's STEM Education degrees: MS STEM Education, MS in Mathematics Education

Doctoral STEM degrees: PhD Electrical and Computer Engineering, PhD Geology, PhD Geophysics, PhD in Geosciences.

<sup>7</sup> Retention for the Fall 2008 cohort is measured as the percent of the Fall 2008 cohort of first time, full-time baccalaureate-seeking freshmen that return to enroll in Fall of 2009.

<sup>8</sup> 6-year graduation rate of the Fall 2004 cohort is measured as the percent of the Fall 2004 cohort of first-time, full-time baccalaureate-seeking freshmen that graduated before the beginning of the fall 2010 semester..

<sup>9</sup> Number of baccalaureate degree recipients per 100 undergraduate FTEs enrolled and number of master's/doctoral degree recipients per 100 graduate level FTEs enrolled.

<sup>10</sup> Includes all new Idaho students who have been out of high school 1 year or less needing to complete remedial coursework.

<sup>11</sup> Based on the cost of Instruction, Library, Student Services and Academic Support for the years indicated.



## ***Part I – Agency Profile***

### **Agency Overview**

Idaho State University was recently classified as Research University-High by the Carnegie Foundation. ISU is one of only 99 institutions in the country in this prestigious group.

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.

ISU has six colleges: Arts and Letters, Business, Education, Pharmacy, Science and Engineering, and Technology. The Division of Health Sciences includes the College of Pharmacy, and the Kasiska School of Health Professions, School of Nursing, School of Rehabilitation and Communication Sciences, and Office of Medical and Oral Health. ISU's main campus and outreach centers are alive with the excitement of teaching, learning, creating and sharing of ideas. The jewel of southern Idaho—ISU's L.E. and Thelma E. Stephens Performing Arts Center—is a venue for local and international productions of the highest caliber. ISU, in its Board-assigned Mission, is the institution given the primary emphasis for education in the health professions and related biological and physical sciences. ISU has programs in thirty-six disciplines of the health professions. These high quality programs include postgraduate training in family medicine, dentistry, and pharmacy. Our faculty maintains mutually beneficial partnerships with health care institutions throughout the state. Researchers in ISU's Idaho Accelerator Center, in partnership with the Idaho National Laboratory and the Center for Advanced Energy Studies, collaborate on much-needed energy research.

### **Core Functions/Idaho Code**

ISU is a publicly-supported institution of higher education as created under the laws of the State of Idaho, Idaho Statute Title 33, chapter 30 and is governed by the State Board of Education.

As a public Doctoral High Research University, ISU meets the needs of a diverse population with certificate, associate, baccalaureate, master's and doctoral degree offerings, as well as postgraduate residency training. ISU's programs in the health professions, including pharmacy, reflect ISU's commitment to development of unique programs in the health professions, consistent with its assigned mission. 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. With the change in focus of the Idaho National Laboratory to nuclear science, ISU has expanded its nuclear science programming and continues its leadership in this area. 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. Within its College of Technology, ISU provides students high quality professional education and technical training in response to the needs of private industry.



# Idaho State University

## Performance Measurement Report

### Revenue and Expenditures <sup>1</sup>:

<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Approp: General Funds	\$87,622,446	\$78,598,679	\$70,977,925	\$68,913,825
Approp: Federal Stimulus	\$0	\$4,126,300	\$1,173,500	\$0
Approp: Endowment Funds	\$2,020,700	\$2,121,300	\$2,121,500	\$2,121,500
Approp: Student Fees	\$34,013,220	\$37,588,552	\$46,318,776	\$46,318,800
Institutional Student Fees	\$18,281,770	\$19,699,467	\$21,224,439	\$29,423,583
Federal Grants & Contracts	\$89,146,950	\$103,935,280	\$120,640,296	\$121,810,845
State Grants & Contracts	\$7,560,240	\$8,034,740	\$8,638,938	\$10,321,739
Private Gifts, Grants & Contracts	\$12,012,194	\$13,366,222	\$13,038,361	\$16,558,590
Sales & Serv of Educ Act	\$4,930,056	\$5,146,525	\$5,124,285	\$5,427,392
Sales & Serv of Aux Ent	\$22,222,614	\$20,371,796	\$20,904,227	\$21,275,772
Indirect Costs/Other	\$9,560,307	\$8,728,874	\$10,195,746	\$10,584,135
<b>Total Revenues</b>	<b>\$287,370,497</b>	<b>\$301,717,735</b>	<b>\$320,357,993</b>	<b>\$332,756,181</b>
<b>Expenditure</b>				
Instruction	\$92,765,539	\$89,304,998	\$89,060,654	\$92,732,030
Research	\$29,973,932	\$30,392,481	\$34,018,929	\$36,568,011
Public Service	\$4,826,166	\$3,851,861	\$3,180,603	\$5,166,057
Library	\$5,390,026	\$4,939,251	\$4,924,218	\$4,923,422
Student Services	\$8,455,009	\$7,804,741	\$7,563,755	\$7,592,089
Physical Plant	\$15,576,677	\$18,031,943	\$16,804,498	\$17,545,953
Institutional Support	\$18,575,992	\$18,432,015	\$22,035,515	\$22,336,175
Academic Support	\$13,319,827	\$12,668,776	\$12,764,214	\$13,196,267
Athletics	\$8,019,039	\$7,949,803	\$8,045,694	\$8,182,213
Auxiliary Enterprises	\$17,470,121	\$16,583,859	\$16,971,281	\$17,382,243
Scholarships/Fellowships	\$74,518,868	\$89,821,109	\$103,552,073	\$105,199,169
Other	\$0	\$2,534,237	\$1,425,765	\$2,110,678
<b>Total Expenditure</b>	<b>\$288,891,196</b>	<b>\$302,315,074</b>	<b>\$320,347,199</b>	<b>\$332,934,307</b>



# Idaho State University

## Performance Measurement Report

### Profile of Cases Managed and/or Key Services Provided

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Annual (unduplicated) Enrollment Headcount <sup>2</sup>				
- Professional Technical	1,434	1,736	1,876	1,960
- Undergraduate	12,996	13,760	13,572	14,205
- Graduate	3,795	3,601	3,192	3,119
(Does not include Tech Prep students) <b>Total:</b>	<b>18,225</b>	<b>19,097</b>	<b>18,640</b>	<b>19,284</b>
Annual Enrollment Full-Time Equivalency (FTE) <sup>3</sup>				
- Professional Technical	1,032	1,151	1,081	1,056
- Undergraduate	7,199	7,792	7,880	8,086
- Graduate	1,901	2,030	2,060	2,109
(Does not include Tech Prep students) <b>Total:</b>	<b>10,132</b>	<b>10,973</b>	<b>11,021</b>	<b>11,251</b>
Credit Hours Taught: <sup>4</sup>				
- <b>Total Credit Hours</b>	<b>292,542</b>	<b>317,005</b>	<b>318,263</b>	<b>324,889</b>
- Professional Technical Credit Hours	30,951	34,533	32,417	31,693
- Academic Credit Hours	<b>261,591</b>	<b>282,472</b>	<b>285,846</b>	<b>293,196</b>
- Undergraduate Hours	215,976	233,747	236,411	242,573
- Graduate Hours	45,615	48,725	49,435	50,623
(Does not include Tech Prep students)				
Degrees/Certificates Awarded <sup>5</sup>				
- Technical Certificates	195	179	204	192
- Associate	293	300	340	334
- Bachelor	1,043	1,095	1,064	1,117
- Master	375	438	404	480
- Doctorate	129	133	143	155
<b>Total:</b>	<b>2,035</b>	<b>2,145</b>	<b>2,155</b>	<b>2,278</b>
% awarded in Health Professions <sup>6</sup>	31%	31%	32%	33%
% awarded in STEM Disciplines <sup>7</sup>	13%	16%	19%	18%
Dual Credit Program <sup>8</sup>				
- Total Headcount (unduplicated)	1,436	1,588	1,434	1,669
- Total Credit Hours	8,311	9,306	8,644	10,453

### Cases Managed and/or Key Services Provided Explanatory Notes:

1. Data are from Idaho State University "Sources and Uses of Funds" budget reports.
2. Unduplicated headcount – a student is counted only once in a fiscal year based on the student's highest level in the FY. Tech Prep students are not included. Historically, Tech Prep students who were in high school and enrolled in Professional-Technical programs were counted in ISU's enrollment. Beginning in Fall 2010, Tech Prep students are not counted. Tech Prep data are removed for all years to aid in comparison.
3. Annual full-time equivalency (FTE) is calculated by dividing the total Undergraduate and Professional Technical credit hours (SCH) by 30; total Graduate SCH is divided by 24. Tech Prep students are not included in the data.
4. Credit hours generated by Tech Prep students are not included in the data.
5. Degrees are those awarded and posted as of July 22, 2011.
6. Certificates/Degrees with a U.S. Dept. of Education Classification of Instructional Programs (CIP) Code of 51 – Health Professions and Related Clinical Sciences, and Clinical Psychology degrees.
7. Certificates/Degrees with a CIP Code in Science, Technology, Engineering, and Mathematics (STEM) as defined by the Consortium for Student Retention Data Exchange (CSRDE).
8. Credit hours and headcount data are from the State Board of Education Dual Credit Report.



## Idaho State University

### Performance Measurement Report

#### Performance Highlights:

Among the events that took place in FY 2012 during the execution of ISU's Plan were the following:

- ✿ Learning and Discovery
  - New instrumentation - DNA sequencer and Confocal Microscope in Biomedical Science and Engineering
  - Developed in collaboration with Brigham Young University-Idaho, the College of Business introduced a Master of Accountancy. First year enrollment was 21 students, which exceeded enrollment estimates.
  - Energy Systems Technology & Education Center (ESTEC) received a \$100K grant to research Smart Grid SCADA systems from the US DOE funded Pacific Northwest Center of Excellence for Clean Energy.
- ✿ Access and Opportunity
  - ESTEC received a \$287K grant from the Department of Energy, Nuclear Energy University Program to establish a Nuclear Operations program. This program began in the fall of 2011. Currently several ESTEC Nuclear Operations students are participating in internships at INL.
  - In Idaho Falls, started a pilot project of 12 week courses in Math and English to improve retention
  - Increased course offerings in Idaho Falls, in both general education and selected upper division offerings
  - In FY 2012, the unduplicated student headcount was 19,284, an increase of 3.5% or 644 students from the prior fiscal year
  - Student credit hour production in FY 2012 increased 2.1%, or 6,626 credit hours from FY 2011
- ✿ Leadership in the Health Sciences
  - Karl Madaras-Kelly received \$365,166 NIH Grant to develop standards for measuring antibiotic use in hospitalized patients. The study is the largest of its kind to date and has the potential to improve care and decrease antibiotic-resistant infections in hospitals nationwide.
  - A \$500,000 grant was received from the Alsam Foundation to enhance the College of Pharmacy's research in Meridian.
  - Implemented Community Health Screenings (CHS) provided monthly by ISU-Meridian clinical programs, an inter-professional approach to serving vulnerable populations in cooperation with other government entities and area health care providers
  - Memorandum of Understanding with College of Idaho to cooperate on the expansion of our Physician Assistant program
  - Approval of the Ph.D. in Nursing
  - Memorandum of Understanding with BSU regarding nursing graduate education.
- ✿ Community Engagement and Impact
  - State-wide collaboration: CAES (with INL, UI, BSU)
  - Bengal Solutions is fueling economic development in Idaho. During the 2011-2012 Academic Year, 29 graduate students were involved in Bengal Solutions projects.
  - Accelerator center is teaming with International Isotopes, Inc., a manufacturer of nuclear medicine products, to produce rare cancer-fighting isotopes
  - Nearly 10,000 K-12 students were involved in the Idaho Museum of Natural History education programs/tours
- ✿ Stewardship of Institutional Resources
  - Successful re-financing of ISU's bonds, resulting in a net present value savings to the University of approximately \$3.2 million
  - New energy efficient windows were installed in the Museum building
  - On-going budget process continues to be refined to identify cost savings at the university



# Idaho State University

## Performance Measurement Report

### **Part II – Performance Measures**

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	Benchmark
Average undergraduate amount from grant or scholarship aid received, from the federal government, a state or local government, the institution, and other sources known by the institution <sup>1</sup>	\$4,336	\$4,793	\$4,830	\$5,121	\$5,200
Graduation Rates (Percent of full-time, first time students from the cohort of new first year students who complete their program within 1½ times the normal program length)	35%	34%	31%	29%	36%
Pass rates for required licensing & certification exams <sup>2</sup>					
Nursing (RN) –ISU pass rate	97%	91%	89%	96%	Meets or exceeds national averages
Nursing (RN) –National pass rate	87%	88%	87%	88%	
Pharmacy – ISU pass rate	100%	98%	100%	98%	
Pharmacy – National pass rate	97%	97%	95%	97%	
Physician Assistant – ISU pass rate	79%	96%	96%	97%	
Physician Assistant – National pass rate	89%	92%	94%	91%	
External funding (grants & contracts) awarded annually to ISU <sup>3</sup>	\$28,741,626	\$36,658,131	\$36,151,462	\$29,683,076	Increase by 2% per year
Average GPA of incoming full-time, first-year, degree-seeking freshmen <sup>4</sup>	3.25	3.14	3.17	3.26	≥3.40
Percent of 1 <sup>st</sup> time freshmen who graduated from an Idaho high school in the previous year requiring remediation <sup>5</sup>	not available	not available	34%	40%	30%
Retention rate of full-time and part-time freshmen returning for a second year <sup>6</sup>					
-Full-time	55%	56%	66%	61%	70%
-Part-time	37%	42%	48%	48%	55%

#### **Performance Measure Explanatory Notes:**

1. Data are from the IPEDS Financial Aid survey and represents the average amount of aid from grants or scholarships received from the federal government, state/local government, the institution, and other sources known to the institution.
2. Pass rates for Nursing, Pharmacy, and Physician Assistant programs are provided as examples; pass rates for graduates of all academic health professions programs consistently meet or exceed the national pass rates.
3. Totals are for sponsored programs (research) and do not include federal Pell grants to students. The FY 2012 amount is an estimate. The final FY 2012 total will not be completed until September. The dollar amount of proposals submitted in FY 2010 was \$120,945,964 and in FY 2011 \$108,319,417. In FY 2012 ISU submitted \$164,365,421 in proposals, which may result in a greater amount of funding in FY 2013.
4. Average high school grade point average of academic degree-seeking, first-time, full-time freshmen.
5. Data are from the SBOE Remediation Report. The data represent the percent of students whose test scores (ACT, SAT, COMPASS) place them in remedial Math and English courses. The benchmark is determined by the output of the high schools.
6. Data includes all degree-seeking freshmen enrolled in a fall semester that enroll in the subsequent fall semester, for example freshmen enrolled in Fall 2010 and enroll in Fall 2011.



Idaho State University

Performance Measurement Report

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## Lewis-Clark State College

## Performance Measurement Report

### Part 1 – Agency Profile

#### Agency Overview

Lewis-Clark State College (LCSC) was established by the Idaho State Legislature in 1893 as a regional Normal School dedicated to teacher training. Today, LCSC is one of Idaho's four public 4-year higher education institutions. LCSC's Carnegie classification is *Baccalaureate College—Diverse Fields*, with the "diverse" designation referring to the College's broad mix of undergraduate programs in the professions, arts, and sciences. The Carnegie classification of LCSC's size and setting is "small four-year, primarily non-residential."

LCSC's credit and non-credit programs fall within three primary mission areas: academic programs, professional-technical programs, and community programs. In addition to its traditional 4-year baccalaureate programs, the College has been assigned a collateral mission of providing community college programs within its five-county area of operations (Clearwater, Idaho, Latah, Lewis, and Nez Perce Counties) by its governing body, the State Board of Education. The College emphasizes undergraduate teaching and learning (with research playing a supporting role to teaching), application of learning, direct interaction among students and faculty (LCSC does not utilize teaching assistants), and a small-college/small-class environment that maximizes the opportunities for the success of LCSC's traditional and non-traditional students.

LCSC's main campus is located in Lewiston, ID. The College also delivers instructional programs at the LCSC Coeur d'Alene Center (in collaboration with its Northern Idaho Center for Higher Education [NICHE] partners: Boise State University, Idaho State University, North Idaho College, and the University of Idaho), and operates outreach centers in Grangeville and Orofino. LCSC's chief executive officer, President J. Anthony Fernández, after serving for a year as interim president, assumed his duties as the College's 15<sup>th</sup> president in March 2011. LCSC is accredited by the Northwest Commission on Colleges and Universities (NWCCU).

#### Core Functions/Idaho Code

The statutory basis for LCSC is located in the Idaho Code, Title 33 (Education), Chapter 31, which directs the College to offer instruction in *"four year college courses in science, arts, literature, and such courses or programs as are usually included in liberal arts colleges..."*, and further specifies that the board of trustees *"may also establish educational, professional-technical and other courses or programs of less than four years, as it may deem necessary, and such courses or programs that may be given or conducted on or off campus, or in night school, summer schools, or by extension courses."*

#### Mission:

***Lewis-Clark State College is a regional state college offering instruction in the liberal arts and sciences, professional areas tailored to the educational needs of Idaho, applied technical programs which support the local and state economy and other educational programs designed to meet the needs of Idahoans.***

#### Core Themes:

##### ***Core Theme One: Connecting Learning to Life Through Academic Programs***

***The first segment of the three part mission of Lewis-Clark State College is fulfilled under aegis of Academic Programs. This theme guides the offering of undergraduate instruction in the liberal arts and sciences and professional programs tailored to the educational needs of Idaho.***

##### ***Core Theme Two: Connecting Learning to Life Through Professional-Technical Programs.***

***The second segment of the three part mission of Lewis-Clark State College is fulfilled under the aegis of Professional-Technical Programs. LCSC functions under this theme by offering an array of credit and non-credit educational experiences that prepare skilled workers in established and emerging occupations that serve the region's employers.***

##### ***Core Theme Three: Connecting Learning to Life Through Community Programs.***

***The third and last theme of Lewis-Clark State College is fulfilled through Community Programs. The primary function of Community Programs is to provide quality delivery of outreach programs and services to students, customers and communities throughout Region II as well as degree completion programs in Region I.***



**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS  
OCTOBER 17, 2012**

## Lewis-Clark State College

## Performance Measurement Report

*LCSC's revenue comes from state appropriations; student tuition and fees; federal, state, and private grants and contracts; sales and services from educational and auxiliary services; and endowments and gifts. These revenues are allocated to instructional programs and support functions.*

### Revenues and Expenditures (includes Professional-Technical Education)

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
Approp: General Funds	\$19,254,067	\$17,466,667	\$15,662,278	\$15,105,778
Approp: General Funds-One-Time	\$1,020,367			
Approp: Endowment Funds	\$1,267,000	\$1,330,700	\$1,330,700	\$1,330,700
Approp: Student Fees	\$8,533,800	\$9,516,900	\$10,782,400	\$11,742,400
Approp: Federal Stimulus-One-Time		\$837,300	\$238,200	
Institutional Student Fees	\$5,016,000	\$5,002,200	\$5,140,600	\$5,377,700
Federal Grants & Contracts	\$6,000,000	\$6,500,000	\$7,700,000	\$8,200,000
State Grants & Contracts	\$2,400,000	\$3,000,000	\$3,000,000	\$3,000,000
Private Gifts, Grants & Contracts	\$1,900,000	\$1,600,000	\$1,800,000	\$2,000,000
Sales & Serv of Educ Act	\$1,500,000	\$1,300,000	\$1,200,000	\$1,300,000
Sales & Serv of Aux Ent	\$2,452,700	\$2,609,200	\$2,335,972	\$2,393,100
Indirect Costs/Other	\$1,050,000	\$700,000	\$800,000	\$728,400
<b>Total Revenues</b>	<b>\$50,393,934</b>	<b>\$49,862,967</b>	<b>\$49,990,150</b>	<b>\$51,178,078</b>
<b>Expenditures</b>				
Instruction	\$21,001,419	\$20,485,904	\$20,406,330	\$20,042,376
Research	\$336,461	\$198,600	\$169,097	\$192,270
Public Service	\$2,318,362	\$1,864,713	\$1,534,654	\$1,902,957
Library	\$1,035,219	\$1,063,412	\$1,051,475	\$1,050,537
Student Services	\$3,461,897	\$3,172,369	\$3,592,580	\$3,706,933
Physical Plant	\$3,323,155	\$3,034,043	\$2,981,637	\$2,884,770
Institutional Support	\$5,289,055	\$5,189,876	\$4,722,704	\$4,817,989
Academic Support	\$2,995,607	\$2,823,850	\$2,466,281	\$2,556,546
Athletics	\$2,337,000	\$2,231,800	\$2,305,000	\$2,303,100
Auxiliary Enterprises	\$2,919,355	\$2,904,700	\$2,809,150	\$2,819,400
Scholarships/Fellowships	\$4,150,200	\$5,243,600	\$6,757,400	\$8,000,000
One-Time	\$1,020,367	\$837,300	\$238,200	\$0
<b>Total Expenditures</b>	<b>\$50,188,097</b>	<b>\$49,050,167</b>	<b>\$49,034,508</b>	<b>\$50,276,878</b>



## Lewis-Clark State College

## Performance Measurement Report

### Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
Annual (unduplicated) Enrollment Headcount(EOT)	5,062	5,380	5,731	<b>6,106</b>
- Academic	3,584	3,732	3,789	<b>4,060</b>
- Professional-Technical	1,478	1,648	1,942	<b>2,046</b>
Annual Enrollment FTE	2,811	2,994	3,264	<b>3,292</b>
- Academic	2,334	2,496	2,711	<b>2,742</b>
- Professional-Technical	477	498	554	<b>550</b>
Annual Student Credit Hour Production	84,661	89,815	97,920	<b>98,746</b>
- Academic	70,356	74,878	81,317	<b>82,250</b>
- Professional-Technical	14,305	14,937	16,609	<b>16,496</b>
Credit Hours Taught per Faculty FTE	453	491	573	<b>501</b>
Degrees/Certificates Awarded	560	604	607	<b>773</b>
- Academic	398	450	445	<b>572</b>
- Professional-Technical	162	154	162	<b>201</b>
Pre-College				
- Annual Dual Credit hours	1,596	1,670	2,210	<b>2,657</b>
- Annual Tech Prep hours	3,146	3,464	3,893	<b>4,467</b>
- Annual Dual Credit Headcount	223	282	293	<b>460</b>
- Annual Tech Prep Headcount	858	959	1,195	<b>1,345</b>
Enrollment-Headcount (Fall End of Term)	4,054	4,303	4,681	<b>4,730</b>
Enrollment-Full Time Equivalent (Fall End of Term)	2,826	3,002	3,242	<b>3,297</b>
% of First-time Freshman Who Graduated From an Idaho High School in The Previous Year Requiring Remediation	57%	61%	57%	<b>48%</b>



## Lewis-Clark State College

### Performance Measurement Report

#### Performance Highlights:

Among the events that took place in FY2012 during the execution of LCSC's Plan were the following:

- The College saw its largest-ever enrollment in student headcount for both the Fall 2011 and Spring 2012 semester.
- LCSC produced a record graduating class, granting 773 degrees and certificates to 711 students at Spring Commencement.
- LCSC successfully submitted its one-year accreditation report to the Northwest Commission on Colleges and Universities.
- LCSC successfully converted its Enterprise Resource Planning (ERP) system from Unidata to SQL, after a College-wide effort spanning more than two years.
- For the second time in as many years, Lewis-Clark State College was selected for the President's Higher Education Community Service Honor Roll.
- Lewis-Clark State College received a \$1,366,316 grant from the Corporation for National and Community Service (CNCS), supporting 126 AmeriCorps positions throughout Idaho.
- An extensive remodel of the Fine Arts Building has begun. When complete, it will house the LCSC Business Division.
- The College implemented an integrated document imaging system for its financial operations, resulting in reduced paperwork, saved storage space, and improved inter-departmental coordination and oversight of financial transactions.
- LCSC worked in partnership with the City of Lewiston (receiving significant financial support through Community Block Development Grants) to remodel College facilities as part of the revitalization of downtown Lewiston. LCSC's Adult Learning Center is now housed in those facilities.
- In a joint effort involving LCSC natural scientists, community members, and the City of Lewiston forester, the College implemented an LCSC "Arboretum" project to map and identify all trees on its Normal Hill campus and establishing long-term plans for tree care and future plantings across the College.
- The College hosted a year-long series of lectures for community members, sponsored by the Nez Perce Historical Society, celebrating the history of the local area in conjunction with Lewiston's sesquicentennial (150-year) anniversary.
- Dr. Marika Botha, LCSC Professor of Kinesiology and Health, received the 2012 American Association for Health Education's College-University Health Education Specialist Award, considered the most prestigious honor a college or university health professor can earn.
- Dr. Lori Stinson, LCSC Chair of Nursing and Health Sciences, was named Outstanding Nurse Leader of 2012 by the Nurse Leaders of Idaho.
- Four Lewis-Clark State College Technical and Industrial Division students competed in the SkillsUSA National Leadership and Skills Conference in Kansas City this spring, after four of the five LCSC teams won gold medals at the state competition in Boise.



# Lewis-Clark State College

## Performance Measurement Report

### Part II – Performance Measures

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	Benchmark
Scholarship Dollars Per Student FTE <sup>1</sup> - Academic - Professional-Technical	\$1,819 1,229	\$1,868 1,338	\$1666 1,622	<b>\$1,808</b> <b>\$1,617</b>	<b>\$1,700</b>
Full-time Freshman Degree Seeking Retention Rate <sup>2</sup>	52%	50%	54%	<b>57%</b>	<b>60%</b>
Part-time Freshman Degree Seeking Retention Rate (with N)	36% (N=47)	33% (N=39)	44% (N=36)	<b>49% ( N=51)</b>	<b>See Note 3</b>
Full-time Non-degree Seeking Retention Rate (with N) <sup>4</sup>	50% (N=2)	10% (N=10)	38% (N=8)	<b>100% (N=4)</b>	<b>See Note 4</b>
Part-time Non-degree Seeking Retention Rate (with N)	34% (N=666)	32% (N=914)	34% (N=953)	<b>30% (N=1045)</b>	
Graduation Rates (Percent of full-time, first time students from the cohort of new first year students who complete their program within 1½ times the normal program length) <sup>5</sup>	27%	24%	28%	<b>31%</b>	<b>30%</b>
First-time Licensing/Certification Exam Pass Rates <sup>6</sup>	NCLEX-RN 90% (National Average= 86%) NCLEX-PN 67% <sup>7</sup> ARRT 100% <sup>8</sup> PRAXIS II 91%	NCLEX-RN 80% (National Average= 88%) NCLEX-PN 75% <sup>7</sup> ARRT 92% <sup>8</sup> PRAXIS II 88%	NCLEX-RN 95% (National Average= 89%) NCLEX-PN 100% <sup>7</sup> ARRT 92% <sup>8</sup> PRAXIS II 92%	<b>NCLEX-RN 89% (National Average=90%)</b> <b>NCLEX-PN 86% (National Average=85%)<sup>7</sup></b> <b>ARRT 100%<sup>8</sup> PRAXIS II 90%</b>	<b>NCLEX-RN: Meet or Exceed National Average</b> <b>NCLEX-PN: Meet or Exceed National Average</b> <b>ARRT: Meet or Exceed National Average</b> <b>PRAXIS II 90%</b>
Fall End of Term Duplicated Headcount for Students Enrolled in web, hybrid, and lecture/web enhanced courses <sup>9</sup>	5,031	6,878	7,431	<b>7,945</b>	<b>8,000</b>



## Lewis-Clark State College

### Performance Measurement Report

Percentage of LCSC graduates with positive placement <sup>10</sup>	97%	91%	91%	<b>92%</b>	<b>90%</b>
Number of GED certificates awarded by LCSC	495	489	514	<b>337<sup>11</sup></b>	<b>500</b>

#### Performance Measure Explanatory Notes:

1. In FY 2011, LCSC Foundation assets were adversely impacted by the economic downturn. In FY2012, however, the LCSC Foundation was able to increase scholarship levels more than \$30,000. Additionally, the J.A. and Kathryn Albertson Foundation Scholarship grant has provided funding for scholarships. Though increased funding of scholarships has benefitted LCSC students, the slow recovery from the economic downturn has also stimulated demand for LCSC's programs and scholarships. Starting in FY 2013, per State Board direction, academic and PT will be combined into a single metric "Scholarship dollars awarded per student FTE".
2. Increased efforts by Student Services yielded improved freshman retention rates. While last year's improvement in the retention rate was heartening, LCSC will strive for even greater retention. In FY 2012, LCSC initiated a comprehensive enrollment management plan, which included redoubled effort in intervening with students who are likely to drop out.
3. The number of students classified as first-time, first-year, and degree-seeking is relatively low and subject to significant percentage variations. Thus, LCSC will not establish a benchmark for this metric.
4. N/A. This metric (full-time, non-degree seeking student retention rate) is being included in College/University performance measures reports at the request of the State Board staff. At LCSC this population is extremely small or non-existent, with high variability from year-to-year. It is not feasible to draw valid statistical inferences on annual trends for this parameter nor to establish an actionable benchmark.
5. In FY 2012, LCSC saw an increase in the graduation rate due to increased efforts in improving scheduling, enhanced student advising, and streamlined graduation procedures.
6. Certification and licensing exam pass rates reflect first-time test takers only. All graduates must eventually pass the exams before practicing in their field.
7. The numbers of NCLEX-PN first-time test takers were: 2009-3; 2010-4; 2011-10; 2012-14.
8. The numbers of ARRT first-time test takers were: 2009-12; 2010-18; 2011-12; 2012-9.
9. Distance learning course enrollment has shown strong and steady growth, up 7% in FY2012.
10. This value reflects the percentage of LCSC graduates who are employed within six months of graduation, have entered the military, graduate school, on religious mission or voluntarily not in the labor market. While LCSC continues to produce well-prepared workers, the opportunity for employment is subject to the state of the economy, which is beyond LCSC's control.
11. Historically, the Idaho Department of Correction (IDC) has been a major source of LCSC's GED students. The dramatic decline in GEDs awarded during FY2012 is attributable to an increase in educational attainment by IDC inmates.

#### For More Information Contact

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## Idaho Public Television

## Performance Measurement Report

### Part 1 – Agency Profile

#### Agency Overview

Idaho Public Television (IdahoPTV) is an entity of the Idaho State Board of Education and holds in the public trust television and related broadcast telecommunication licenses issued and governed by the Federal Communications Commission (FCC). IdahoPTV is a statewide, non-commercial broadcast telecommunication system and new media provider with the network operations center located in Boise and additional staffed facilities in Moscow and Pocatello.

IdahoPTV's service to the region began in September of 1965 with KUID-TV, Moscow. Over the next 47 years, IdahoPTV has expanded its reach to include over-the-air broadcast television service to more than 98% of Idaho's population and portions of six adjoining states and Canada through an efficient system of five (5) digital transmitters and 44 repeaters (translators). IdahoPTV recently finished the installation of four (4) DTV fill-in repeaters that serve the areas of Glens Ferry, Emmett, Boise front/Harris Ranch and Bellevue. Installation of three (3) additional DTV fill-in repeaters to serve the areas of Idaho City, lower Valley County and eastern Pocatello is nearing completion. IdahoPTV's signals are rebroadcast under federal guidelines by cable and satellite systems in the region, as well as a rapidly expanding Internet-based content creation and distribution system. IdahoPTV's services and equipment have been made possible through diverse funding partnerships from individual contributions, grants from foundations and companies, and state and federal sources. We continue to work toward finishing the statewide conversion of all of IdahoPTV's facilities to digital.

IdahoPTV is a member in good standing of the Public Broadcasting Service (PBS) and is the only locally owned and operated network television station in Idaho.

IdahoPTV has benefited from the financial support of the Friends of Idaho Public Television, Inc., a component not-for-profit support organization. As directed by FCC guidelines, IdahoPTV's constituents are the people of Idaho, as well as those in portions of six surrounding states and Canada. Private donations provide more than 65% of our yearly operating budget, or \$4.5 million from over 20,000 individuals, foundations and companies in our rural service areas. State of Idaho support provides approximately 20% of our operating budget and is directed specifically toward the maintenance and administration of the statewide delivery system. The remaining 15% of our operating budget comes in the form of a yearly grant from the Corporation for Public Broadcasting, a private corporation funded by Congress. IdahoPTV's comprehensive audit is conducted annually by the Legislative Auditor, Legislative Services Office.

IdahoPTV has developed a reputation for producing award-winning quality television and other electronic media. IdahoPTV provides significant local public service to our viewers and users.

Outdoor Idaho continues to air on stations in Oregon and Washington. According to the Nielsen Survey Index, IdahoPTV enjoys some of the highest per capita viewership in the United States.

IdahoPTV produces a number of ongoing series, specials and services including:

*Outdoor Idaho*

*Dialogue* (weekly, live public affairs program)

*The Idaho Debates* (primary and statewide election coverage)

*Governor's State of the State Address/*

*Governor's State of the Budget Address* (live)

*Hymns of Thanksgiving*

*Scout* (online educational resources)

*Idaho Reports* (coverage of the Idaho Legislature)

*D4K Dialogue for Kids* (educational science program for grade school students)

*Idaho Legislature Live* (gavel-to-gavel live coverage of the Idaho House, Senate, JFAC and Redistricting Commission)

*Ron's Picks*

*The Buzz on IdahoPTV*

Also produced are other one-time programs including:

*Idaho Geology, A Convergence of Wonders*

*Salmon River Lodges & Legacies*

*Wooden Boats, Wondrous Lakes*

*The Color of Conscience*

*Idaho: An Aerial Tapestry*

*Capitol of Light: The People's House*

*Barbara Morgan: No Limits*

*Yellowstone's Cascade Corner*



## Idaho Public Television

## Performance Measurement Report

IdahoPTV's community outreach ranges from locally produced events and workshops to children's events, such as science workshops, program screenings and discussions, science camps, a literacy contest, educator workshops, and online educational resources.

The staff is led by Peter W. Morrill, General Manager; Ron Pisaneschi, Director of Content; Tim Tower, Director of Finance; Rich Van Genderen, Director of Technology; and Megan Griffin, Director of Marketing/Development.

### Core Functions/Idaho Code

Idaho Public Television is not referenced in Idaho Code. It was created by Legislative Intent within the budget process in 1982 and exists under the regulations of the Federal Communications Commission and the governance of the State Board of Education.

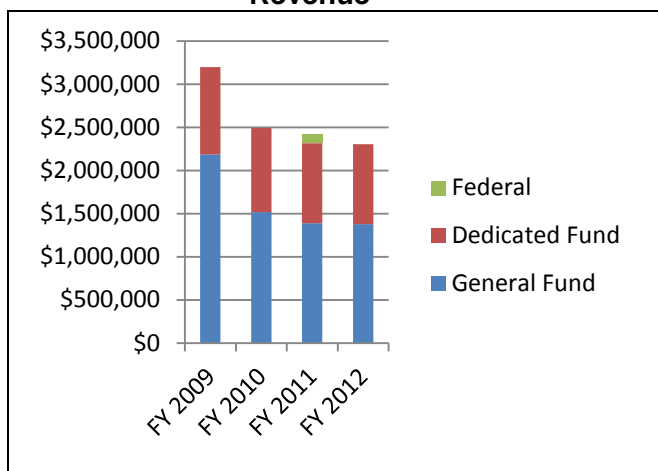
The mission of IdahoPTV is to meet the needs and reflect the interests of our various audiences. We do this by:

- 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.

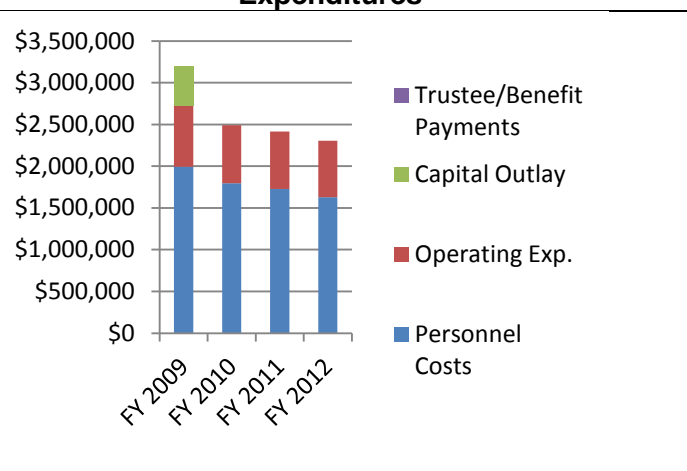
### Revenue and Expenditures

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
General Fund	\$2,187,700	\$1,518,800	\$1,390,500	\$1,377,000
Dedicated Fund	\$1,008,400	\$972,600	\$926,200	\$926,200
Federal	\$0	\$0	\$97,200	\$0
<b>Total</b>	<b>\$3,196,100</b>	<b>\$2,491,400</b>	<b>\$2,413,900</b>	<b>\$2,303,200</b>
Expenditure	FY 2009	FY 2010	FY 2011	FY 2012
Personnel Costs	\$1,993,700	\$1,794,200	\$1,728,200	\$1,627,200
Operating Exp.	\$731,600	\$697,200	\$685,700	\$676,000
Capital Outlay	\$470,800	\$0	\$0	\$0
Trustee/Benefit Payments	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$3,196,100</b>	<b>\$2,491,400</b>	<b>\$2,413,900</b>	<b>\$2,303,200</b>

**Revenue**



**Expenditures**





## Idaho Public Television

### Performance Measurement Report

#### Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
Channel Hours for Children (under the age of 12)	14,012	14,281	14,310	14,304
Channel Hours for Ethnic Minorities	5,242	5,153	5,206	5,327
Channel Hours for Learners	12,420	13,197	13,156	13,231
Number of Visitors to idahoptv.org*	3,581,741	1,228,364	1,561,834	1,252,548
Public Affairs Channel Hours	11,568	11,717	11,864	12,118
Hours of Originally Produced Content for Broadcast and/or Online	**	**	**	7,878

\*Software used to measure visitors to the idahoptv.org website for FY 2010 and FY 2011 was SurfStat and for FY 2012 was Google Analytics.

\*\*This is a new profile beginning FY 2012, which data has not previously been collected.

#### Performance Highlights:

During calendar year 2011 –

- 1,040 hours of overnight educational television, including 208 hours of professional development for teachers, as well as resources for K-12 classrooms.
- 260 kindergarten-third grade students contributed entries for the annual PBS Kids Go! Writers Contest.
- 23,644 e-mails sent to educators providing programming highlights and a link to monthly Classroom Calendar, connecting IdahoPTV on-air programs and Web-based resources to classroom curricula.
- 959 people in Boise, Pocatello and Caldwell attended the Community Cinema events to preview free screenings of *Independent Lens* films and *Women, War and Peace* followed by discussions of thought-provoking social issues featured in the films.
- 43 national and regional awards were received for programs that IdahoPTV produced, including two regional Emmy awards and five regional Emmy nominations.
- 158,844 page views on the *Idaho Reports* website during 105,124 visits.
- 350 hours of Students Come First meetings and 111 hours of Redistricting Commission meetings streamed online.

#### Part II – Performance Measures

Performance Measure	2009	2010	2011	2012	Benchmark
Number of awards for IdahoPTV media and services.	53	71	61	53	35
Number of DTV channel hours of transmission.	137,240	137,240	137,240	137,240	137,240
Number of transmitters broadcasting a DTV signal.	5	5	5	5	5 of 5
Number of DTV translators.	*	20 of 43	23 of 43	36 of 44	20 of 42
Number of licensed DTV fill-in translators (DTS).	0	1 of 7	1 of 7	1 of 7	3 of 7
Percentage of Idaho's population within our DTV signal coverage area.	73.1%	93%	96%	97.8%	73.1%



## Idaho Public Television

### Performance Measurement Report

Number of IdahoPTV channel hours of Idaho-specific educational and informational programming.	3,246	2,635	2,022	1,942	1,795
Total number of hours of educational programming.	17,921	23,113	23,958	27,535	8,842
Total FTE in content delivery and distribution.	16.06	20.14	18.57	20.26	<30.45
Successfully comply with FCC policies/PBS programming, underwriting and membership policies/and CPB guidelines.	Yes/Yes/Yes	Yes/Yes/Yes	Yes/Yes/Yes	Yes/Yes/Yes	Yes/Yes/Yes

#### Performance Measure Explanatory Notes:

\*This was a new performance measure in FY 2010, which data has not previously been collected.

#### For More Information Contact

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Boise, Idaho 83706  
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## Vocational Rehabilitation, Idaho Division of

Performance Measurement Report

### Part 1 – Agency Profile

#### Agency Overview

The Idaho Division of Vocational Rehabilitation (IDVR) is an agency under the oversight of the Office of the State Board of Education. Don Alveshere is the Administrator of the Division. IDVR is charged with several major responsibilities: Management of the State/Federal Vocational Rehabilitation Program, State Renal Disease Program, Extended Employment Services (EES) and the fiscal management of the Council for the Deaf and Hard of Hearing (CDHH). It should be noted that nationally, under the Federal Vocational Rehabilitation Program, each state has the ability to choose to have a combined or separate agency to serve the blind and visually impaired. In Idaho, a separate state agency (the Idaho Commission for the Blind and Visually Impaired) provides vocational rehabilitation services for those who have a primary disability of blind and visually impaired.

The Public Vocational Rehabilitation program is one of the oldest and most successful Federal/State programs in the United States. Vocational Rehabilitation serves individuals with severe disabilities that impose significant barriers to gainful employment. The average time needed for a person to complete a rehabilitation plan and become employed is twenty-two (22) months. In FFY 2011, employment of individuals with disabilities resulted in a 405% increase in client weekly earnings and significant decreases in the need for public support.

The structure of IDVR includes a Field Services unit as well as a Planning and Evaluation, Fiscal, Information Technology and Extended Employment Services units. Under the Field Services unit, there are eight (8) regional managers who supervise field staff in the following regions: Coeur d'Alene, Lewiston, Boise, Treasure Valley Special Programs, Twin Falls, Pocatello, Idaho Falls, and Caldwell.

IDVR is comprised of 150 employees, of which 145 are full time positions serving in thirty-seven (37) offices throughout the state. Offices are located throughout the state to include: Boise, Meridian, Coeur d'Alene, Sandpoint, Lewiston, Orofino, Moscow, Twin Falls, Burley, Pocatello, Blackfoot, Preston, Idaho Falls, Salmon, Rexburg, Caldwell, Nampa, and Payette. There is one (1) Central Office, eight (8) Regional Offices, ten (10) general Sub-Offices, seven (7) Mental Health Sub-Offices, nine (9) School – Work Sub-Offices, and two (2) Corrections Sub-Offices.

#### Core Functions/Idaho Code

**Legal Authority for the Idaho Division of Vocational Rehabilitation** is Idaho Code, 33-2301 and the Rehabilitation Act of 1973, as amended, 29 U.S.C. § 701, and is augmented by regulations promulgated and set forth at 34 CFR § 361.1.

Services that may be available include evaluation of rehabilitation potential, vocational guidance and counseling, physical and mental restoration, vocational, academic and other training, job placement and other services, which can reasonably be expected to benefit the individual in terms of employment.

The Division also manages state appropriated funds to assist individuals with chronic renal failure 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 customer's ability to pay, private insurance payments, and Medicare and Medicaid payments (Idaho Code, Title 33, Chapter 23, Vocational Rehabilitation 33-2307 – 33-2308).

The Extended Employment Services (EES) program provides funding to individuals with severe disabilities who are determined unable to maintain employment without on-going support. A state financial allotment is provided annually to be distributed by the EES Program Manager to contracted Community Rehabilitation Programs who subsequently provide the long term support to eligible customers (IDAPA 47.01.02 Rules and Minimum Standards Governing Extended Employment Services under the authority of Idaho Code 33-2303).

CDHH is an independent agency. This is a flow-through council for budgetary and administrative support purposes only with no direct programmatic implication for IDVR. The Council's vision is to ensure that individuals who are deaf, hard of hearing, or hearing impaired have a centralized location to obtain resources and information about services available (Idaho Code, Title 67, Chapter 73, Idaho State Council for the Deaf and Hard of Hearing 67-7301 – 67-7308).

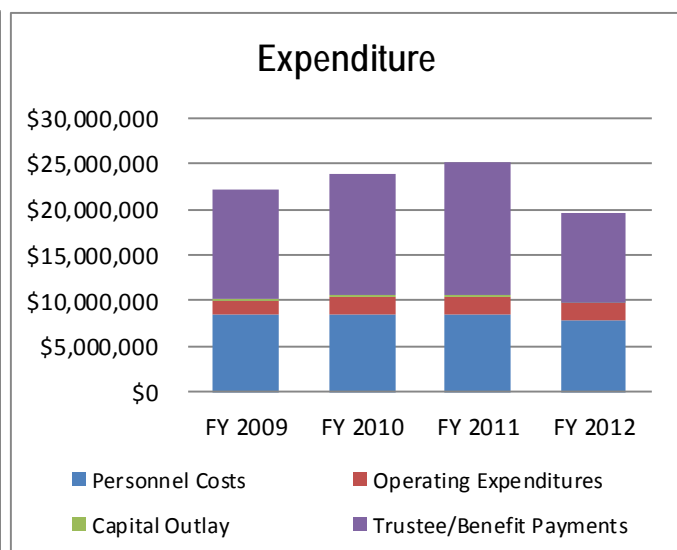
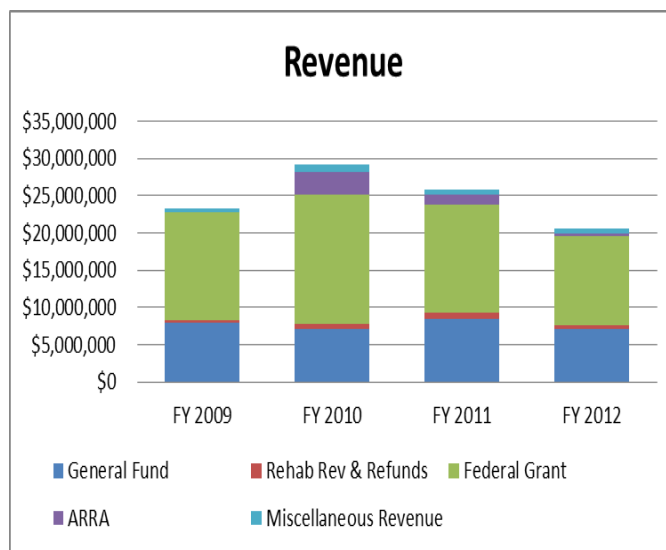


## Vocational Rehabilitation, Idaho Division of

Performance Measurement Report

### Revenue and Expenditures

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
General Fund	\$7,903,100	\$7,113,600	\$8,496,300	\$7,153,000
Rehab Rev & Refunds	\$330,800	\$651,900	\$720,000	\$498,100
Federal Grant	\$14,513,700	\$17,375,300	\$14,558,800	\$11,908,300
ARRA		\$3,037,300	\$1,350,100	\$326,400
Miscellaneous Revenue	\$601,500	\$944,200	\$688,700	\$730,200
<b>Total</b>	<b>\$23,349,100</b>	<b>\$29,122,300</b>	<b>\$25,813,900</b>	<b>\$20,616,000</b>
Expenditure	FY 2009	FY 2010	FY 2011	FY 2012
Personnel Costs	\$8,415,700	\$8,411,800	\$8,395,700	\$7,885,900
Operating Expenditures	\$1,538,900	\$1,935,200	\$2,029,000	\$1,759,400
Capital Outlay	\$137,100	\$203,500	\$287,600	\$25,900
Trustee/Benefit Payments	\$12,052,200	\$13,312,500	\$14,351,000	\$9,937,800
<b>Total</b>	<b>\$22,143,900</b>	<b>\$23,863,000</b>	<b>\$20,063,300</b>	<b>\$19,609,000</b>



### Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
The Number of Individuals Served by Vocational Rehabilitation	13,136	13,631	14,128	14,006
The Number of Individuals Who Went to Work After Receiving VR Services	2,083	1,857	1,896	2083
The Number of Individuals With Chronic Renal Failure Supported	181	196	189	132

*\*IDVR is primarily a federally funded program that assesses performance on a Federal Fiscal Year basis. (October 1-September 30). For this reason, chart data represents figures that are different from State Fiscal year for the first two rows of data reported.*



## Vocational Rehabilitation, Idaho Division of

Performance Measurement Report

### Performance Highlights

The recession and subsequent lack of substantial job creation in the market place continues to be a challenge for IDVR. IDVR is striving to increase capacity by developing new strategies for future success. The following highlights efforts to increase successful rehabilitations:

**Project Search** - Project Search is a high school transition collaborative effort between school districts, the IDVR, Community Rehabilitation Programs (CRP's) and host businesses. It is a national/international training effort to prepare transition students identified as requiring long term supports for the world of work thus helping them move into community employment after high school graduation. Idaho currently has one active project in the Coeur d'Alene area which is a joint effort with VR, Coeur d'Alene and Post Falls school districts, TESH, and Kootenai Health. The Project Search program combines two hours of daily classroom training along with four hours of unpaid internship. These internship experiences are done in three different eight week rotations and can include: housekeeping, dietary, laundry, child care, and equipment transportation. Even though the students may not be hired by the host business, they are better prepared for work and better able to access employment after Project Search completion. At this time, Project Search has only been established in the Coeur d'Alene region.

**Prepared and Connected = Employed(PACE) Job Club** - In collaboration with Idaho Department of Labor (IDOL), the Division has developed a cooperative agreement that provides specialized job search assistance to customers in the Treasure Valley area. At this time, available funding will only support the creation of a job club in this designated area of the state. However, due to the concentration of people within the Treasure Valley, the job club will be able to reach a significant portion of the population.

The purpose of this agreement is to provide a facilitated job club strategy targeted to the unique needs of customers who are applicants for or recipients of IDVR services. The services provided in the IDVR PACE Job Club will not be the usual and customary services provided in a traditional IDOL job club, but will be new, modified, expanded and/or re-configured to have a vocational rehabilitation and disability focus. The customized services provided in the IDVR PACE Job Club are only available to applicants for, or recipients of VR services. The agreement covers Boise, Nampa, Caldwell, and Meridian areas. In the regions not covered by this agreement, a traditional job club continues to be available to all consumers through the IDOL. The PACE Job Club is effectively managed by combining certifiable non-federal monies contributed by IDOL with enhanced federal Rehabilitation Services Administration (RSA) dollars that will be made available to IDVR for services executed under this interagency agreement.

**WorkStrides** – IDVR has implemented a demonstration project of the WorkStrides career preparation workshop. WorkStrides is a Career Development Program that was developed by Washington VR. This is a three day, six hour per day training that addresses a wide range of employability dimensions. Topics include: Exploration of interests, aptitudes, values, identifying barriers to employment, coping with change, self-esteem, decision making, and vocational goal setting. This workshop is designed to improve and expand the preparation of eligible customers preparing for plan development and employment.

In an effort to enhance the transition to employment outcomes for the deaf and hard of hearing students affiliated with the Idaho Educational Services Program for the Deaf and Blind (IESDB) in Gooding, Idaho, IDVR and IESDB engaged in a financial matching arrangement. IDVR has agreed to finance the salaries of two IESDB counselors providing outreach services statewide to IESDB students who are eligible for IDVR services. These counselors work in concert with IDVR counselors across the state to identify and serve students in this targeted population more efficiently and effectively by combining non-federally funded resources contributed by IESDB with enhanced federal Rehabilitation Services Administration (RSA) dollars that will be made available to IDVR. This arrangement not only maximizes the working relationship between the two programs but also provides additional financial resources that can be directly invested in customer service outcomes.

IDVR experienced staff turnover in key positions this past year. Don Alvesshere joined the agency in August 2011 as the new Administrator. A new Chief of Field Services, Nanna Hanchett; Fiscal Manager, Mark Boisselle; Information Technology Manager, Scott Williams; as well as a new Program and Evaluation manager, Jane Donnellan joined the agency during SFY 2012.



## Vocational Rehabilitation, Idaho Division of

Performance Measurement Report

### Part II - Performance Measures

Performance Measure	2009	2010	2011	2012	Benchmark
Number of Individuals Exiting the VR Program Who Achieved an Employment Outcome	2083	1857	1896	2083	2000
Percentage of Individuals Who Exit the VR Program After Receiving Services Who Are Determined to Have Achieved an Employment Outcome	65.9%	64.8%	63%	59.8%	55.8%
Average Hourly Earnings of Individuals Exiting the VR Program Who Achieved an Employment Outcome During the Current Year	\$10.04	\$10.24	\$10.66	\$10.66	\$10.15
Number of Individuals Involved With the Correctional System Exiting the VR Program Who Achieved an Employment Outcome	481	461	418	340	400
Percentage of Community Supported Employment clients served through the Extended Employment Services program	52.18%	53.49%	48%	56.7%	53%

#### Performance Measure Explanatory Notes:

The benchmark of 55.8% for individuals who exit the VR program after receiving services who are determined to have achieved an employment outcome is a minimum requirement of the agency set by the Federal Rehabilitation Services Administration.

The federal indicator of .52 is the ratio of the average state wage to the average wage of closed cases with an employment outcome that have wages greater than or equal to minimum wage. For FFY 2011, the target was \$8.96.

*\*IDVR is primarily a federally funded program that assesses performance on a Federal Fiscal Year basis. (October 1-September 30). For this reason, chart data represents figures that are different from State Fiscal year for the first four rows of data reported.*



Vocational Rehabilitation, Idaho Division of

Performance Measurement Report

**For More Information Contact**

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E-mail: [don.alveshere@vr.idaho.gov](mailto:don.alveshere@vr.idaho.gov)



Vocational Rehabilitation, Idaho Division of

Performance Measurement Report

***Director Attestation for Performance Measurement Report***

In accordance with *Idaho Code 67-1904*, I certify the data provided in the Performance Measurement Report has been internally assessed for accuracy, and, to the best of my knowledge, is deemed to be accurate.

Department: IDVR

Donald Chesebrough  
Director's Signature

8/6/12  
Date

Please return to:

Division of Financial Management  
Attn: Cheryl Richardson  
304 N. 8<sup>th</sup> Street, 3<sup>rd</sup> Floor  
Boise, Idaho 83720-0032

FAX: 334-2438  
E-mail: [cheryl.richardson@dfm.idaho.gov](mailto:cheryl.richardson@dfm.idaho.gov)



**Idaho Public Schools**

**Performance Measurement Report**

***Part 1 – Agency Profile***

**Agency Overview**

The State Department of Education (SDE) manages K-12 public education in the State of Idaho and provides school districts and charter schools with the technical assistance they need to raise student achievement. The vision of the State Department of Education is to establish an innovative and flexible education system that focuses on results, inspires all students and prepares them to be successful in meeting today's challenges and tomorrow's opportunities. The Department's mission is that the State Department of Education is accountable for the success of all Idaho students. As leaders in education, we provide the expertise and technical assistance to promote educational excellence and highly effective instruction.

**Core Functions/Idaho Code**

Pursuant to Title 33, chapter 1, Section 125, there is hereby established as an executive agency of the state board of education a department known as the State Department of Education. The State Superintendent shall serve as the executive officer of such department and shall have the responsibility for carrying out policies, procedures, and duties authorized by law or established by the State Board of Education for all elementary and secondary school matters, and to administer grants for the promotion of science education as provided in sections 33-128 and 33-129, Idaho Code.

**Revenue and Expenditures**

<b>Revenue</b>	<b>FY 2008</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
General Fund	1,367,363,800	1,418,542,700	1,141,346,300	\$1,276,714,400*	\$1,223,580,400
Federal Grant	193,007,800	195,782,100	187,847,000	201,823,200	215,550,000
Dedicated Fund	<u>11,874,900</u>	<u>7,210,300</u>	63,825,900	91,054,700	68,547,400
ARRA Stimulus			<u>211,509,800</u>	56,275,700	16,660,700
Ed Jobs Fund				<u>16,113,000</u>	<u>30,999,800</u>
<b>Total</b>	<b>1,572,246,500</b>	<b>1,621,535,100</b>	<b>1,604,529,000</b>	<b>1,641,981,000</b>	<b>1,555,338,300</b>
<b>Expenditure</b>	<b>FY 2008</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	184,000	352,400	372,700	375,400	425,000
Operating					
Expenditures	1,090,100	5,403,800	4,907,700	3,436,800	5,928,900
Capital Outlay		26,700	3,100		1,500
Trustee/Benefit					
Payments	<u>1,619,455,300</u>	<u>1,671,872,300</u>	<u>1,648,816,500</u>	<u>1,644,607,000</u>	<u>1,542,808,300</u>
<b>Total</b>	<b>1,620,729,400</b>	<b>1,677,655,200</b>	<b>1,654,100,000</b>	<b>1,648,419,200</b>	<b>1,549,163,700</b>

\*Previous report did not include the \$59,934,000 that was distributed for maintenance of effort at the end of FY11 (SB1207).



### **Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2008</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Number of School Districts Supported	115 districts 30 charters	115 districts 31 charters	115 districts 36 charters	115 districts 40 charters	115 districts 43 charters 1 COSSA
Number of Public School District (K12) Students	272,058	275,075	278,522	281,432	281,772
FTE Student Teacher Ratio	18.12	18.20	18.30	18.30 est	18.56

### **Performance Highlights**

Idaho's public schools continued to perform well in the 2011-2012 school year. The school year represents the first full school year of implementation of Students Come First. The focus of Students Come First is to pay our best teachers better, provide teachers and students with 21<sup>st</sup> Century tools, create educational equity, and return local control. To achieve those goals, educators will receive more than \$38 million in pay for performance bonuses in November because of increases in academic growth and achievement. Schools received \$13.1 million in classroom technology dollars to give students and teachers 21 Century tools and professional development. In addition, more than 17,000 juniors took a college entrance exam, paid for by the state, to fulfill the State Board of Education's plan for high school redesign, and students who completed their high school graduation requirements early could take up to 36 dual credits paid for by the state.

The state also continues to focus on providing teachers and parents accurate data on student achievement through the Idaho System for Educational Excellence (ISEE) as well as the learning management system: Schoolnet. Through the generous contribution of the J.A. and Kathryn Albertson Foundation, all districts can now access the basic offerings in Schoolnet and other districts can apply to pilot the full suite in the statewide learning management system before it is launched statewide. Through the Schoolnet, teachers can access sample lesson plans, digital content and sample test questions as well as student achievement data. Six districts were in the first cohort of districts to pilot and now 15 districts are piloting the system.

FY 2013 is the first year for public schools to receive increases. Funding for the Idaho Math Initiative, Idaho Reading Initiative, ISAT Remediation, and \$4 million for limited English proficient (LEP) student programs was maintained, in addition to \$4.8 million to hire more math and science teachers, \$963,000 to pay for every junior to take the SAT, and millions in classroom technology and professional development.

The Department continues to provide professional development to improve school climate and student achievement results. One of its most successful programs, the Idaho Building Capacity (IBC) Project, is currently serving 97 sites throughout the state. When this project began in January 2008, it served just 19 schools and districts statewide. Now, the IBC project has expanded to serve 112 schools and 45 districts. Through this project, local school districts and schools that have been identified for needs improvement receive hands-on assistance from a Capacity Builder – a recently retired, highly distinguished educator. Many sites within the Idaho Building Capacity Project see gains in student achievement, make Adequate Yearly Progress (AYP), and sustain these successes.

In addition to the IBC project, the State Department of Education supports several other initiatives that provide technical assistance and support to schools and districts that have been identified for needs improvement. Those initiatives include, the Network of Innovative School Leaders (NISL), formerly known as the Principal Academy of Leadership (PALs), the Idaho Superintendents Network, Instructional Core Focus Visits and the review of web-based school improvement plans. NISL is currently serving 20 principals while the Superintendents Network is currently serving 35 superintendents representing 292 schools and public charters statewide. In 2011-2012 the Idaho State Department of Education facilitated 21 Instructional Core Focus Visits, and reviewed and provided technical assistance to 418 schools in the use of the WISE Tool for school improvement planning.



**Part II – Performance Measures**

Performance Measure	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	Benchmark
Percent of Students Who Complete high school	88.29	89.70	61.69	91.7	92.4	Not yet available	100%
Number of Highly Qualified Teachers (HQT) Teaching in Their Area of Specialty as a Percentage of the Total Teaching Population	70.30%	93.06%	95.52%	96.6	95.6%	96.3%	100%
Percentage of K-12 Students Meeting or Exceeding Idaho Standard Achievement Test (ISAT)*							
- Reading	79.8%	83.7%	82.9%	87.7%	88.5%	89.3%	100%
- Mathematics	75.7%	77.5%	75.1%	80.5%	80.4%	80.7%	100%
- Language Usage	67.6%	71.1%	69.7%	74.8%	75.1%	76.9%	100%
- Science (grades 5,7,10)	53.0%	59.3%	63.6%	62.1%	64.5%	67.0%	100%
Number of Schools Receiving Technical Assistance	461	348	292	325	253	202	N/A

\*Results calculated based on all students who took the test regardless of length of enrollment.

**Performance Measure Explanatory Notes:**

**Number of Highly Qualified Teachers Teaching in Their Area of Specialty as a Percentage of the Total Teaching Population:**

This data point for FY2011 is not yet available.

**Percentage of K-12 Students Meeting or Exceeding Idaho Standard Achievement Test (ISAT):**

The benchmark for 2014 is that students will be 100% proficient or advanced. Idaho has kept its proficiency targets for AYP the same in the 2011-2012 school year as it pursues a federal waiver from certain portions of the No Child Left Behind law.

**Number of Schools Receiving Technical Assistance:**

The State Department of Education offers technical assistance to every public school, district and charter school in the state of Idaho through a variety of programs as well as through constant e-mail, phone and face-to-face communication. The data presented in this chart represents the number of schools that are offered technical assistance from the State Department of Education because they were in School Improvement status for the 2011-2012 school year.

**For More Information Contact**

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## University of Idaho–Agricultural Research and Extension

Performance Measurement Report

### **Part 1 – Agency Profile**

#### **Agency Overview**

The Agricultural Research and Extension Service (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 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 the needs in Idaho's agriculture, natural resources, youth and family and related areas.

#### **Core Functions/Idaho Code**

Conduct educational outreach programs through the University of Idaho Cooperative Extension system. Conduct fundamental and applied research programs through the Idaho Agricultural Experiment Station.

### **Ag Research and Extension**

#### **Revenue and Expenditures:**

<b>Beginning Fund Balance</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
	\$ 0	\$ 0	\$ 0	
<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
General Fund	\$ 27,002,088	\$ 23,490,500	\$22,559,000	\$22,559,000
Federal Grant	4,562,982	3,919,138	4,369,246	3,909,353
Misc Revenue	0	0	0	0
Restricted Equine Education	18,596	5,220	4,444	24,014
<b>Total</b>	<b>\$ 31,583,666</b>	<b>\$ 27,414,858</b>	<b>\$ 26,932,690</b>	<b>\$26,492,367</b>
<b>Expenditure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	\$ 27,060,398	\$ 25,275,336	\$22,504,806	\$21,946,299
Operating Expenditures	3,174,113	1,881,705	3,149,265	3,554,785
Capital Outlay	1,066,935	263,631	657,726	969,866
Trustee/Benefit Payments	30,999	0	0	5,109
<b>Total</b>	<b>\$ 31,332,445</b>	<b>\$ 27,420,672</b>	<b>\$26,311,807</b>	<b>\$26,475,059</b>
<b>Ending Fund Balance</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
	\$ 0	\$ 0	\$ 0	0

#### **Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Number of Youth Participating in 4-H	36,069	36,383	33,175	33,163
Number of Individuals/Families Benefiting from Outreach Programs	427,655	412,489	366,275	338,523
Number of Technical Publications (research results) Generated/Revised	317	155 (CES)	341 (170 CES)	187 (CES)



## University of Idaho–Agricultural Research and Extension

Performance Measurement Report

### Performance Highlights:

#### **University of Idaho Extension Success for Young Adults**

Preparing young people to succeed as adults is an ongoing mission for University of Idaho Extension. Because most teenagers in Idaho enter the workforce in food services jobs, UI Extension faculty and extension-trained school teachers teach the food safety and safe food handling course *Ready, Set, Food Safe* in 113 classrooms across Idaho. During the past year, more than 3,350 students took the course and 2,493 (74%) passed the certification with 80% or higher, which means they received their Idaho Food Handler's Certificate. After high school, UI Extension has made the most of grant-funded after school programs by using AmeriCorps VISTA volunteers to help fight poverty in seven Idaho communities. These young adults help limited-resource children gain greater success at school through projects in science, technology, culture and healthy living.

University of Idaho Extension educators have partnered with the Idaho Credit Union League to help Idaho's high school teachers receive the training necessary to meet the State's financial education standards in personal finance education. The partnership has resulted in High School Financial Planning Program (HSFPP) teacher workshops attended by 440 high school teachers and participants from 41 Idaho counties to date. In turn, these participants have taught the curriculum to more than 40,000 students in schools, correctional facilities, church groups, Indian reservations, and other Idaho settings.

#### **Support for Small Communities**

Eight rural Idaho communities benefited from Extension partnerships that brought Landscape Architecture graduate students to create designs for local improvement projects. The resulting designs, like many other Extension-assisted products, are critical inputs for local funding initiatives to succeed. Another community development program in 2012 has resulted in publication of *Artisan Trails*, a guide to tourist amenities in north central Idaho (and adjacent Washington towns). The Extension community development program is also credited with helping New Meadows win a \$50,000 Gem Grant from Idaho's Department of Commerce to improve its community.

#### **A Healthier Idaho**

Overweight and obesity issues are consuming Idaho and the Nation. UI Extension educators and paraprofessionals teach nearly 1,000 educational events per year to help children, adults, and seniors adopt diet and physical activity practices that will reduce medical costs, increase longevity, and improve their quality of life. A majority of these classes target low-income families and are funded through grants received by faculty. More than half of participants report an improved diet, and increased activity. Ongoing research seeks to validate the actual magnitude of savings for Medicaid and county indigent health services. In Idaho County, since 2009, 600 men and women have participated in UI Extension's annual Biggest Loser Weight Loss Challenge. Combined, they lost 2,357 pounds, an average of 2.8% body fat per person.

#### **Agriculture and the Food Industry**

University of Idaho Extension presented an educational conference for Beef Cattle producers. The conference focused on the genetic and economic benefits of modern artificial insemination and estrus management practices. Post-program surveys indicated that more than 70% of attendees would adopt a new estrus synchronization management practice to increase reproductive efficiency. Surveys estimate that information learned will add a \$20 to \$30 value to each calf. Ranches represented at the symposium owned 60,000 to 80,000 cows. Based on a \$20 increase in value for 60,000 calves, the economic impact of this program was \$1.2 million. Follow-up workshops and demonstrations are sharing these technologies with an even larger audience.

Food processors are closely regulated, and small companies that fail to pass very complex annual food safety audits risk losing business to big customers such as Wal-Mart, Safeway, and WinCo. Since 2005, the UI Extension Food Processing Specialist has worked with some 50 Idaho food companies from throughout the State. Surveys from companies served by Extension indicate more than \$108 million dollars have been saved over the past seven years, and 433 jobs that were either retained or created because of this Extension program.



## University of Idaho–Agricultural Research and Extension

### Performance Measurement Report

#### *Part II – Performance Measures*

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	Benchmark
Number and Dollar Value of External Agricultural Research Grants	\$17.6M	\$18.2M	\$21.9M	\$11.8M	\$20M
Number/Type of New Commercial Crop Varieties Developed	6 (Potato, Bean and Rapeseed)	7 (Wheat, Barley, Potato and Bean)	2 (Wheat and Potato)	4 (Wheat and Potato)	6/year
Number of Research Programs Undertaken/Completed	87	85	92	93	100
Dollar Value of External Funds Generated Through Partnerships to Support Agricultural Research Centers	0	\$528K	\$554K	\$624K	\$1M

#### **Performance Measure Explanatory Notes:**

The cases managed data for each fiscal year reflects data collected for the previous fiscal year due to the lag in gathering the information.

#### **For More Information Contact**

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## Health Programs—ISU Family Medicine Residency

Performance Measurement Report

### **Part I – Agency Profile**

#### **Agency Overview**

There are two family medicine residencies in Idaho – the ISU Family Medicine Residency (ISU FMR) in Pocatello and the Family Medicine Residency of Idaho (FMRI) in Boise. Both programs are funded from State allocations, grants, local hospitals, Medicare and patient revenues. Idaho State University is recognized by the Accreditation Council for Graduate Medical Education (ACGME) as the official sponsoring institution of ISU – Family Medicine Residency (ISU FMR). Jonathan Cree, M.D. is the Director of the ISU FMR and Department Chair.

#### **Core Functions/ Idaho Code**

**1. Training family physicians to provide care to populations throughout Idaho, both rural and urban.**

Idaho is 49<sup>th</sup> out of 50 in physician per capita state statistics in the USA and has a special problem recruiting physicians to settle in isolated rural Idaho. Both residency programs have an excellent track record of recruiting family physicians that settle and stay in Idaho, and give Idaho the honor of being the eighth state in the nation in retention rates. The ISU FMR has 21 medical residents, two pharmacotherapy residents and 3 psychology interns in training, and graduates seven new family physicians each June. Forty-five of ISU's 89 graduates have stayed in Idaho.

**2. Provision of services to underserved populations in Idaho:**

Reimbursement for medical services has been declining, while program costs have been climbing. The ISU FMR provides over \$2.2 million in medical services to Medicaid, Medicare, and the indigent. Approximately 50% of the \$3 million (or \$1.75 million) annual charges are written off to bad debt and contractual adjustments. The ISU FMR staffs community services such as the Health Department, adolescent detention centers, prison services, free clinics and HIV clinics. The Indian Health Service, migrant workers, nursing home residents, behavioral health unit patients, developmentally challenged children, and the home-bound also receive medical support from the residents and faculty.

#### **\*Revenue & Expenditures**

<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
General Fund	\$747,300	\$870,900	\$877,200	\$857,300
<b>Total</b>	<b>\$747,300</b>	<b>\$870,900</b>	<b>\$877,200</b>	<b>\$857,300</b>
<b>Expenditure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	\$474,500	\$572,400	\$566,300	\$566,300
Operating Expenditures	\$272,800	\$298,500	\$310,900	\$291,000
Capital Outlay	\$ 0	\$ 0	\$ 0	\$ 0
<b>Total</b>	<b>\$747,300</b>	<b>\$870,900</b>	<b>\$877,200</b>	<b>\$857,300</b>

#### **Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY2012</b>
Number of Residents in Training	18	19	20	21
Average Total State Funded Dollar Cost per Resident as a Percent of Total Residency Training Costs	12.9%	14.5%	14.1%	12.7%
Number of Health Profession Students (non-physician) Receiving Clinical Training at FMR Facilities	7	2PA 3NP, 5Psych, 7 dietetic (17)	1PA 1NP 6 Psych, 8 dietetic (16)	2NP, 3psych, 12 pharmacy (17)

#### Dollar Cost per resident

State dollars received by ISU FMR are \$857,300. Approximately 20% of these dollars are used for departmental support, leaving \$686,000 for 20 residents or \$34,000 per resident as our best estimate of dollar cost per resident. Total departmental budget is \$6.7M; \$857,300 is 12.7%. Components specifically attributed to residency costs is 10%.



## Health Programs—ISU Family Medicine Residency

Performance Measurement Report

### Performance Highlights:

Clinical Service Grants: The ISU FMR has active clinical grant writers who pursue grants to help offset residency deficits and enrich the clinical training. Over the last decade, these grants have assisted funding outreach to rural perinatal populations in American Falls and Aberdeen, uninsured GYN patients with pre-cancerous lesions of the uterine cervix, education in the New Model Office Paradigm and Quality Improvements. Total Title VII awards and clinical grants between 1999 and 2012 were \$5.9 million.

New Title VII Award 2008 - 2011: ISU FMR received notice of a \$900,000 award to promote interventions in exercise, nutrition and lifestyle choices at all phases of the family life cycle. We combined a powerful, multi-disciplinary health resource personnel team that fostered the evolution of a new Therapeutic Lifestyle Center in our Family Medicine Clinic. These innovations were facilitated by an enhanced healthcare information technology infrastructure and the development of a Medical Home Business Model. In 2011, we received a 5-year \$1 million grant (Baby Boomer Medical Home) over 5 years that will continue this work in the senior population and a new Hepatitis-C treatment grant for our infected patients.

Primary Care Expansion: The ISU FMR Program (Residency) is a well-established university sponsored, community-based, fully accredited 6-6-6 expanding to 7-7-7 residency with a strong emphasis on care for the underserved and preparation for broad-spectrum rural practice. Family medicine residents receive clinical training in a sole community hospital and a community health center, caring for a culturally diverse and underserved patient population. The Idaho PCRE Project will allow the Residency to expand from its current resident complement of 18 total residents to 21 total residents over a five year period. We will begin our year with 21 residents with one completing residency in September. We will achieve our full 21 resident capacity July 1 2013.

Research Division: The ISU FMR sponsors an active and successful research division. We are the recipients of three prestigious NIH multi-center trials, AIMHIGH, CAPTION and ACCORDION. The division was a major contributor to the ACCORD study which was completed in December 2010 and changed the approach to diabetes all over the world. More recent grants are called On Target, Tecos and Duke Exscel. A staff of highly qualified research assistants and coordinators service these grants; and the clinical research division is extremely productive in scholarly research publications. At the present time the ISU FM Research Division has secured over \$3M million in research funding.

New Access Point CHC Grant: For the past 4 years, the ISUFMR has been researching a financially viable way to merge the Pocatello Family Medicine clinic (teaching clinic of the residency) with the community health center operation of Health West. On June 20, 2012 it was announced in a second round of grant awards that the Health West ISUFMR New Access Point application was successful. During the next academic year, the clinic will be able to expand its outreach and access to the indigent and underserved of Pocatello. The FMRI in Boise became a Federally Qualified Health Center (FQHC) through a different funding mechanism 3 years ago. These FQHC funds will stabilize the residency and reduce the subsidies that Portneuf Medical Center and ISU provide. These funds are patient care funds as opposed to state funding, which specifically supports residency education.

### Part II – Performance Measures

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	Benchmark
Percentage of Physician Residents Graduating	100%	100%	100%	100%	100%
Percentage of Graduates Successfully Completing Board Examination <sup>1</sup>	100%	83%	83%	pending	100%
Percentage of Resident Training Graduates Practicing in Idaho	49%	50.6%	40%	49%	50%
Number of Residents Matched Annually <sup>2</sup>	8	6	7	7	7
Percentage of Qualified Idaho Residents Offered an Interview for Residency Training	100%	100%	100%	100%	100%
Number of Title VII Clinical Service Grants Awarded	2	2	2	1	1 in 6 years
Retention of Full continued accreditation status with a five-year revisit cycle <sup>3</sup>	Full/5 years	Full/5 years	Full/5 years	Full/5 years	Full/5 years



## Health Programs—ISU Family Medicine Residency

Performance Measurement Report

### Performance Measure Notes:

<sup>1</sup> Scores are not released until mid September each year.

<sup>2</sup>Number of Residents Matched Annually: The proposed increase in number of residents was placed on hold owing to financial constraints

<sup>3</sup>Accreditation Status: Accreditation status may be initial, continued, probationary or withheld. The longest time between accreditation cycles is five years. The ISU FMR has the best accreditation status possible.

### For More Information Contact

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## University of Idaho–Forest Utilization Research

Performance Measurement Report

### *Part 1 – Agency Profile*

#### **Agency Overview**

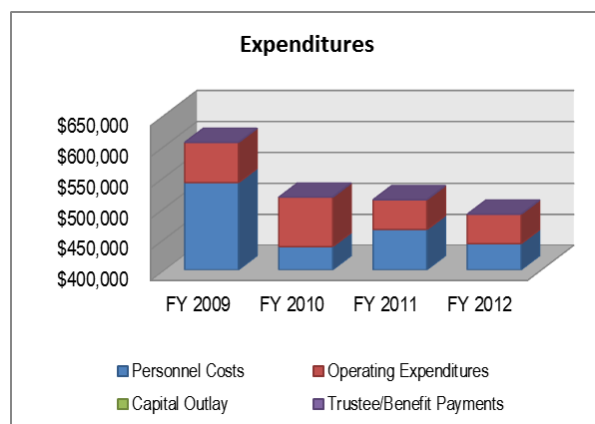
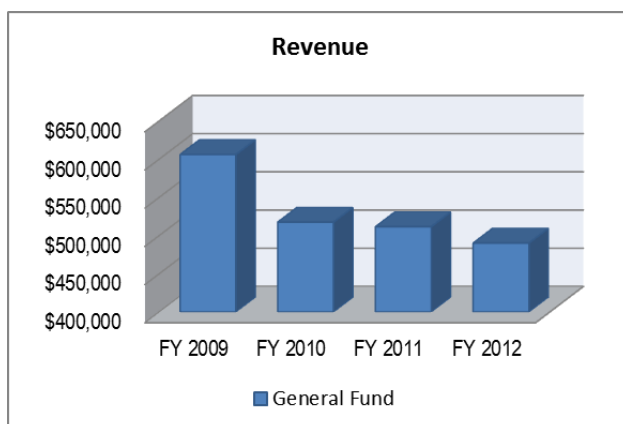
Research mission – investigation into forestry and rangeland resource management problems, forest nursery production, and related areas. Part of the College of Natural Resources, Forest Utilization Research also includes the Rangeland Center with a legislative mandate for interdisciplinary research, education and outreach as suggested by a partner advisory council to fulfill the University's land grant mission (Idaho Code § 38-715), and the Policy Analysis Group with a legislative mandate to provide objective data and analysis pertinent to natural resource and land-use issues as suggested by an advisory committee of Idaho's natural resource leaders (Idaho Code § 38-714).

#### **Core Functions/Idaho Code**

The duty of the Experiment Station of the University of Idaho's College of Natural Resources is to institute and conduct investigations and research into the forestry, wildlife and range problems of the lands within the state. Such problems specifically include forest and timber growing, timber products marketing, seed and nursery stock production, game and other wildlife, and forage and rangeland resources. Information resulting from cooperative investigation and research, including continuing inquiry into public policy issues pertinent to resource and land use questions of general interest to the people of Idaho, is to be published and distributed to affected industries and interests. (Idaho Code §§ 38-701, 38-703, 38-706, 38-707, 38-708, 38-709, 38-710, 38-711, 38-714, 38-715)

#### **Revenue and Expenditures:**

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
General Fund	\$ 605,900	\$ 517,500	\$511,400	\$490,000
<b>Total</b>	<b>\$ 605,900</b>	<b>\$ 517,500</b>	<b>\$511,400</b>	<b>\$490,000</b>
Expenditure	FY 2009	FY 2010	FY 2011	FY 2012
Personnel Costs	\$541,100	\$ 437,700	\$465,244	\$442,430
Operating Expenditures	64,800	79,800	48,156	47,570
Capital Outlay	0	0	0	0
Trustee/Benefit Payments	0	0	0	0
<b>Total</b>	<b>\$ 605,900</b>	<b>\$ 517,500</b>	<b>\$511,400</b>	<b>\$490,000</b>





**University of Idaho–Forest Utilization Research**

Performance Measurement Report

**Profile of Cases Managed and/or Key Services Provided:**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY2012</b>
Number of Private Landowners Assisted: Pitkin Forest Nursery	1600	1300	1300	1400
Number of Seedling Industry Research Projects: Pitkin Forest Nursery	2	2	3	3
Number of:				
• Research Projects:				
Experimental Forest	13	8	7	13
Policy Analysis Group	9	6	6	8
Pitkin Forest Nursery	11	10	12	10
Rangeland Center	*	*	2	4
• Teaching Projects:				
Experimental Forest	28	30	21	24
Policy Analysis Group	25	26	20	24
Pitkin Forest Nursery	5	5	5	5
Rangeland Center	*	*	2	9
• Service Projects:				
Experimental Forest	7	2	5	9
Policy Analysis Group	19	14	14	15
Pitkin Forest Nursery	12	15	15	12
Rangeland Center	*	*	2	4

\*The Rangeland Center was initiated in FY2011.

**Performance Highlights:**

**Experimental Forest:**

**Highlights:**

*Research* – 13 research projects include graduate and undergraduate student involvement to collect and analyze data.

*Education* – Classroom involvement – 9 faculty, 12 different class courses, 24 field trips, 20 follow up lab sessions, involving more than 300 students with hands-on experience.

*Internships* – 13 student intern workforce applies interdisciplinary academic learning that includes critical thinking and problem-solving experience. Student interns are exposed to a wide array of land management experiences involving multiple resources and the challenge of addressing regulatory policies with scientific information.

*Outreach* – 9 outreach and engagement activities include school teachers, loggers, professional foresters, non-industrial private forest land owners, and interested Idaho citizens. Hosted activities on a pair of active and completed harvest sites, where multiple objectives are achieved via management activities.

The centerpiece of the University of Idaho Experimental Forest (UIEF) is the 8,247 acres of forest land on Moscow Mountain that are adjacent to both industrial and non-industrial private forest lands surrounded by dry land farming in Latah County. Today all but 450 acres are managed as working forests, balancing education, research, and demonstration with production of timber, clean water, fire hazard mitigation, smoke particulate management, and wildlife and fisheries habitat. The UIEF also manages 398 acres in two parcels in Kootenai County, and has a life estate of 1,649 acres in Valley County that someday will come under UIEF management. As noted in the highlights above and details below, these lands provide many research, education and outreach opportunities.



University of Idaho–Forest Utilization Research

Performance Measurement Report

Research conducted on the UIEF in FY2012 provided original data for seven projects conducted by College of Natural Resources faculty, as well as four more research projects conducted by College of Agriculture and Life Sciences and one partnering with USDA Forest Service (Rocky Mountain Research Station). Today's graduate students who collect and analyze these data become tomorrow's scientists and organization leaders.

Education involving hands-on experience to supplement classroom and laboratory exercises is a significant and valuable supplement to a college education in forest utilization. In FY2012 nine faculty members – College of Natural Resources (7), College of Agriculture and Life Sciences (1), and Washington State University (1) – used the UIEF for at least one field trip session during twelve different courses, ranging from an introductory freshman orientation to senior and graduate level courses demonstrating current research knowledge and land management practices. In total more than 300 university students visited the UIEF on 24 field trips, with an additional 20 follow-up laboratory sessions in which data collected during field trips were analyzed.

Internship opportunities for students have been offered by the UIEF since 1972. In FY2012 the UIEF employed 13 students as the multidisciplinary workforce of choice, successfully completing the 39<sup>th</sup> consecutive year of the Student Logging Crew Program, like previous season, without a single injury to report. Staff provide hands-on education as the students help accomplish the management objectives in the UIEF strategic plan, helping the College fulfill the duties of the Experiment Station as described in Idaho Code above. Student employee interns are required to think critically and solve problems on a daily basis, thus are acquiring job skills beyond just accomplishing the work-at-hand. These work assignments include technology transfer as students learn to employ state-of-the-art equipment and techniques, as well as incorporating their interdisciplinary academic learning in an operational and research forest setting. Upon graduation these student employee interns generally have little trouble finding employment.

Outreach and engagement conducted on the UIEF and by the staff attract Idaho citizens of all ages and all walks of life, from school teachers to loggers and foresters. Nine such activities were conducted in FY2012. For example, a Palouse/Snake River chapter of the Society of American Foresters (SAF) field trip included a stop at the UIEF for discussion of active timber sales as a means to achieve multiple objectives, including creating field research sites as well as opportunities for outdoor educational learning. One particular problem they focused on is reducing fuels that pose a wildfire hazard by removing woody biomass as well as conventional timber stumpage. These features were demonstrated by a harvest in progress and a completed harvest and its resultant site uses by researchers and faculty for educational purposes.

**Policy Analysis Group:**

**Highlights:**

*Economic Contributions* – The role of the forest products manufacturing industry in the Idaho economy was featured in publications prepared for the Idaho Legislature's Economic Outlook and Revenue Assessment Committee. Presented results of analyses of endowment lands, including their economic contributions, to the Idaho Legislature's Natural Resources Interim Committee. Presented results of analysis of economic contributions of federal timberlands in Idaho to Rep. Raúl Labrador's staff.

*Director Involvement* – Actively participated in each meeting of the Governor's Sage Grouse Task Force, providing information on strategies for mitigating effects of wildfire on sage-grouse habitat, and at the request of the Governor's Office, compiled the task force's recommendations report. Represented Idaho on the Western Governors' Forest Health Advisory Committee and played a leadership role. Chaired the Idaho Strategic Energy Alliance's Forestry/Biomass Task Force. The 2012 Idaho Energy Plan, prepared by the Legislature's Energy, Environment and Technology Interim Committee with the assistance of the Idaho Strategic Energy Alliance, included a section on bioenergy resources written by the PAG Director.



Publication highlights included an updated revision of a Policy Analysis Group report on Idaho's state endowment lands, which in August prompted an invitation to open the two-day hearings of the Natural Resources Interim Committee on endowment trust asset management issues with presentation of the report. Also in August, at the request of Rep. Raúl Labrador's staff, the Director published and presented an issue brief on the expiring Secure Rural Schools Act and the funding used for county roads and schools in rural Idaho in lieu of revenue-sharing from federal land timber sales; in September the Director was invited to accompany Rep. Labrador during his presentation on federal land management during the Idaho Association of Counties annual meeting. In January, the economic contributions of the state's natural resource-based industries were featured in publications made available for the Idaho Legislature's Economic Outlook and Revenue Assessment Committee meeting immediately before the 2012 legislative session began.

During engagement with the Governor's Sage Grouse Task Force from March through May, the Director gave three presentations on wildfire, one of the leading threats to sage-grouse habitat conservation and the focal point of a recent Policy Analysis Group report on rangeland fuel treatments published in December. The Director continues to chair the Forestry/Biomass Task Force for the Idaho Strategic Energy Alliance (ISEA), and in that role contributed to the 2012 Idaho Energy Plan as well as leading a biomass roundtable conducted by the Center for Advance Energy Studies (CAES) Energy Policy Institute (EPI) and with the EPI Director published the roundtable report in April.

The Director continues to be actively engaged in other state, regional and national task forces and committees dealing with policy issues of importance to Idaho. This includes a leadership role with the Western Governors' Association Forest Health Advisory Committee (WGA-FHAC), for which the Director drafted a policy resolution adopted by the WGA on the use of forest biomass as an energy feedstock. On behalf of the WGA-FHAC he gave a presentation in November to the Wildland Fire Leadership Council when it met in Denver on the importance of active management of federal forest lands as a wildfire management strategy. Other invited expense-paid presentations at regional and national meetings during the year included Restoring the West Conference on Sustaining Forests, Woodlands, and Communities Through Biomass Use (Logan, Utah); Watershed Moments – People, Forests and Water (Starker Lecture, Oregon State University); Rocky Mountain Forest Restoration and Biomass Summit (Denver); International Biomass Conference and Exposition (Denver); and Trust Management – A Viable Option for Public Forest Lands? (Portland, Oregon).

The Director also presented results of analysis projects at continuing education events conducted by the Idaho Forest Products Commission and the Inland Northwest Foresters' Forum as well as the Logger Education to Advance Professionalism workshops by the University of Idaho Forestry Extension program. In addition the Director was featured in four interviews (three radio and one newspaper). The Director also taught a graduate level policy analysis course, supervised completion of a PhD student in the University's Waters of the West program, advised 8 Master of Natural Resources students (two completed during the year), and served on three graduate student committees.

#### **Pitkin Forest Nursery:**

##### **Highlights:**

*Research* – improve the quality of plant material available for reforestation and restoration throughout Idaho. In collaboration with Potlatch Corp., developed a long-term research project to identify methods of improving tree seedling cost effectiveness throughout the establishment period. Provided plant propagation protocols for use in Idaho's nursery industry, including a much anticipated one for mountain huckleberry.

*Education* – support of 6 graduate students through research at Pitkin Forest Nursery including understanding of tree germination for several Idaho tree and shrub species, problems of stocktype selection. This will facilitate efficiency of seed use in forest management, prediction of natural regeneration and post-fire restoration activities, as well as restoration of degraded forests and rangelands.



## University of Idaho–Forest Utilization Research

Performance Measurement Report

*Outreach* – several workshops and training sessions aimed at improving forest management practices in Idaho, including the Inland Empire Reforestation Council and the Intermountain Container Seedling Growers Association. Activities for children, land management professions and layperson provide further instruction and education.

*Teaching* – provided research and teaching facility for several UI courses which require hands-on nursery experience. This provides experience which is sought by forest tree seedling nurseries throughout the United States.

The Pitkin Forest Nursery continues to actively engage with Idaho landowners, natural resource industries, and citizens. An ever-popular seedling growing program in partnership with the Idaho Forest Products Commission was documented in a web-clip for promoting the University of Idaho and Idaho's Forest Industry. Ongoing research into improved forest management practices included studying the effects of stocktype (the method of production of nursery stock for reforestation and restoration) selection on seedling development. This research topic will provide information and decision support across the state that is anticipated to streamline nursery production practices with the site-specific reforestation needs; a second layer of complexity (managing competing vegetation in the field) will further develop the utility of this information for Idaho. Similar research with rangeland species is also underway. An additional study on seed germination will allow for field foresters to better understand the opportunities for natural regeneration of stands following timber harvesting. In FY2012, six graduate students were working towards degrees through research conducted at the nursery, and many other students are using the facilities at the Pitkin Forest Nursery as a component of their graduate research on forest nutrition and soil management, fire modeling, and post-fire regeneration. The Pitkin Forest Nursery also provided the base facility to be selected by the US Forest Service to develop training materials and conduct research to improve reforestation practices in Lebanon. This fully-funded project created two new research scientist positions based out of Moscow.

Through actively seeking to be a recognized leader in seedling research and technology transfer, we partnered extensively to have our facility serve as the base of training for American and International Students. Activities for children, land management professionals, and laypersons have helped increase understanding of the importance of forestry and natural resource management in Idaho. For example, in March our organization resumed the treasurer/planner role in the Inland Empire Reforestation Council (~200 attendees, Coeur d'Alene) while in October 2011, the 32<sup>nd</sup> Intermountain Container Seedling Growers Association Meeting was held in Moscow and attracted participants from across the state. On the teaching side, several University of Idaho courses used the nursery facilities for hands-on education. Forest tree seedling nurseries throughout the United States are seeking graduates with experience such as that gained at the Pitkin Forest Nursery (4 graduates began career-track positions last year).

### **Rangeland Center:**

#### **Highlights:**

*Research* – 5 research projects can be specifically tied to the collaborative efforts of the Rangeland Center. Researchers in the Rangeland Center were also involved in over 100 related research projects that contribute to our understanding of rangelands and the communities that rely on them.

*Teaching* – 9 university courses taught by 4 faculty members are directly related to rangeland ecology and management research project of the Rangeland Center.

*Service* – 4 important projects of the Rangeland Center were designed for service and outreach for a general audience in the past year

The University's Rangeland Center strives to create insight and foster understanding for the stewardship of rangelands. Rangelands cover half of Idaho, half the West, and half the earth's land surface. Therefore, rangelands affect the ecological health and economic livelihood of our state and region. The



University of Idaho–Forest Utilization Research

Performance Measurement Report

innovative design of the Rangeland Center promotes active partnerships with individuals, organizations and communities who work and live on the vast landscapes known as rangelands. The Rangeland Center is a group of 23 researchers and outreach specialists in the College of Natural Resources and the College of Agriculture and Life Sciences. Our expertise cover several disciplines that affect rangeland management and conservation including grazing, rangeland ecology, entomology, soil science, economics, rural sociology, fish and wildlife resources, invasive plants, forage production, animal science, wildland fire, restoration and the use of spatial technologies to understand rangelands. Our research and outreach efforts are aimed at creating science and solutions for the range.

Research projects conducted by the Rangeland Center in the past year include a project in collaboration with land owners on the use of grazing to reduce wildland fuel loads. Results of this were presented to the Governor's Sage Grouse Task Force. We also worked collaboratively to assess the effects of livestock impacts on slickspot peppergrass (an endangered plant) and the relationship between livestock grazing and the abundance and diversity of insects that provide food for sage-grouse chicks. A project in Lemhi county is quantifying changes in vegetation after exclusion of grazing from riparian areas. Several teams of students are working in a state-wide project to assess rangelands as part of the National Resource Inventory program directed by the Natural Resources Conservation Service.

Several members of the Rangeland Center are involved in teaching university courses that focus on rangeland ecology and management. Five of 9 rangeland courses include extensive field trips where students engage in rangeland examinations and interact with land managers. Three rangeland courses are offered in an on-line format and are accessible to students and professionals who are unable to attend courses delivered only on campus. Two summer courses were offered in a workshop-format designed for high school teacher seeking continuing education courses for teacher certification. The Rangeland Principles course was also offered in cooperation with 4 Idaho high school teachers as a dual credit course where high school student simultaneously gain credit for high school and college credit. Rangeland faculty members also gave dozens of guest presentations to advance the understanding of rangelands in courses throughout campus.

Service and outreach projects in the Rangeland Center this year include development of the Range Science Information System ([www.rangescience.info](http://www.rangescience.info)) which provides ready access to scientific research papers for ranchers and land managers. We also worked with high school Future Farmers of America (FFA) programs to conduct the Idaho FFA Rangeland Assessment Career Development Event for high school students in Idaho and the Western National Rangeland Assessment event for high school students in Idaho, Nevada, and Utah. A summer workshop was also conducted for land owners and managers focused on plant identification and monitoring.

**Other Activities:**

In February, Governor Otter convened a meeting during which the concept of a Sage Grouse Task Force was conceived as a way for the State of Idaho to follow the invitation of the U.S. Secretary of the Interior and develop a conservation strategy that could perhaps preclude the need to list Idaho populations under the Endangered Species Act. College of Natural Resources (CNR) Dean Kurt Pregitzer attended the meeting, during which the Governor asked the University to help with this effort. Since then the Rangeland Center and the Policy Analysis Group have both made substantial contributions to help the Governor's Office develop a sage-grouse conservation strategy. These contributions are identified above.



**University of Idaho–Forest Utilization Research**

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**Part II – Performance Measures**

Performance Measure	FY 2009	FY 2010	FY 2011	FY2012	Bench- mark
Number of New Research Projects Per Year:					
Experimental Forest	6	5	5	10	4
Policy Analysis Group	2	2	1	2	2
Pitkin Forest Nursery	5	5	8	5	5
Rangeland Center	*	*	2	3	2
Goal 2, Objective A, Strategy 1, 2, 3					
Goal 3, Objective A, Strategy 2					
Number of Research Studies Completed/Published Per Year:					
Experimental Forest	1	2	3	3	4
Policy Analysis Group	3	2	1	3	2
Pitkin Forest Nursery	5	8	8	5	5
Rangeland Center	*	*	0	1	2
Goal 3, Objective A, Strategy 1					
Number of Publications:					
Experimental Forest	2	2	3	3	3
Policy Analysis Group	19	14	14	15	10
Pitkin Forest Nursery	12	7	10	12	10
Rangeland Center	*	*	2	8	8
Goal 1, Objective B, Strategy 1					
Number of Workshops Conducted:					
Experimental Forest	6	4	9	6	12
Goal 3, Objective A, Strategy 1					
Policy Analysis Group	25	26	20	24	12
Goal 1, Objective B, Strategy 2					
Pitkin Forest Nursery	21	20	20	20	20
Goal 1, Objective A, Strategy 2					
Goal 3, Objective A, Strategy 2					
Rangeland Center	*	*	2	2	2
Goal 1, Objective A, Strategy 2					

\*The Rangeland Center was initiated in FY2011; its benchmarks were established during FY2012.

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## Health Programs—IDEP Dental Education

Performance Measurement Report

### **Part 1 – Agency Profile**

#### **Agency Overview**

The Idaho Dental Education Program (IDEP) is Idaho's assisted route of access for dental education. There are currently eight (8) seats available for Idaho residents to obtain their dental education. The Program began in 1981 with a cooperative agreement between Idaho State University and The University of Washington School of Dentistry, where five (5) Idaho residents received their dental education. In 1982 the program became a cooperative effort between Creighton University's School of Dentistry in Omaha, Nebraska and Idaho State University in Pocatello, Idaho. The program involves a decentralized first year of education taught at Idaho State University and the second through fourth years taught at Creighton University.

The program currently has five (5) regular employees and five (5) adjunct employees in Pocatello. Dr. Jeff Ybarguen (IDEP graduate) is the program director and works with Dr. Brian Crawford who is the Chair of the Department of Dental Sciences at ISU. Jeri Larsen is the Department Coordinator and works with both the IDEP program and the Idaho Advanced Graduate Dentistry (IAGD) residency program. These programs are located in the same facility at Idaho State University.

#### **Core Functions/Idaho Code**

The mission of the Idaho Dental Education Program is two-fold: First, to provide residents of Idaho with ready access to a high quality dental education; and second, to help the population of Idaho have ready access to high quality dental professionals. As the majority of students graduating from the program return to Idaho to practice, residents of the state have access to high quality dental treatment.

#### **Revenue and Expenditures:**

<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
General Fund	\$1,209,300	\$1,246,500	\$1,315,700	1,312,000
Unrestricted Current	<u>\$301,400</u>	<u>\$342,600</u>	<u>\$410,900</u>	<u>511,200</u>
<b>Total</b>	<b>\$1,510,700</b>	<b>\$1,589,100</b>	<b>\$1,726,600</b>	<b>1,823,200</b>
<b>Expenditure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	\$338,400	\$330,200	\$334,700	319,100
Operating Expenditures	\$15,800	\$12,200	\$6,700	30,900
Capital Outlay	\$2,700	\$3,000	\$1,100	77,300
Trustee/Benefit Payments	<u>\$908,900</u>	<u>\$1,005,400</u>	<u>\$1,052,600</u>	<u>1,095,400</u>
<b>Total</b>	<b>\$1,265,800</b>	<b>\$1,350,800</b>	<b>\$1,395,100</b>	<b>1,522,700</b>

#### **Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Number of Program Applicants	55	52	45	46
Number of Program Applicants Accepted	8	8	8	8
Number of Graduates (since program's inception)	170	178	186	193



## Health Programs—IDEP Dental Education

Performance Measurement Report

### **Performance Highlights:**

The program has been in service since 1981 and has been very successful in accomplishing its mission. Since inception 61% of IDEP graduates have returned to Idaho to practice. The statewide distribution closely follows the state geographic population with 8% of graduates practicing in South Central Idaho, sixteen percent 15% in Northern, 34% in Southeastern, and 43% in Southwestern Idaho. Seventy-one percent of graduates practice general dentistry while 29% practice as specialists. Sixty-five percent practice in Idaho's urban areas with 35% practicing in rural areas. There are currently 10 IDEP graduates furthering their education through residency training and may return to Idaho to practice once they have completed their training.

With approximately six (6) applicants for each seat, the program has been successful in attracting the highest quality students to the program. The average DAT scores and undergraduate GPA's of our students consistently exceed that of the average marks of matriculated students in dental schools nationally. The average scores on the Dental National Board Examination for both Part I and Part II are consistently higher for IDEP students compared to the Creighton average and national average on the same examinations (3-6% higher).

### **Part II – Performance Measures**

Performance Measure	2009	2010	2011	2012	Benchmark
Average student scores on Dental National Boards Part I written examination	84.9%	83.1%	84%	86.4%	>70%
Average student scores on Dental National Boards Part II written examination	85.6%	82.4%	84.4%	85.6%	>70%
1 <sup>st</sup> time pass rate on Clinical Board Examination necessary to obtain dental license*	100%	100%	100%	86%	90%
Number of students in the program**	8	8	8	8	10
Average Cost per student***	33%	34%	33%	37%	<50% National Average
Percentage of IDEP Graduates Returning to Idaho to practice ****	67%	50%	33%	50%	>50%

### **Performance Measure Explanatory Notes:**

\* There were 7 students who took the Clinical Board Examination. Of the 7 students who took the examination, 6 passed all sections on the first attempt. One student did not pass on the first attempt, but has since passed all sections on the second attempt.  
 One of the original 8 students had to slow the educational process due to health reasons. This student is scheduled to graduate with the class of 2015 and will take the Clinical Board Examination at that time.

\*\* Our goal has been to expand the program to facilitate 10 students per year. We currently have 8 students per year in the program and understand that potential expansion of the program will not be considered under the current economic climate.

\*\*\* The cost per DDSE (DDS Equivalent) is a commonly utilized measure to evaluate the relative cost of a dental education program. This information is tabulated in the *ADA Survey of Dental Education*, published by the American Dental Association. From this publication (inflation Adjusted) the national average cost per student for state programs is \$128,331 in 2012. The IDEP cost per student for 2012 was \$47,584 (37% of the national average). The program is accomplishing the goal of providing a competitive value in educating Idaho dentists.



## Health Programs—IDEP Dental Education

Performance Measurement Report

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Our goal is to have greater than 50% of our program participants return to Idaho to practice Dentistry. 4 of the eight 2012 graduates are furthering their education through post-graduate residency programs. 4 past IDEP graduates that have completed post-graduate residency programs this year have returned to Idaho to practice.

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## University of Idaho–Idaho Geological Survey

Performance Measurement Report

### *Part 1 – Agency Profile*

#### **Agency Overview**

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. The agency is staffed by about 9 state-funded FTEs and 20-25 externally funded temporary and part-time employees.

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, mineral-, energy-, and water-resources, landslides and earthquakes.

#### **Core Functions/Idaho Code**

Idaho Code Title 47, Chapter 2, defines the authority, administration, advisory board members, functions and duty of the Idaho Geological Survey. The section contents are:

- **Section 47-201:** Creates the Idaho Geological Survey to be administered as special program at the University of Idaho. Specifies the purpose as the lead state agency for the collection, interpretation and dissemination of geologic and mineral information. Establishes a survey advisory board and designates advisory board members and terms.
- **Section 47-202:** Provides for an annual meeting of the advisory board, and location of the chief office at the University of Idaho. Directs that the director of the Idaho Geological Survey report to the President of the University through the Vice President for Research. Specifies for the appointment of a state geologist.
- **Section 47-203:** Defines the duty of the Idaho Geological Survey to conduct statewide studies in the field and in the laboratory and to prepare and publish reports on the geology, hydrology, geologic hazards and mineral resources of Idaho. Provides for establishment of a publication fund. Allows the Survey to seek and accept funded projects from, and to cooperate with, other agencies. Allows satellite offices at Boise State University and Idaho State University.
- **Section 47-204:** Specifies the preparation, contents, and delivery of a Survey Annual Report.



## University of Idaho–Idaho Geological Survey

Performance Measurement Report

### *Idaho Geological Survey*

#### **Revenue and Expenditures:**

<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
General Fund	\$ 848,100	\$ 714,800	\$701,100	\$671,800
<b>Total</b>	<b>\$ 848,100</b>	<b>\$ 714,800</b>	<b>\$701,100</b>	<b>\$671,800</b>
<b>Expenditure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	\$ 826,800	\$ 693,600	\$685,900	\$625,115
Operating Expenditures	18,006	18,609	\$15,200	\$22,812
Capital Outlay	3,294	2,591	0	\$23,873
Trustee/Benefit Payments	0	0	0	0
<b>Total</b>	<b>\$848,800</b>	<b>\$ 714,800</b>	<b>\$701,100</b>	<b>\$671,800</b>

#### **Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Square Miles of Geological Mapping	684	577	988	916
Number of Educational Programs for Public Audiences	30	20	23	15
Number of Geologic Reports and Presentations	110	119	77	90
Number of Web-Site Viewers	396,318	493,582	452,405	540,774
Number of Grants and Contracts	26	27	15	22



## University of Idaho–Idaho Geological Survey

Performance Measurement Report

### Performance Highlights:

- The Idaho Geological Survey again ranked at or near the top of all STATEMAP funding awards from the National Cooperative Geologic Mapping Program from 2008 through 2012. The number of square miles mapped depends on the scale (detail) of the quadrangle. Digital geologic web maps have a wide range of uses and are the most popular survey products.
- A new geologic map of Idaho in digital format is now completed, reviewed, and ready for publication in FY2013. The previous state geologic map is more than thirty years old. This new version incorporates new research, technology, and age dating. The map also features a spectacular shaded-relief base.
- Announcement of new discoveries of oil and gas in SW Idaho have drastically increased the requests for oil and gas files and drill log information. The survey developed a web-based Google Map application to search the oil and gas file information.
- The Idaho Geological Survey completed the second year of a substantial three-year grant to contribute to the National Geologic Geothermal Data Program.
- The survey completed a study to assess geologic potential for CO<sub>2</sub> sequestration in Idaho.
- Global interest from the mineral industry continues in Idaho's traditional mining products as well as undeveloped rare-earth elements (Rare-earth elements include minerals critical to manufacturing computer processors and batteries).
- The survey completed a two-year study of the geology and hydrogeologic setting of the Mayfield area, Ada and Elmore counties, sponsored by the Idaho Department of Water Resources.
- A two-year study of aggregate characteristics funded by the Idaho Transportation Department is in the second field season.
- Nearly all survey products are now available on the website. More than a half million users visited the Idaho Geological Survey website during the year.

### Part II – Performance Measures

Performance Measure	2009	2010	2011	2012	Benchmark
Number of Published Reports on Geology/Hydrology/Hazards/Mineral Resources	47	39	48	48	45
Cumulative Percent of Idaho's Area Covered by Modern Geologic Mapping	31.4	32.1	34.0	35.2	36.4
Externally Funded Grant and Contract Dollars	\$468,971	\$545,800	\$548,704	\$635,580	\$531,085
Number of Website Products Delivered/Used	242,544	205,519	220,102	202,490	201,463

### Performance Measure Notes:

To meet the needs of modern users, the Idaho Geological Survey has shifted its publication strategy toward digital products delivered through the Internet. Nearly 100% of the survey products are now available on the website.



University of Idaho–Idaho Geological Survey

Performance Measurement Report

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**Special Programs—Idaho Museum of Natural History**

Performance Measurement Report

**Part 1 – Agency Profile**

**Agency Overview:**

Recognizing the importance of our natural heritage to the citizens of the State, the Idaho Museum of Natural History (IMNH) is charged with preserving and interpreting cultural and natural history for the citizens of Idaho. It is the mission of the Idaho Museum of Natural History to actively nurture 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 and is building educational and research collaborations across the state.

The Idaho Museum of Natural History is home to collections in anthropology, archaeology, paleontology, earth science, and the life sciences. It holds an archive of collection related documentation, and field notes, historic and research documents, ethnographic photographs, and audio recordings. It also houses the eastern branch of the Archaeological Survey of Idaho. Researchers pursue scholarly study of the collections and publish their findings in peer reviewed and Museum-sponsored publications. Exhibitions emphasize the collections and mission of the Museum, and include permanent and special offerings. Educational classes for children, families, and adults provide more in-depth exploration of the natural history of Idaho.

**Core Functions/Idaho Code:**

The Idaho Museum of Natural History has two core functions:

- 1) To collect, care for, preserve, research, interpret and present — through educational programs and exhibitions — Idaho's cultural and natural heritage.
- 2) To support and encourage local and municipal natural history museums throughout the state of Idaho.

**Revenue and Expenditures:**

<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
General Fund	\$599,300	\$497,500	\$454,100	\$435,200
Encumbered Funds from FY08	\$17,512	\$0	\$0	\$0
Less budget Holdbacks	<b>\$(37,838)</b>	<b>\$(34,800)</b>	\$0	\$0
<b>Total</b>	<b>\$578,974</b>	<b>\$462,700</b>	<b>\$454,100</b>	<b>\$435,200</b>
<b>Expenditure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	\$546,100	\$434,877	\$440,300	\$420,945
Operating Expenditures	\$13,805	\$27,847	\$13,800	\$12,855
Capital Outlay	\$17,812	\$0	\$0	\$1,400
Trustee/Benefit Payments	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$577,717</b>	<b>\$462,724</b>	<b>\$454,100</b>	<b>\$435,200</b>

**Profile of Cases Managed and/or Key Services Provided:**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Number of General Public Visitors	4,378	2,052	4,212	7,469
Number of Educational Programs for Public Audiences	64	18	27	45
Number of K12 Students on Class Tours	2,481	2,197	3,660	2,836
Outreach Visits to Idaho Schools (42 Trips)	2,611	1,523	1,949	3,060
Number of K12 Tours	104	82	75	97
Exhibitions Mounted	5	0	20	9
Loans from Collections	273	174	37	28
Visiting Scientists	41	3	56	34
Volunteer Hours	1,210	869.5	1850.5	2045.75



## Special Programs—Idaho Museum of Natural History

Performance Measurement Report

- 1) **Collections and Associated Research:** a) Secure space, care and storage of collections; b) access to collections records and other archived information; c) research and presentation of new knowledge. These services are provided to those depositing collections, scholars, other natural history organizations, and Idaho's and others' museums.
- 2) **Education and Training:** on-site and web-based training via workshops, classes, outreach materials, internships, facilitated tours and exhibitions. These are provided to K-12 students, higher education students, instructors and teachers, residents and visitors.
- 3) **Resources, Expertise, and Consultation:** a) natural history object identification; b) specialty equipment for natural history object study; c) technical services supporting collections and research; d) expertise for compliance with Federal and State collections regulations; e) as a venue / space for exhibitions; f) as a source for natural history traveling exhibitions; g) expertise on natural history topics and museology. These are provided to residents, visitors, scholars, organizations and agencies required to repository collections in an accredited 36 CFR Part 79 compliant repository, other natural history organization, Idaho's and others' museums.

### Performance Highlights:

Two major agreements with the Smithsonian Institution were completed. The IMNH is now an Affiliate of the Smithsonian. We signed a two year agreement to provide scanning services to the Smithsonian through the IMNH Virtualization Laboratory.

Two major on-going National Science Foundation awards totaling over 1.25 million were continued.

- The Virtual Zooarchaeology of the Arctic Project is a 3D virtual museum of animal bones. This year we added the complete scans of two orca skeletons, the world's first complete scan of an orca.
- The Alamo Impact Project focuses on describing the crater geometry and ecosystem response to a Devonian bolide impact in southeast Nevada. This year, two MS Geology students completed field mapping and paleontological collecting efforts, and another coauthored the first article submission for the Project, describing size and volume estimates of the Alamo impact. Our two-week educational outreach in June trained K-12 educators and high school female students with field- and classroom-based research activities.

We hosted 28 researchers from outside the museum throughout the Divisions. In addition, Workshops and training seminars were regularly held throughout the museum units. We gave over 50 tours of the collections and facilities to the public and professional communities. We mentored over 30 student employees and volunteers. We participated in a number of K-12 educational programs both in the museum and through visiting local schools. Annual visits from all Federal agencies identified the IMNH as the premier collections facility for federal collections in the region.

Critically important to our service mission as The Idaho Museum of Natural History, the Museum has now begun an effort to put all of our collections on-line in a format readily accessible to the peoples of Idaho. The IMNH Virtual Museum of Idaho will be the foundation for presenting our Natural History to the World. The first stages of this project are now funded by a Technology Incentive Grant from the State of Idaho, and proposals have been submitted to the National Science Foundation.

The Idaho Virtualization Laboratory, funded by the National Science Foundation, is a key part of the museum. We now house one of the INL / CAES 3D Virtual Environment units for 3D visualization and simulation as a long-term loan.

**Exhibits featured at the Idaho Museum of Natural History July 1, 2011 to June 30<sup>th</sup>, 2012 included the following.** These exhibits are representative of the high quality programming that the Museum staff and constituencies are consistently offering the citizens of the State of Idaho

### New Exhibits

Camas: A Biogeographical and Socio-economic Sketch. 1800 ft<sup>2</sup>, Explores the biodiversity and importance of camas prairies to Native Peoples through an interpretive display of specimens and objects from Life Sciences, the



## Special Programs—Idaho Museum of Natural History

Performance Measurement Report

Herbarium, and Anthropology Collections.

Don Crabtree: A Retrospective. 250 ft<sup>2</sup>, Documents the work of renowned flintknapper that paved the way for scientific analyses of archaeological stone tools. Over 100 replica points, drills, and bifaces displayed with archival film footage of Crabtree demonstrating various techniques.

Arctodus simus - Short-faced Bear Skeleton. 62 ft<sup>2</sup>, Addition to Idaho Ice-Age Mammal Display. Reproduction skeleton constructed in gallery to provide visitors with a "behind-the-scenes" experience.

Winter Story. 9 ft<sup>2</sup>, Small mammal adaptations to survive winter conditions

Shoshone Pottery on the Snake River Plain. 9 ft<sup>2</sup>, Early Shoshone pottery and method of manufacture

Ghost Towns of Idaho. 10 linear feet, Student-curated display looking at historic preservation, settlement patterns, economics, and legends surrounding three Idaho ghost towns.

3D Virtual Bones. 20 linear feet, Examples of work created by Museum staff in the IVL

### On-Going Exhibits

- 12,000 years of human activity at the Wasden Site
- What Can Owl Pellets Tell Us About Climate Change?
- Idaho Trackways and Dinosaurs from the Cretaceous
- Gemstones of Idaho
- Live exhibit - Paleo Lab
- Raising the Tolo Lake Mammoth
- Ice Age Mammals of Idaho – featured full mount replicas

### K12 Programs offered throughout the year included:

**Science Trek**, a program offered to 3<sup>rd</sup>, 4<sup>th</sup>, and 5<sup>th</sup> grade children from throughout southeastern Idaho, celebrated its 24th anniversary in April 2012. This program, a partnership with Idaho Public Television, has over the course of 24 years introduced many STEM/scientific disciplines to 3,300 of Idaho's youth by placing them with practicing scientists at Idaho State University.

**The Idaho Geology Outreach Grant (IGO)** project has applied its energies during 2011 – 2012 to concluding the project by finishing the IGO Online web site and submitting the final report. Due to the IGO Project capacity has been built for the delivery of programs and products. The Alamo Impact Project has developed from the IGO project and continues the process of designing and developing the information and products pertinent to the diverse geology of participants' local areas. The Alamo Impact Project worked in June 2012 with nine educators in Nevada and three teen-aged young women to deliver information and experience in the geosciences. The Alamo Impact Project incorporates customizing the format of a professional development component and online learning modules to the localities of rural educators as well as a point-to-point internet lecture aspect to deliver information on the geosciences directly into rural classrooms. The Alamo Project continues into June 2013 with another professional development workshop and Women's Research Experience for teen-aged young women.



**Special Programs—Idaho Museum of Natural History**

Performance Measurement Report

**Part II – Performance Measures**

<b>Performance Measure</b>	<b>FY 2008</b>	<b>FY 2009</b>	<b>*FY 2010</b>	<b>FY 2011</b>	<b>2012 Benchmark</b>	<b>2012 Actual</b>	<b>2013 Benchmark</b>
Number of People Served by the General Public Museum Programs	11,022	11,054	8,937	9,821	10,312	13,365 27% increase	Equal 2012
Grant/Contract Revenue Received	\$14,823	\$10,098	\$208,736	\$675,128	\$708,884	\$619,348	Increase by 5%
Number of Exhibitions Developed	1	5	0	20	20	7**	20
Museum Store Revenue Received	\$22,912	\$24,588	\$12,707	\$5,315	\$5,846	\$10,179 48% increase	Increase by 5%
Number of Educational Programs	84	168	100	103	108	184	Increase by 5%

**\*All of the Performance Measures were impacted by the Museum gallery and store closing in December 2009 for ADA required construction. We created new exhibits and displays for Fall 2010. Benchmarks related to the Museum gallery and store were based on a return to FY 2009 levels.**

**\*\*Transition from small exhibits to major exhibits.**

**Performance Measure Explanatory Notes:**

The Idaho Museum of Natural History went through significant changes during 2009 – 2010. These changes included the loss of staff due to retirement, reduction in force driven by deep cuts in funding, restructuring of core museum programs, and finding other employment. Staff numbers were decreased from 13 to 9 (six with full time appointments, three ranging from .15 to .6 appointments. These reductions in an already small staff impacted the number of programs offered.

The challenging economic climate and gallery remodeling affected the numbers of K12 school groups visiting the museum and numbers of children registered in K12 programs offered through the museum. One continuing program will be offering Museum learning experiences; both outreach and in gallery, to the 21<sup>st</sup> Century Afterschool program children through School District #25. This project works with 250 children at six different schools every month throughout the school year

Museum activity for the next one - two years will be focused on the development of strong collections areas, the development of rigorous research performed by IMNH curators, and the delivery of knowledge to Idaho's learning communities in the form of new exhibits, although because of budget reductions, we no longer have any staff dedicated to exhibits. Critical to our future is the creation of the Virtual Museum of Idaho, so that students, public, and researchers may use our collections from anywhere in the world.

**For More Information Contact**

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## ***Part 1 – Agency Profile***

### **Agency Overview**

The Idaho Small Business Development Center (Idaho SBDC) was established in 1986 as a partnership between the U.S. Small Business Administration and Boise State University. The Idaho SBDC provides business consulting and training to Idaho's small businesses and entrepreneurs under a federal grant matched by state funds. The purpose of the Idaho SBDC is to encourage and assist the development and growth of small businesses in the state by leveraging higher education resources. Nationally, as in Idaho, over 90% of new jobs are being created by the small business sector.

The Idaho SBDC is a network of business consultants and trainers that operates from the state's colleges and universities. Boise State University's College of Business and Economics serves as the State Office 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 with the host institutions from 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

### **Core Functions/Idaho Code**

The Idaho Small Business Development Center has two basic functions—consulting and training.

First, the Idaho SBDC provides direct one-on-one confidential business consulting to small business owners and entrepreneurs. Primary consulting is accomplished with a small core staff of professionals. Most of the professional staff has advanced degrees and five years or more of small business ownership/management experience. Business counseling is designed to provide in-depth business assistance in areas such as marketing, finance, management, production and overall business planning. The Idaho SBDC allocates sufficient resources to positively impact the individual small business' operation, a goal currently defined as 8.5 hours per consulting case. Faculty and students at each institution expand the Center's knowledge and resource base and provide direct assistance in appropriate cases. Senior undergraduate and graduate students complete work for Idaho SBDC business consultants. The students are provided the opportunity, under the direction of professional staff and faculty, to apply classroom learning in real-world situations. 'Real-world' laboratory experience for our college and university faculty and students provides long-term benefits to the business community and helps the academic institutions remain current on needs, problems, and opportunities of Idaho's business sector.

The Idaho SBDC also provides low-cost, non-credit training to improve business skills. Workshops, primarily directed at business owners, are typically 3 – 4 hours in length and attended by 15 – 20 participants. Training covers topics such as marketing, accounting, management, finance, etc. A variety of faculty, staff and private sector experts are used to ensure timely, useful material are presented by a subject-matter expert. Significant private sector contributions are made in support of Idaho SBDC workshops including registration fees, and donations for marketing, instructor fees and travel. A standard training format allows the Idaho SBDC to provide consistent, cost-effective training throughout the state.



**Special Programs—Small Business Development Centers**

Performance Measurement Report

**Revenue and Expenditures:**

<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Revenue	\$304,700	\$255,800	\$246,300	\$236,100
<b>Total</b>	<b>\$304,700</b>	<b>\$255,800</b>	<b>\$246,300</b>	<b>\$236,100</b>
<b>Expenditure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	\$60,845	\$42,633	\$49,451	\$43,108
Operating Expenditures	\$243,855*	\$213,167*	\$196,849*	\$192,992
Capital Outlay	0	0	0	0
Trustee/Benefit Payments	0	0	0	0
<b>Total</b>	<b>\$304,700</b>	<b>\$255,800</b>	<b>\$246,300</b>	<b>\$236,100</b>

\* 96% of this is subcontracts which are 100% personnel.

**Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Number of Small Businesses Receiving Consulting	1,754	1,858	1,721	1,508
Average Hours of Consulting Per Client	9.3	9.4	9.3	11.1
Number of Small Businesses Trained	3,850	2,624	3,834	3,570
Number of Consulting Hours (annual)	16,356	17,400	16,013	16,687

**Performance Highlights:**

1. The average hours per client are one of the highest in the nation. This is one of the major factors that contribute to economic impact and growth by small businesses.
2. In the most recent SBA report on SBDC effectiveness and efficiency (June 2008), the Idaho SBDC was in the top 10% of SBDCs nationwide in all effectiveness and efficiency measures. The Center provides services at a low cost and helps businesses create significant economic growth.
3. Dr. Jim Chrisman, Mississippi State University, conducts an independent impact survey of all SBDCs in the country. According to Dr. Chrisman, the Idaho SBDC is and has been one of the top five performing SBDCs over the past 10 years.

**Part II – Performance Measures**

<b>Performance Measure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>	<b>Benchmark</b>
Average Sales Growth of SBDC Clients as a Percent of Sales Growth of All Idaho Small Business Sales Growth <sup>1</sup>	745%	800%	470%	290%	300%
Capital raised by clients	\$41,686,819	\$6,500,863	\$13,701,212	\$7,471,238	\$25,000,000
Total SBDC Client Employment Growth/Jobs Saved <sup>2</sup>	1,175	927	1,105	1,018	750
ROI (Return on Investment) - Additional Taxes Paid/Total Cost of the Idaho SBDC Program <sup>4</sup>	5.13	1.77	3.0	2.2	3.0



**Special Programs—Small Business Development Centers**

Performance Measurement Report

Sales Increase of SBDC Clients over An Average Idaho Business	\$107,429,279	\$11,543,008	\$50,073,210	\$33,845,250	\$25,000,000
New Business Started <sup>3</sup>	59	89	70	53	72
Customer Satisfaction Rate (1-5)	4.27	4.28	4.33	4.57	3.75

**Performance Measure Explanatory Notes:**

The last year was a tough year for all businesses in Idaho. The impacts for SBDC clients were similar to the previous year. It is our sense that businesses are not adding employees due to uncertainty in the marketplace. Raising capital continues to be an issue for Idaho entrepreneurs. SBDC clients continued to outperform the average business in Idaho. The following are some highlights:

1. Sales—SBDC client sales were up 11.3% versus 3.9% for the average business.
2. Employment—SBDC clients grew employment by 9.8% versus 0.5% for the average business in Idaho.
3. It is still a challenge for most entrepreneurs to get bank financing to start a business.
4. Taxes paid due to growth by SBDC clients were 2.2 times the overall cost of the Idaho SBDC.

**For More Information Contact**

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## Special Programs—Tech Help

Performance Measurement Report

### Part 1 – Agency Profile

#### Agency Overview

In 1993, the Idaho Department of Commerce convened 45 representatives of economic development groups who supported the manufacturing extension center concept. In 1994, the Governor and ten key economic development entities pledged support for manufacturing extension by signing Idaho's Technology Partnership Agreement. Approval to establish "TechHelp" within the National Institute of Standards and Technology (NIST) Manufacturing Extension Partnership (MEP) was granted in late 1995. In 1996, TechHelp was established at Boise State University and the first director and field engineer were appointed.

Today, TechHelp is a partnership of Idaho's three state universities and an affiliate of the NIST/MEP system. It is also Idaho's Economic Development Administration University Center, targeting economically distressed areas of Idaho. TechHelp specialists have access to cutting-edge knowledge through links to local universities and to a national network of over 1300 manufacturing specialists through the MEP system.

TechHelp's six manufacturing specialists operate out of offices in Boise, Post Falls, and Pocatello. TechHelp's primary mission is to provide technical assistance, training, and information to strengthen the competitiveness of Idaho manufacturers through product and process innovation. TechHelp provides internships to students at the College of Engineering's New Product Development (NPD) Lab at Boise State University. Internships give university students the opportunity to gain real world experience with innovative Idaho companies and expose Idaho companies to talented young professionals looking to enter the state's workforce.

#### TechHelp Advisory Board

TechHelp's Executive Director reports to the Dean of the BSU College of Business & Economics and takes advisement from an Advisory Board made up of representatives from private industry, education, and government. TechHelp Board bylaws state that a full board consists of 9 - 11 members; at least seven of whom are from manufacturing and two from the public sector. The Director appoints non-voting members with approval of the Board.

#### TechHelp Partners

TechHelp works with state and federal partners, listed below, to meet its mission of assisting Idaho manufacturers. TechHelp also works with local groups such as chambers of commerce and economic development organizations to stay abreast of community development issues and meet the needs of Idaho companies.

Partnership	Center Role	Required/Desired of Center
U.S. Manufacturing Extension Partnership	MEP Center	Assist manufacturers in Idaho to be more competitive
U.S. Economic Development Administration	EDA University Center	Serve manufacturers in remote/distressed areas of Idaho
State of Idaho	Economic Development	Serve manufacturers in Idaho Participate in implementation of Science & Technology Plan with product development service
Idaho State Universities	Contracted Partner (outreach program for economic development)	Build University reputation through professional development activity, training and internships
Idaho SBDC	Informal Partnership	Cross-referrals and delivery of services



## Special Programs—Tech Help

Performance Measurement Report

Idaho Department of Commerce	Idaho District Export Council	Collaborate with Idaho District Export Council on ExportTech and Export University. Cross-referrals of small manufacturers needing product and process services
Idaho Department of Labor	Workforce Development Training	Provide Idaho workers with training in advanced manufacturing skills
Idaho Department of Agriculture	Specialty Crop Grant Program	Cross-referrals and delivery of services
Idaho Department of Environmental Quality	Informal Partnership	Cross-referrals and delivery of services; collaborate on E3 projects

### Core Functions/Idaho Code

TechHelp helps Idaho manufacturers primarily through one-on-one contact with companies. This contact ranges from major collaborative projects, which usually address a fundamental challenge facing the company, to smaller "value-added" projects, which typically bring a specific improvement to some aspect of company operations. TechHelp also hosts workshops and seminars statewide focusing on topics that impact Idaho manufacturers.

TechHelp's team of experts provides personalized solutions in the following areas of manufacturing.

- **New Product Development**
  - Eureka! Winning Ways Growth Services
  - Product Design
  - Prototyping & Testing
  - Design for Manufacturability
- **Quality Systems**
  - ISO 9000
  - Six Sigma Belt Certification
  - Statistical Process Control
  - Food Safety
- **Process Improvements**
  - Lean Manufacturing
  - Lean Enterprise Certificate Program
  - Lean Manufacturing for the Food Industry
  - Lean Office
  - Lean Enterprise
  - E3

### Revenue and Expenditures

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
General Fund	\$174,300	\$159,200	\$143,900	\$137,900
<b>Total</b>	<b>\$174,300</b>	<b>\$159,200</b>	<b>\$143,900</b>	<b>\$137,900</b>
Expenditure	FY 2009	FY 2010	FY2011	FY 2012
Personnel Costs	\$0	\$0	\$0	\$0
Operating Expenditures	\$0	\$0	\$0	\$0
Capital Outlay	\$0	\$0	\$0	\$0
Trustee/Benefit Payments	\$174,300	\$159,200	\$143,900	\$137,900
<b>Total</b>	<b>\$174,300</b>	<b>\$159,200</b>	<b>\$143,900</b>	<b>\$137,900</b>

### Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
Average State Cost Per Client Served	\$1,069	\$1,162	\$1,050	\$770
Manufacturers Served	163	137	137	179



## Special Programs—Tech Help

Performance Measurement Report

### Performance Highlights:

- Despite the economic downturn, TechHelp's clients reported significant improvements in employment, sales and investments.
- TechHelp continued to maintain perfect quarterly performance ratings of 100 from the U.S. Department of Commerce.
- In addition to being a partnership of the three state universities, TechHelp partnered with several other state agencies - Department of Commerce, Department of Labor, Department of Agriculture, Department of Environmental Quality, Idaho District Export Council, and Small Business Development Centers – to provide integrated and effective services to Idaho's manufacturing community.
- TechHelp conducted 25 workshops during the year that trained 622 attendees in lean manufacturing, food safety, and food processing.
- TechHelp staff and BSU student interns conducted 73 product design and prototyping projects in the BSU College of Engineering's Rapid Prototyping Laboratory for Idaho companies.
- TechHelp developed strategies and tactics to continue the roll out of its E3 program in Idaho as well as to launch its Growth and Innovation I. TechHelp's E3 program provides coordinated technical assistance to help businesses thrive in an era of intense global competition. E3 starts with an assessment of potential Energy, Waste and Efficiency savings followed by a plan for realizing those savings.

### Part II – Performance Measures

Performance Measure	2008	2009	2010	2011	2012	Benchmark
Number of Jobs Created or Retained	379	799	261	276	335	Exceed prior year by 5%
Customer Satisfaction Score (scale of 1-5)	4.37*	4.45*	4.65*	4.63*	4.76*	Exceed 4.0
New and Retained Client Sales	\$33.5M	\$39.5M	\$19.0M	\$44.6M	\$53.4M	Exceed prior year by 5%
Client Cost Savings	\$7.0M	\$17.3M	\$8.3M	\$3.25M	\$10.6M	Exceed prior year by 5%
Client Investments in Improvement	\$5.5M	\$8.1M	\$5.7M	\$6M	\$6.6M	Exceed prior year by 5%
Federal Minimum Acceptable Impact Measures Performance Score	100	100	100	100	100	Exceed 85 of 100
Bottom-line Client Impact: Ratio of National Median**	1.19	1.73	1.00	.85	n/a**	Above national median of 1.0
Net Revenue from Client Projects	\$474K	\$392K	\$572	\$403K	\$367K	Exceed prior year by 5%
Grant Dollars for Operations & Projects	\$873K	\$694K	\$689K	\$699K	\$658K	Exceed prior year by 5%

### Performance Measure Explanatory Notes:

\* The survey instrument for Customer Satisfaction Score was changed in FY 2008.

\*\* Bottom-line Client Impact was eliminated in 2012 from the survey instrument in favor of the raw sales, savings, investment and jobs measures listed previously.



## Special Programs—Tech Help

Performance Measurement Report

### For More Information Contact

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University of Idaho – WWAMI Medical Education Performance Measurement Report 2012

## **Part 1 – Agency Profile**

### **Agency Overview**

The **Idaho WWAMI Medical Education Program** provides Idaho medical students with the opportunity to complete three of four years of medical school in Idaho, thereby developing their familiarity with the healthcare needs of the State and region and increasing the likelihood that they will return to Idaho communities to practice medicine. Twenty Idaho students complete their first year of medical training through the University of Washington School of Medicine's regional program at the University of Idaho's (UI) Moscow campus, sharing resources and faculty with the joint program at Washington State University in Pullman. After completing their second year of training in Seattle, WWAMI students have the opportunity to return and complete their 3<sup>rd</sup> and 4<sup>th</sup> year clinical training requirements in Idaho. These clinical rotations are coordinated through the Idaho WWAMI Medical Education Program office in Boise.

The first year WWAMI Program at UI is directed by Andrew Turner, PhD, who reports to the Provost at UI, and also functions as an Assistant Dean of the University of Washington School of Medicine. The WWAMI Medical Education Program office in Boise is directed by Mary Barinaga, MD, who reports to the Vice Dean for Regional Affairs at the University of Washington School of Medicine, and also functions as an Assistant Dean in Idaho. The WWAMI Program at UI employs twelve part-time faculty (shared with other academic programs) and two administrative staff. Idaho students admitted to the WWAMI Medical Program are interviewed and selected by the Idaho Admissions Committee, a group of four Idaho physicians appointed by the Idaho State Board of Education, who work in cooperation with the University of Washington School of Medicine Admissions Committee.

The Idaho WWAMI Medical Education Program is committed to helping prepare physicians for medical practice in Idaho, regardless of eventual sub-specialty selection, and to increasing the number of physicians who choose to practice in rural or underserved areas. There is also a strong commitment to the partnership between excellence in research and teaching in medical education. On average, WWAMI faculty in Idaho bring in \$5 Million each year in biomedical research awards. Cutting-edge research prepares the next generation of doctors to be well informed and at the forefront of clinical medical practice. The WWAMI faculty at the University of Idaho and our clinical/research faculty in Boise, Pocatello, Caldwell, Coeur d'Alene, Idaho Falls, McCall, Sandpoint, Hailey, and other rural training communities are committed to being dynamic teachers and informed biomedical scholars.

In addition, our WWAMI program goals include the continued development of humanitarian and service interests of our medical students, and recruitment from groups within Idaho that are traditionally underrepresented in medical school populations. WWAMI has established outreach programs to high schools and community colleges to encourage and prepare talented Idaho students from rural, underprivileged, or minority backgrounds who have an interest in medicine and health careers. In May 2012, Idaho WWAMI hosted the Fifth Idaho Pre-Med Summit, in Nampa, on the campus of Northwest Nazarene University. Seventy-eight pre-health and pre-medical undergraduate students and advisors from Idaho colleges and universities participated in this advising and recruitment meeting.

### **Core Functions/Idaho Code**

The core function of the Idaho WWAMI Medical Education Program at the University of Idaho is to provide qualified Idaho residents with access to and education in medical training as part of the Idaho State Board of Education's contract with the University of Washington School of Medicine. Idaho Code **§33-3720** authorizes the State Board of Education to enter into contractual agreements to provide access for Idaho residents to qualified professional studies programs, and specifically, the WWAMI Medical Education Program (33-3717B(7)).



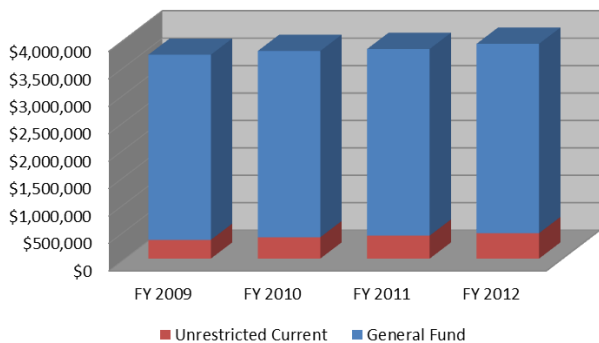
**University of Idaho – WWAMI Medical Education Performance Measurement Report 2012**

**WWAMI**

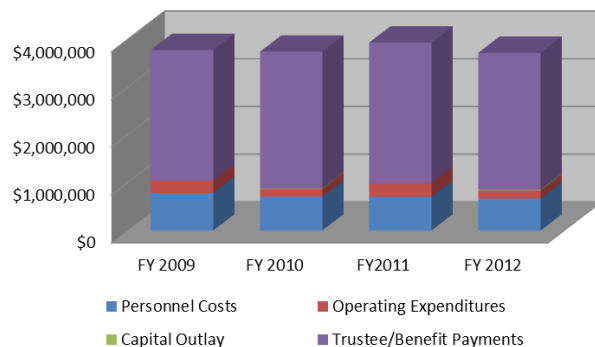
**Revenue and Expenditures:**

<b>Beginning Fund Balance</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
	\$ 373,289	\$ 305,684	\$ 344,314	\$ 230,973
<b>Revenue</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
General Fund	\$ 3,375,100	\$ 3,395,500	\$ 3,402,400	\$ 3,451,600
Unrestricted Current	341,146	388,874	418,449	463,763
<b>Total</b>	<b>\$ 3,716,246</b>	<b>\$ 3,784,374</b>	<b>\$ 3,820,849</b>	<b>\$ 3,915,363</b>
<b>Expenditure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Personnel Costs	\$ 787,956	\$ 711,639	\$ 706,452	\$ 667,856
Operating Expenditures	254,482	157,319	290,169	168,530
Capital Outlay	774	12,626		18,150
Trustee/Benefit Payments	2,740,639	2,864,160	2,939,741	2,866,599
<b>Total</b>	<b>\$ 3,783,851</b>	<b>\$ 3,745,744</b>	<b>\$ 3,936,362</b>	<b>\$ 3,721,135</b>
<b>Ending Fund Balance</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
	\$ 305,684	\$ 344,314	\$ 228,801	\$ 425,201

**Revenue**



**Expenditures**



**Profile of Cases Managed and/or Key Services Provided**

<b>Cases Managed and/or Key Services Provided</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>
Number of Idaho Students Applying to UW Medical School (WWAMI)	134	114	129	149
- Average GPA ID WWAMI	3.8	3.8	3.8	3.7
- Average MCAT Score ID WWAMI	10.2	9.9	9.5	10.2
Number of Idaho Students Admitted to UW Medical School	20	20	20	20
Number/Percentage of Graduates Practicing in Idaho (cumulative)	224/50%	242/49%	248/50%	254/49%



## University of Idaho – WWAMI Medical Education Performance Measurement Report 2012

### **Performance Highlights:**

1. In 2011-2012, 40 WWAMI students completed their entire year of medical training in Idaho. In addition to the 20 first year medical students in the UI WWAMI program in Moscow, 9 third year medical students and 11 fourth year medical students completed the Idaho WWAMI Track in Boise. Seventy-five additional WWAMI medical students completed one or more clinical training rotations in Idaho this past year, introducing them to Idaho's healthcare system and future workforce needs.
2. Idaho WWAMI continues to maintain high levels of interest in rural and underserved medicine and rural training experiences. In 2012, we placed 20 first year medical students in one-month rural primary care training experiences throughout Idaho during the summer between their first and second years of medical school. In addition, 2 of these students participated in joint Idaho SEARCH Program placements, a rural workforce program grant within the Idaho Office of Rural Health and Primary Care.
3. Five of the thirteen newly-elected members of the UWSOM chapter of Alpha Omega Alpha, the national honor society for medicine, were Idaho WWAMI medical students this year. By national guidelines, these students must be in the top twenty-five percent of the class to be eligible for election, and must show evidence of personal and professional development as a physician-in-training, integrity, compassion, fairness in dealing with one's colleagues, and capacity for leadership. Idaho WWAMI students Camille Asher (Boise), Kelly Haisley (Hailey), Lucas Marchand (Pocatello), Spencer Miller (Boise) and Hannah Qualls (Moscow) are our Idaho medical student honorees.
4. In January of 2012, for the third time since the WWAMI program began in Idaho, the Idaho Admissions Committee conducted admissions interviews in Idaho. The interviews took place over a four-day period at the University of Idaho Boise Center, where our four Idaho physician admission committee members interviewed 43 of the 149 Idaho WWAMI applicants. A second week of interviews was conducted in Seattle for the remaining 36 interviewees who had asked to interview on the UW Medicine campus. Idaho WWAMI admission interviews in Boise are now a permanent part of the WWAMI admission process for Idaho students.
5. WWAMI-affiliated faculty at UI continue to be highly successful in bringing National Institute of Health biomedical research funding into Idaho. The Idaho INBRE Program, now in its fourth year of a five year, \$16.6 Million NIH award to build Idaho's biomedical research infrastructure, continues to expand research capacity at all nine of Idaho's universities and colleges and the Boise VA, through shared faculty funding and student research training support. In addition, WWAMI faculty earned \$4 Million in new funding from NIH, to advance biomedical research in infectious and genetic diseases.



**University of Idaho – WWAMI Medical Education Performance Measurement Report 2012**

***Part II – Performance Measures***

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012	Benchmark
Number of Idaho Applicants Per Year; Ratio of State Applicants Per Seat	134 6.7 : 1	114 5.7 : 1	129 6.5 : 1	149 7.5 : 1	2.2 : 1 <sup>1</sup>
Idaho WWAMI Pass Rate on the U.S. Medical Licensing Examination	100%	100%	100%	100%	91% <sup>2</sup>
Number of Idaho Rural Summer Medical Student Placements Per Year	23	20	18	20	10 <sup>3</sup>
Cumulative Idaho WWAMI return rate for graduates who practice medicine in Idaho (Idaho WWAMI graduates practicing in state/number of Idaho WWAMI graduates)	50%	49%	50%	49%	39% <sup>4</sup>
Overall Idaho return on investment (ROI) for WWAMI graduates (five states) who practice medicine in Idaho (all WWAMI graduates practicing in Idaho/number of Idaho WWAMI graduates)	72%	72%	73%	72%	>60%
Percentage of Idaho WWAMI graduates choosing primary care specialties for residency training	43%	35%	39%	53%	50% <sup>5</sup>

**For More Information Contact**

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1. This is the national ratio of in-state applicants per admitted students (2010)
2. U.S. Pass Rate
3. The target is 50% interest in rural training experiences
4. This is the national return rate for all medical schools in the U.S.
5. This target rate is per WWAMI mission



## University of Idaho–WI Veterinary Medicine Performance Measurement Report

### **Part I – Agency Profile**

#### **Agency Overview**

The W-I (Washington-Idaho) Veterinary Medicine Program is administered in Idaho by the Head of the Department of Animal and Veterinary Science, College of Agricultural and Life Sciences, University of Idaho. Originally established in 1974, the W-I Program annually provides 44 Idaho residents with access to veterinary medical education through a cooperative agreement between the University of Idaho and Washington State University. The Doctor of Veterinary Medicine (DVM) degree is awarded to Idaho students by Washington State University College of Veterinary Medicine. Idaho provides the cooperative program with the majority of veterinary students who have an expressed interest in production agriculture animals.

#### **Core Functions/Idaho Code**

The University of Idaho provides educational opportunities for any senior student in the Washington State University College of Veterinary Medicine by offering the equivalent of 65, one-month teaching rotations in food animal production and clinical medicine at the Caine Veterinary Teaching Center (CVTC, Caine Center) in Caldwell. Faculty members at the Caine Center continuously interact with Idaho veterinarians and livestock producers providing education and recommendations concerning animal production, diagnosis, and clinical evaluation of disease situations.

1. Provide access to veterinary medical education at WSU for Idaho residents – the current W-I contract reserves 11 new seats per year for Idaho veterinary medicine students. A total of 44 Idaho students are enrolled in this program each year.
2. Assist Idaho in meeting its needs for veterinarians – provide Idaho-trained, Idaho-resident graduate veterinarians to meet annual employment demands for the State. On average, 65-75% of new Idaho resident graduates of the W-I Program are licensed to practice veterinary medicine in Idaho annually.
3. Provide hands-on instruction opportunities for senior veterinary students –teaching rotations in food animal production medicine and clinical experience are offered year-round at the Caine Center in Caldwell.
4. Provide access to referrals from Idaho veterinarians in the areas of food animal production, diagnosis, and clinical evaluation of diseases – a) accept 400 to 500 hospital clinical referrals annually as student teaching cases; b) provide disease diagnostic testing on approximately 15,000 diagnostic samples annually, and; c) conduct on-farm disease investigations for herd problems as requested by Idaho veterinarians and livestock producers.

### **Washington-Idaho Veterinary Medicine Program**

#### **Revenue and Expenditures:**

Revenue	FY 2009	FY 2010	FY 2011	FY 2012
General Fund	\$ 1,870,700	\$ 1,828,900	\$ 1,822,500	\$ 1,811,300
<b>Total</b>	<b>\$ 1,870,700</b>	<b>\$ 1,828,900</b>	<b>\$ 1,822,500</b>	<b>\$ 1,811,300</b>
Expenditure	FY 2009	FY 2010	FY 2011	FY 2012
Personnel Costs	\$ 555,400	\$ 528,000	\$ 519,100	\$ 500,000
Operating Expenditures	1,215,300	1,200,900	1,203,400	1,211,300
Capital Outlay	0	0	0	0
Trustee/Benefit Payments	100,000	100,000	100,000	100,000
<b>Total</b>	<b>\$ 1,870,700</b>	<b>\$ 1,828,900</b>	<b>\$ 1,822,500</b>	<b>\$ 1,811,300</b>



University of Idaho–WI Veterinary Medicine Performance Measurement Report

**Profile of Cases Managed and/or Key Services Provided**

Cases Managed and/or Key Services Provided	FY 2009	FY 2010	FY 2011	FY 2012
Number of Idaho Resident Students Enrolled Each Year	44	44	44	44
Number of One-Month Student Rotations (or equivalent) offered at the Caine Center Per Year	65	65	65	65
Number of Accepted Clinical Hospital Referral Cases	462	398	418	179
Number of Accepted Veterinary Diagnostic Samples	25,330	22,093	18,341	15,245

**Performance Highlights:**

**1) Teaching and learning at the Caine Center includes a variety of clinical experiences.** Faculty instruct 4th-year veterinary students in hands-on production animal/food animal medicine and management activities in a variety of settings including hospital in/out-patient clinical care, field call services, disease investigations as well as limited formal presentations by Faculty. Several enhancements were made to selected rotations this year, including:

- Small Ruminant rotation now includes veterinary health checks at several fairs in SW Idaho allowing students to participant in the client/exhibitor/veterinarian interactions in a situation that mimics an office/farm call for a production animal; students also work with a large, commercial sheep producer to participate in the operation's daily animal activities;
- Lambing rotation has students assigned to a 3,000-head lambing operation to participate in lambing assists, lamb processing, fracture and prolapsed repairs, C-sections, etc.;
- Beef Calving rotation includes activities such as delivery assists and treating newborn calves;
- Feedlot rotation includes spending time in feed mill operations and working with feedlot nutritionists;
- Cow-Calf rotation students participate in cattle handling activities at the Nancy M. Cummings Research, Extension and Education Center (NMCREEC) near Salmon, ID such as calving, breeding soundness exams, and Trich-testing bulls, reproductive tract scoring and pelvic measuring heifers, practice low-stress animal handling, ultrasound pregnancy exam of cows and heifers, vaccinate weaned heifers, and feed-test stored feeds.

**2) FY2012 Grants and Contracts include \$58,300 in funding for the 5th year of the Northwest Bovine Veterinary Experience Program (NW-BVEP).** The primary objective of this program is to use an aggressive mentoring program to increase the number of food supply veterinarians graduating from veterinary school and practicing in Idaho. Funding supports stipends for 15 students participating in the program during the summer 2012, bringing the total number of student participants over the five years of the program to 64.

**3) FY2012 Grants/Contracts also include \$100,000 for a cooperative project with the Idaho Department of Fish and Game entitled Etiology and Epidemiology of pneumonia in bighorn sheep, now in its 7th year.** Topics of investigation under this project umbrella include Pasteurella and Mycoplasma species. Five manuscripts related to this research were accepted for publication this year – three have been published and two are in press.

**4) During FY 2012, the Faculty at the Caine Center continued efforts in applied research, in conjunction with the veterinary teaching and outreach activities.**

- A vaccine project is being conducted at the Nancy M. Cummings REEC near Salmon, ID to evaluate the potential of a vaccine for scours control. This is a 3- to 5-year study funded by Pfizer Animal Health.
- Three manuscripts were published this year related to Scrapie sheep research conducted in collaboration with Dr. Richard Rubenstein, et al. A flock of Scrapie-positive sheep is still being maintained at the Caine Center. Tissues from these animals are utilized in ongoing research.



## University of Idaho–W-I Veterinary Medicine Performance Measurement Report

- Research continues in the management of Johne's disease in sheep and goats, and has allowed for student interaction with several cooperative flocks and herds. Activities include: ultrasound pregnancy examination of yearling goats, collection of samples, and on-farm assistance with goat kidding.
- Three abstract- and poster-presentations were presented by one faculty member and a graduate student to an international audience of veterinarians and veterinary research scientists at the "World Buiatrics Congress 2012", June 2012, in Lisbon, Portugal.
- The laboratory services program at the Caine Center includes a new contract with a private company that is developing a test to identify prions in animal tissues.

### **Part II – Performance Measures**

<b>Performance Measure</b>	<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>	<b>Benchmark</b>
1. Senior Veterinary Students Selecting Elective Rotations at the Caine Center.	62	80	54	71	40
2. Number/Percentage of Idaho Resident New Graduates Licensed to Practice Veterinary Medicine in Idaho.	4 Students (36%)	7 Students (64%)	7 Students (64%)	6 Students (56%)	7 students (65%)
3. Number of Disease Investigations Conducted by W-I Faculty Members.	193	228	279	210	150
4. Number/Dollar Amount of Grants/Contracts by W-I Faculty Members.	10 / \$240,273	10 / \$303,350	9 / \$358,651	8 / \$242,476	7 / \$300,000

#### **Performance Measure Notes:**

Rotations offered at the Caine Veterinary Teaching Center continue to be very popular with senior veterinary students and receive consistently high student evaluations. Demand for diagnostic services and field service activities also remains constant.

The loss of one faculty position (due to retirement) at the beginning of FY2011 resulted in the remaining faculty having to handle a much heavier teaching and service/outreach load since that time to try and maintain those resources. In April 2012 a temporary Veterinary Medical Associate was hired to assist with the teaching program, which has provided some relief in that regard.

A search was initiated in May 2012 to hire a Director and Veterinary Scientist who will provide leadership for the Caine Center and administrative structure for the W-I Veterinary Medicine Program. We anticipate a new hire to be made in that position sometime this fall.

#### **For More Information Contact**

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**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
**OCTOBER 17, 2012**

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**SUBJECT**

Idaho Higher Education Research Strategic Plan Performance Measure Report

**REFERENCE**

December 2011

Board approved Higher Education Research Strategic Plan.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section I.M, and Section III.W.

**BACKGROUND/DISCUSSION**

Board Policy III.W., Higher Education Research, assigns the responsibility of developing the statewide strategic plan for research to the Board's Higher Education Research Council (HERC). At the December 2011 Board meeting the Board approved was presented with and approved the statewide higher education research strategic plan. The performance measures from the strategic plan are presented to the Board in Attachment 1. The performance measure report, reports data for the fiscal year just ended (FY12) and the previous three years. This is the first year these measures have been reported as a result during the data collection process it was discovered that some data points were not available for previous years or did not adequately measure progress toward the plan goals.

**IMPACT**

The data included in this presentation will be used by the Board and HERC to direct their future strategic planning efforts in regards to higher education research and the public postsecondary institutions..

**ATTACHMENTS**

Attachment 1 – Performance Measure Report

Page 3

Attachment 2 – Higher Education Research Strategic Plan

Page 5

**STAFF COMMENTS AND RECOMMENDATIONS**

HERC reviewed the performance measure report for the research strategic plan at their annual retreat on October 8<sup>th</sup>, 2012. Based on the data collected and input from the institutions it was determined that the performance measures used for this first performance measure report were in some instances not available or did not necessarily indicate progress towards the plans goals. The research strategic plan is scheduled to be updated, and come back to the Board for approval, at the December 2012 Board meeting, HERC will be reevaluating the performance measures and establishing statewide benchmarks for new measures that will be presented in the updated strategic plan at the Boards December Board meeting.



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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**BOARD ACTION**

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



**PLANNING, POLICY, AND GOVERNMENTAL AFFAIRS**  
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**Higher Education Research Strategic Plan**  
**Performance Measure Report**  
(University of Idaho, Boise State University, Idaho State University)

Performance Measure	FY 2009	FY 2010	FY 2011	FY 2012
Amount of ongoing state funding received annually at each of the universities to support CAES activities	\$1,603,100	\$1,752,943	\$1,741,582	\$1,709,538
Number of graduate degrees resulting from CAES-related activities each year	34	59	57	197
Annual expenditures derived from external funds on CAES activities	NA	NA	\$4,495,747	\$4,818,337
Number of collaborative, sponsored proposals submitted	18	19	16	75
Number of collaborative, sponsored projects awarded	14	12	13	53
Number of joint hires	0	0	0	0
Number of university/private sector facility use agreements (in both directions)	NA	NA	NA	49
Number of proposed sponsored projects with private sector	105	95	124	150
Number of awarded sponsored projects with private sector	97	128	105	92
Number of student internships	1,779	1,931	2,293	2,688
Number of faculty conducting research in external facilities	NA	NA	NA	99
Number of private sector personnel conducting research in residence at university facilities	NA	NA	NA	NA
Number of joint university/industry workshops	NA	NA	NA	NA
Number of technology transfer agreements	10	25	29	35



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Number of invention disclosures	39	39	57	55
Number of non-disclosure agreements	33	65	58	60
Number of patent filings	29	36	63	41
Number of issued patents	7	14	16	5
Amount of licensing revenues	\$404,772	\$203,201	\$289,798	\$478,891
Number of start-up companies	1	0	1	0
Number of jobs created by startup companies	2	0	8	0
Number of undergraduate students supported by sponsored projects	NA	NA	1,454	846
Number of graduate students supported by sponsored projects	NA	NA	1,040	1,610
Number of faculty and staff paid by sponsored projects	778	653	2,121	2,113
Number of peer-reviewed publications (students and faculty)	203	243	228	1,629
Number of theses and dissertations	409	446	490	487
Number of STEM events promoting research-related activities	NA	NA	NA	NA
Number of K-12 students involved in research presentations and instruction	NA	NA	NA	NA
Number of proposals targeted for research equipment, facilities, and services	18	17	20	16
Number of awards for research equipment, facilities, and services	8	14	6	8
Amount of space dedicated to research	1,186,019	695,954	879,867	963,253
Number of efficiencies identified	0	0	0	0
Number of efficiencies implemented	0	0	0	0



STATEWIDE STRATEGIC RESEARCH PLAN  
FOR IDAHO HIGHER EDUCATION  
(2012-2016)

Approved December 2011

**Richard Jacobsen**

Executive Director of Research and Technology Transfer  
(Interim Vice President for Research)  
Idaho State University

**John K. McIver**

Vice President for Research and Economic Development  
University of Idaho

**Mark J. Rudin**

Vice President for Research  
Boise State University



## **EXECUTIVE SUMMARY**

Research is being increasingly acknowledged by industry, government and education as a key factor in the future economic vitality of Idaho. The universities and colleges of Idaho's system of higher education understand the need for greater collaboration in order to be competitive in today's global environment. The vice presidents of research also recognize the need to focus on and emphasize existing strengths and opportunities in Idaho's research community. They developed the following statewide strategic plan for research to ensure the greatest potential for achieving a vital and sustainable research base for Idaho. The strategic plan identifies the key research areas that will become the focal points for research and economic development through partnering among academia, industry, and government in both science and technology.

Research is fundamental to the mission of a university due to its role in knowledge discovery and in providing new ideas for technology commercialization via patents, copyright, licenses, and startup companies. University faculty who engage in research and creative activity are at the leading edge of their respective fields. Research also enhances the national reputation of the faculty and the universities. These faculty and their vibrant research programs attract the best graduate and undergraduate students by providing unique, cutting-edge learning experiences in their research laboratories, studios, field sites, and classrooms. On the most basic level, research strengthens a university's primary product -- innovative, well-educated students ready to enter a competitive workforce.

Research is the foundation of a university's economic development role. The influx of research dollars from external grants and contracts creates new jobs at the university, along with the attendant purchases of supplies, services, materials and equipment. The results of the research are new knowledge, new ideas, and new processes, which lead to patents, startup companies and more efficient businesses.

Idaho's research universities have strengths and opportunities for economic development in 1) Energy, 2) Natural Resource Utilization and Conservation, 3) Biosciences, 4) Novel Materials and 5) Software Development. By focusing collaborative efforts in these areas, the research universities will expand research success, public-private partnerships and the overall economic development of the State. Specifically, this collaboration:

- will increase the focus among Idaho universities and colleges on areas of strengths and opportunities;
- create research and development opportunities that build the relationship between the universities and the private sector;
- contribute to the economic development of the State of Idaho;
- enhance learning and professional development through research and scholarly activity; and
- build and improve the research infrastructure of the Idaho universities to meet current and future research needs.

This Statewide Strategic Research Plan for Idaho Higher Education is a tool for identifying and attaining quantifiable goals for research and economic growth and



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success in Idaho. The plan will be reviewed and updated annually as needed amid the fast-changing pace of research discovery.

**VISION**

Idaho's public universities will be a catalyst and engine to spur the creation of new knowledge, technologies, products and industries that lead to advances and opportunities for economic growth and enhance the quality of life of citizens of Idaho and the nation.

**MISSION**

The research mission for Idaho's universities is to develop a sustainable resource base by:

- identifying, recruiting and retaining top faculty with expertise in key research areas;
- building research infrastructure including facilities, instrumentation, connectivity and database systems to support an expanding statewide and national research platform;
- attracting top-tier students to Idaho universities at the undergraduate and graduate levels, and providing outstanding education and research opportunities that will prepare them to excel in future careers;
- raising awareness among state, national and international constituencies about the research excellence and capabilities of Idaho's universities by developing and implementing targeted outreach, programs and policies; and
- collaborating with external public, private, state, and national entities to further the shared research agenda for the state, thereby promoting economic and workforce development and addressing the needs and challenges of the state, region and nation.

**GOALS**

1. Goal - Increase research collaboration among Idaho universities and colleges to advance the areas of research strengths and opportunities.
  - a. Objective – Ensure the growth and sustainability of the Center for Advanced Energy Studies (CAES).
    - i. PM – Amount of ongoing state funding received annually at each of the universities to support CAES activities.
    - ii. PM – Number of graduate degrees resulting from CAES-related activities each year.
    - iii. PM – Annual expenditures derived from external funds on CAES activities.
  - b. Objective – Expand joint research ventures among the state universities, including EPSCoR and Institutional Development Award (IDeA) related programs.
    - i. PM – Number of collaborative, sponsored proposals submitted.



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- ii. PM – Number of collaborative, sponsored projects awarded.
  - c. Objective – Create joint and coordinated hires (faculty, staff, and graduate students) among the state universities.
    - PM – Number of joint hires.
- 2. Goal – Create research and development opportunities that strengthen the relationship between the state universities and the private sector.
  - a. Objective – Leverage facility use between the state universities and private sector.
    - PM – Number of university/private sector facility use agreements (in both directions).
  - b. Objective – Increase the number of sponsored research projects involving the private sector.
    - i. PM – Number of proposed sponsored projects with private sector.
    - ii. PM – Number of awarded sponsored projects with private sector.
  - c. Objective – Encourage the exchange of ideas between the universities and the private sector.
    - i. PM – Number of student internships.
    - ii. PM – Number of faculty conducting research in external facilities.
    - iii. PM – Number of private sector personnel conducting research in residence at university facilities.
    - iv. PM – Number of joint university/industry workshops.
- 3. Goal – Contribute to the economic development of the State of Idaho.
  - a. Objective – Increase the amount of university-generated intellectual property introduced into the marketplace.
    - i. PM – Number of technology transfer agreements.
    - ii. PM – Number of invention disclosures.
    - iii. PM – Number of non-disclosure agreements.
    - iv. PM – Number of patent filings.
    - v. PM – Number of issued patents.
    - vi. PM – Amount of licensing revenues
  - b. Objective – Increase the number of university start-up companies.
    - i. PM – Number of start-up companies
    - ii. PM – Number of jobs created by startup companies
- 4. Goal – Enhance learning and professional development through research and scholarly activity.
  - a. Objective – Increase the number of university and college students and staff involved in sponsored project activities.
    - i. PM – Number of undergraduate students supported by sponsored projects
    - ii. PM – Number of graduate students supported by sponsored projects
    - iii. PM – Number of faculty and staff involved in sponsored projects



- b. Objective – Increase the dissemination of research findings.
    - i. PM – Number of peer-reviewed publications (students and faculty).
    - ii. PM – Number of theses and dissertations.
  - c. Objective – Increase the number of K-12 students involved in STEM education.
    - i. PM – Number of STEM events promoting research-related activities.
    - ii. PM – Number of K-12 students involved in research presentations and instruction.
5. Goal – Enhance the research infrastructure of the Idaho universities to meet current and future research needs.
- a. Objective – Increase the infrastructure necessary to enhance research and collaboration.
    - i. PM – Number of proposals targeted for research equipment, facilities, and services.
    - ii. PM – Number of awards for research equipment, facilities, and services.
    - iii. PM – Amount of space dedicated to research
  - b. Objective – Coordinate and create efficiencies in university research administration across the state.
    - i. PM – Number of efficiencies identified.
    - ii. PM – Number of efficiencies implemented.

## **RESEARCH OPPORTUNITIES**

Idaho's research universities have developed statewide strengths in strategic research areas that have great potential to drive future economic growth and success. The criteria used to select these areas include: number of faculty and qualifications; peer-reviewed publications and impact; infrastructure (facilities, equipment, information technology, staff); external grant and contract funding; academic programs; student involvement; potential benefit to the State; and technology transfer activity, including patents, licenses, and startup companies. By *focusing* collective research efforts and resources in these areas, the universities will be on the most efficient and effective route to research success and state-wide economic development. These high impact areas include 1) Energy, 2) Natural Resource Utilization and Conservation, 3) Biosciences, 4) Novel Materials, and 5) Information Management and Software Development.

*Energy:* Energy is a critical driver of any economy. The projected increases in the population of the world and increases in the standard of living will produce severe strains on the ability to meet the demands of the next few decades. In addition, finite reserves of fossil fuels and pollution from their combustion requires that alternative sources of energy production be developed. The combination of natural resources in Idaho and presence of the Idaho National Laboratory makes energy a natural area of emphasis. Indeed, the three universities with research capabilities already have extensive research projects in this area. The Center for Advanced Energy Studies is an example of the significant investment the three universities and the Idaho National Laboratory have made to develop expertise in nuclear engineering and safety, biofuel production from dairy waste, geothermal exploration, carbon sequestration, energy



policy, and energy efficient structures. Intellectual property has already been generated from these products and is licensed. Further growth in these areas not only takes advantage of the strong base but strongly supports economic development through new markets for new product development

*Natural Resource Utilization and Conservation:* In the broad field of natural resource utilization and conservation, Idaho's universities have expertise in water resources, agriculture, forestry, recreation, and geophysics and geochemical detection and monitoring of groundwater pollutants. For example, university geologists, ecologists, and policy experts are collaborating on broad-ranging research projects that examine and predict the impact of climate change on Idaho's water resources. As water is essential to agriculture, recreation, the ecosystem, and human health, the universities have research strength in an area of tremendous societal and economic impact. Agriculture remains an important part of the economy of Idaho. Development of new plant varieties with improved resistance to disease and climate change remain an area of importance as does the development of new feeds for domestic fish production. The often competing demands for preservation and exploitation put on the environment require understanding of the various ecosystems in the state and region as well as societal and economic impacts of policy decisions. The future economic success of the state will rely on a deep understanding of these processes.

*Biosciences:* Idaho universities have established research programs in several areas of the biosciences. These include selected areas of cell signaling and bioinformatics. While these areas of expertise contribute to the basic understanding of processes in living systems, they are applied to a wide range of living systems—extending from humans through wild and domestic animals and fish to plants. Human health is an important element of these programs, with research occurring in cancer as well as genetic and pathogenic diseases. Research on non-human living systems involves animal disease, improving food production and methods for mitigating climate variability. These studies address many of the challenges facing humanity not just in Idaho but also in the nation and the world. Results can lead to new treatments for human diseases, increased food production and safety, and preservation of the natural environment.

*Novel Materials:* The global materials industry is worth an estimated \$550 billion, conservatively. Materials revolutionize our lives by offering advanced performance and new possibilities for design and usage. For example, the market for biocompatible materials has grown from a few to \$60 billion in the past decade. Market size is growing for materials in emerging areas such photonic materials, electronic and dielectric materials, functional coatings, and green materials. Materials research in Idaho is conducted by a wide range of scientists in diverse fields. Current materials researchers in Idaho cover a broad spectrum of specializations, including semiconductor device reliability, microelectronic packaging, shape memory alloys, DNA machinery, environmental degradation, materials for extreme environments, biomaterials and bio-machinery, materials characterization, and materials modeling. Nanoscale materials and devices, functional materials and their uses and materials for energy applications



are a focus of research throughout the state. These areas of research are highly synergistic with local industries and the Idaho National Laboratory (INL). Access to materials characterization equipment and processing laboratories has resulted in collaborations with small businesses and start-up companies.

*Information Management and Software Development:* Device control and information management are an essential part of 21<sup>st</sup> century life and, therefore, are an important part of educational requirements. For instance, large amounts of sensitive data are collected, processed, and stored electronically but must be accessed and moved in order to have any impact. In fact, many systems are computer controlled through networks. These include such things as the electric transmission grid and transportation in major cities. The universities are beginning to develop research expertise in software development and data management lifecycle design and operations and secure and dependable system design and operations. This area provides a significant area of opportunity for economic development in Idaho as well as for improving the global competitiveness of the United States. There are already a significant number of firms in Idaho whose interests are in software development for device control, information management and processing. In addition, many of the major research projects being undertaken in the region by various state and federal agencies as well as the universities require the handling of significant amounts of data in a secure and dependable fashion. Each university has some expertise in this area but not a critical mass. Currently, research funding in the universities from private and governmental sources is limited by the number of qualified personnel. In addition, within Idaho there is a high demand for graduates at all levels in computer science.

## **EXTERNAL FACTORS: IDAHO RESEARCH ADVANTAGES AND CHALLENGES**

### Research Advantages

*The Idaho National Laboratory (INL) and the Center for Advanced Energy Studies (CAES):* Idaho is fortunate to be home to the Idaho National Laboratory, one of only 20 national laboratories in the U.S. The INL's unique history and expertise in nuclear energy, environmental sciences and engineering, alternative forms of energy, and biological and geological sciences and related fields provides an excellent opportunity for research collaboration with Idaho's university faculty in the sciences, engineering, business and other fields.

CAES established at the request of the U.S. Department of Energy, is a public-private partnership that includes Idaho's research universities—Boise State University, Idaho State University, and the University of Idaho—and the Battelle Energy Alliance (BEA), which manages the INL. The CAES partners work together to create unique educational and research opportunities that blend the talents and capabilities of Idaho's universities and the INL. A 55,000 square-foot research facility in Idaho Falls supports the CAES energy mission with laboratory space and equipment for students, faculty, and INL staff in collaborative research projects. The State of Idaho invested \$3.2M in



direct support of the three Idaho research universities during FY09 and FY10. During these first two years, the CAES partners won \$24M in external support for CAES research that has contributed to both scientific advances and economic development in the state and region.

*Natural Resources:* Idaho's beautiful natural resources are well known to fishermen, hunters, skiers, and other outdoor enthusiasts. Through its rivers, forests, wildlife, geological formations, and rangelands, Idaho itself is a unique natural laboratory for geological, ecological, and forestry studies. Idaho is home to some of the largest tracts of remote wilderness in the lower 48 states. In addition, the proximity of Yellowstone National Park and the Great Salt Lake provide additional one of a kind opportunities for ecology and geology research.

*Intrastate Networks:* The existing networks within the state, including agricultural extension services and rural health networks, provide a foundation for collecting research data from across the state, and rapidly implementing new policies and practices as a result of research discoveries.

*Coordination Among Universities In Advancing Research and Economic Development (technology transfer):* By and large the research universities continue to coordinate and share their technology transfer and economic development activities. This not only increases each university's competitiveness at the national and state level but also decreases the costs for achieving a particular goal.

### Research Challenges

*Economy:* The current economic recession is the most severe downturn most of us have seen in our lifetimes. The immediate effects of this recession on university research are state-wide budget cuts, with results that include hiring freezes, loss of university faculty and staff, higher teaching loads for faculty (with correspondingly less time for research), and delayed improvements in research infrastructure, including major equipment.

However, it is not only the current recession which threatens Idaho university research. Idaho has relatively few industries, and seems to attract fewer new companies and industries than other states. When one major sector suffers, as agriculture is at the present time, the entire state suffers. As state institutions, the research universities suffer. Over time, a relatively slow state economy leads to at least two problems: 1) recruitment and retention of faculty, who go to institutions offering higher salaries, more startup money, and better infrastructure; and 2) aging infrastructure, keeping Idaho researchers behind their national peers in terms of having the most up-to-date facilities and equipment. Without proper infrastructure, Idaho research faculty is at a distinct disadvantage in competing with peers across the nation for federal grants.



*Competition from Other Universities:* In research, university faculty competes nationally for grant funds from federal agencies such as the National Science Foundation, Department of Energy, and the National Institutes of Health. Many other universities are well ahead of Idaho's universities in terms of state funding per student, patent royalty income, endowments, etc., and are able to move ahead at a faster pace, leaving Idaho universities further behind as time goes on.

*University Culture:* Each of Idaho's research universities aspires to greater levels of achievement in research and creative activity, and to emphasize economic development outcomes along with success in basic and applied sciences, engineering and other scholarly pursuits. It is expected in the future that faculty at each of the universities will be rewarded in annual performance reviews for invention disclosure, entrepreneurial engagement, outreach activities and interdisciplinary research along with the traditional value placed on archival publication and external research funding. There is world-class research in Idaho that is recognized on national and international levels in selected fields of endeavor. This is increasing with new research-active faculty hires at each institution. There are some cultural differences among faculty manifested by discomfort with change aimed at increasing research volume making Idaho's universities more nationally competitive. These concerns often lessen as faculty from the various universities, private sector professionals and national laboratory staff work together in collaborative research and related instruction in state-of-the-art activities.

*Vastness of State and Distances Between Schools:* Although the distances between the research universities is not much different from those in other western states, the topography of Idaho increases the time and cost required for travel well beyond those experienced in other states. This fact discourages collaborations between faculty members and administrators at the different research universities as well as between universities and other entities within Idaho. Although video conferencing can alleviate this problem, there is limited capability at each university. There is also the continuing problem of finding funds to pay for the necessary connectivity between the universities as well as to the world outside of Idaho.

*Data Issues:* There is very little long-term, quality data available on the research enterprise or economic development. The data that exists are scattered among various entities in a variety of formats thus make it hard to centralize and use. Furthermore, there is no one entity responsible for collecting, analyzing and dispersing it. This is also true for many of the sectors that will strongly influence the future economic impact of Idaho. While there are large amounts of data that have been collected on watersheds, forests and agricultural operations and the environment—to name a few—they are distributed across a number of agencies and individuals within those agencies. Worse yet, much of this information is lost every time a researcher retires.

*Private Sector Support:* Idaho has very little high-technology industry within its borders. This reduces the potential for developing an applied research initiative within the universities that, in many states, provides one important arm of economic development and technology transfer. This also means that it is much harder to



develop those private/public partnerships that provide the universities with additional capital to construct research and technology transfer facilities. Idaho's relatively small population of 1.6 million people limits the potential tax revenue for support public institutions, but improves participation in research surveys and hearings for establishing public opinion.

*Fragmented Economic Development Initiatives:* There are seemingly too many economic development initiatives in Idaho and they are not well coordinated. It is imperative that state, university, and community initiatives work together toward common and agreed to goals. As it is, little progress is being made towards developing an economic strategy for the state that includes the research universities and little money has been secured to drive the economic development process. In fact, it is not uncommon to find that different entities in Idaho are competing against each other.

*National and International Recognition:* While each Idaho research university has faculty members that can successfully compete on the national and international scene for research funds, no one university has the necessary reputation, breadth of faculty expertise or facilities to compete for the large projects that are necessary to establish a national or international reputation and substantially grow its research funding.

*Lack of Diversity:* The population of faculty, staff and students at each of the three research universities, like that of the State, is fairly homogeneous. This lack of diversity—be it cultural, socio-economic or ethnic—hurts the universities and surrounding communities in several different ways. First, it makes recruitment of students, faculty and staff from under-represented groups more difficult. Second, it is noted on accreditation reports and, as such, is a negative reflection on the institution. Finally, it limits the competitiveness of the university in several federal agencies where plans for including under-represented groups in the program are a key element of the proposal.



**CONSENT AGENDA  
OCTOBER 18, 2012**

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TAB	DESCRIPTION	ACTION
1	SDE Adoption of Curricular and Related Instructional Materials as Recommended by the Curricular Materials Selection Committee	Motion to approve
2	IRSA Idaho State University – Discontinuance of PTE Programs	Motion to approve

**BOARD ACTION**

I move to approve the Consent Agenda as presented.

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



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**CONSENT**  
**OCTOBER 18, 2012**

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**SUBJECT**

Adoption of curricular materials and related instructional materials as recommended by the Curricular Materials Selection Committee.

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-118, Idaho Code  
Idaho Administrative Code 08.02.03.128

**BACKGROUND/DISCUSSION**

The Administrative Rules of the State Board of Education, IDAPA 08.02.03.128.01, 128.02 describe the adoption process for curricular materials as an adoption cycle of six (6) years. Curricular materials are defined as "textbook and instructional media including software, audio/visual media and internet resources" (Idaho Code 33-118A). Idaho is a multiple adoption state. The Curricular Materials Selection Committee is charged with the responsibility to screen, evaluate, and recommend curricular materials for adoption by the State Board of Education.

For 2012, the main adoption cycle is curricular materials in the subject area of English Language Arts. Interim adoption clause allows for submissions in the subject area of Science. Annual adoption continues for Limited English Proficiency and Computer Applications.

This year the curricular materials review week was held June 11 to 15, 2012. Thirty-eight content area specialists assisted the six standing committee members in the evaluation of the curricular materials.

This recommendation is in addition to the previously submitted and approved materials. There was a Review Team calculation error, which has now been corrected. As such, the State Department of Education would like to submit the enclosed materials for consideration. The curricular materials adoption committee recommends the adoption of curricular materials as outlined in the 2012 Curricular Materials Recommendations Document.

**ATTACHMENTS**

Attachment 1 - 2012 Curricular Materials Recommendations Document    Page 3

**BOARD ACTION**

I move to approve the adoption of English Language Arts curricular materials and related instructional materials as recommended by the Curricular Materials Selection Committee as submitted.

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



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# **2012 Curricular Materials Recommendations**

## **Curricular Materials Adoption Process**



**THE IDAHO STATE DEPARTMENT OF EDUCATION  
TOM LUNA  
STATE SUPERINTENDENT OF PUBLIC INSTRUCTION**



## **INTRODUCTION**

The State Curricular Materials Selection Committee is pleased to submit the following materials for your consideration for adoption in the state of Idaho. The 2012 *Session* called for reviewing curricular materials in the main subject area of English Language Arts and interim materials in Science. Annual materials include Computer Applications and Limited English Proficiency.

Several of these materials have accompanying electronic instructional media. Others are deliverable via CD-ROM or the Internet.

The Curricular Materials Selection Committee considers their work an important contribution to the educational process in Idaho. This Committee reflects the diversity of Idaho's population both geographically and philosophically. Occasionally the approval of a certain material is not a unanimous decision by the Committee.



## CURRICULAR MATERIALS ADOPTION PROCEDURES FOR THE STATE OF IDAHO



The Curricular Materials adoption process has its basis in Idaho Code (33-118, 333-118A). It is further defined in the Administrative Rules of the State Board of Education (SBOE), IDAPA 08.02.03, subsection 128.

**The Adoption Process in Idaho** provides for the continuous review and evaluation of new curricular materials. This process ensures that Idaho schools have quality products available to purchase at a guaranteed low price, and equal availability to all Idaho school districts. These materials are screened in order to eliminate any of inferior quality or undesirable content. This process maintains local control in the choice of instruction materials by providing a multiple list of approved materials. The adoption process also provides, through a contract with each publisher, a contract price that is good for the length of the adoption cycle. This ensures quality for each school district and allows for the best materials at the lowest possible price for Idaho's schools.

Idaho adopts materials in the areas of reading, research based reading, literature, drivers education, science, health, handwriting, mathematics, business education, career education, counseling, social studies, English, applied English, spelling, dictionary, thesaurus, speech, journalism, world, languages, art, drama, music, healthy life styles, professional technical education, business computer applications (adopted annually), and limited English proficiency (adopted annually).

Materials are adopted in Idaho on a six-year rotating schedule. Publishers have an additional one-year following the main adoption year to submit new copyrights for a particular content area, allowing each of the content area submissions a total of two years. The intent of the adoption process is to generally approve all materials meeting the established criteria and to reject those items that are considered unsuitable for use in their designated subject area.

Schools are required to select curricular materials from the state approved-adoption listings. Deviation points are subtracted from the school's accreditation report if this is not followed. Materials that serve as supplements to the core curricular materials do not have to be selected from the adoption listings.

Schools may submit a waiver to the Executive Secretary of the Committee requesting to use materials that do not appear on the Approved Listings. Local school boards must approve this request prior to sending it to the Executive Secretary of the Committee. Requests are generally granted for new copyrights not currently under adoption, or materials not submitted to the Selection Committee for consideration. No requests are granted for any materials denied by the Selection Committee or for old copyrights.

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Curricular Materials Adoption



**CONSENT**  
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There are advantages to adopting curricular materials at the state level:

- Contract prices are adhered to for six years, which saves money for the schools.
- Publishers are required to lower the price to Idaho if they lower it to any other state after the contract has been signed.
- Most textbook publishers maintain inventory at the state depository, Caxton Printers, which reduces delivery time and shipping costs.
- Contracts help ensure adopted materials will be available for the life of the contract (6 years).
- Materials are screened for quality, organization, vocabulary and graphic presentation. Textbooks publishers must submit Manufacturing Standards and Specifications for Textbooks (MSST) standards compliance form for each title.
- Materials are screened for fair representation on such issues as environment and industry.
- Instructional materials are screened and thoroughly reviewed by subject area experts to ensure that essential elements are covered.
- Any materials reflecting adversely upon individuals or groups due to race, ethnicity, class, gender, or religion are not approved.
- Small school districts are guaranteed of getting the same textbooks and complementary materials as larger school systems.

**Curricular materials** in Idaho are defined as textbooks and instructional media including software, audio/visual media and Internet resources (Idaho Code 33-118A). Idaho is a multiple adoption state and adopts a number of materials in a designated subject area from a variety of publishing companies. This is consistent with the belief that a variety of materials has value and usefulness to the schools.

**The Curricular Materials Selection Committee**, which is appointed by the SBOE, has the responsibility of overseeing the adoption process for the state. The Executive Secretary to this Committee is an employee of the State Department of Education (SDE).

**The membership** on the 19-member Selection Committee consists of:

- one representative from each of the state's four colleges of education
- one secondary administrator
- one elementary administrator
- two secondary teachers
- two elementary teachers
- one district school board member
- one representative from private/parochial schools
- three parent representatives

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- one member who is not a public school educator nor trustee
- one content area specialist from the SDE
- one representative from the Division of Professional-Technical Education.
- the Executive Secretary

All members are appointed by the SBOE for a five-year term with the exception of the SDE content coordinator and the representative from Professional-Technical Education who serve for one year. Current Committee members are listed in this publication.

The Committee, assisted by English Language Arts, Science, Limited English Proficiency, and Computer Application specialists from throughout the state, met for one week in June to review and correlate all materials to the Common Core State Standards and/or the Idaho Content Standards and specific course requirements. The Committee votes on the materials and those recommended are forwarded to the SBOE for official adoption for Idaho Schools. All meetings of the Committee are open to the public.

Following formal adoption (August 2012), contracts are mailed to the publishing companies (August 2012). After the return of signed contracts, the listing of newly adopted materials is published by December 3, 2012 in the annual Adoption Guide found on the Internet at:  
[http://www.sde.idaho.gov/site/curricular\\_materials/adoption\\_guide.htm](http://www.sde.idaho.gov/site/curricular_materials/adoption_guide.htm).

A state curriculum library is maintained at Caxton Printers as required by Idaho Code 118A. Adopted materials are housed in this library and available to the public. In addition, seven (7) Regional Centers maintain libraries of adopted materials that are available to the public as well as college students and local schools. The Regional Centers are located as follows:

N.L. Terteling Library  
College of Idaho  
Caldwell, Idaho

Curriculum Library  
Lewis-Clark State College  
Lewiston, Idaho

Albertson Library  
Boise State University  
Boise, Idaho

Riley Library  
Northwest Nazarene University  
Nampa, Idaho

David O. McKay Library  
Brigham Young University-Idaho  
Rexburg, Idaho

Instructional Materials Technology Ctr  
University of Idaho  
Moscow, Idaho

Instructional Materials Center  
Idaho State University  
Pocatello, Idaho



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Citizens of Idaho may request the Committee to reconsider any material under adoption. A form titled *Textbook Adoption Process: Request for Reconsideration of Materials* is available from the SDE. The Committee considers all requests and maintains the right to either recommend continued adoption or removal of materials from the adopted list.



**Idaho**  
**STATE CURRICULAR MATERIALS SELECTION COMMITTEE**  
**COMMITTEE MEMBERS LIST AS OF JUNE 2012**

Diann Roberts  
ELA/Reading Coordinator  
Idaho State Dept of Education  
PO Box 83720  
Boise, ID 83720-0027

Emily Perkes  
PTA Parent Representative  
109 South 900 West  
Blackfoot, ID 83221

Patty Silvers  
Public School Trustee  
Murtaugh Jt School Dist. 418  
PO Box 117  
Murtaugh, ID 83344

Darlene Matson Dyer  
Secondary Teacher  
Wood River High School  
950 Fox Acres Road  
Hailey, ID 83333

Tara Drexler  
Elementary Teacher  
Robert Stuart Middle School  
644 Caswell Avenue West  
Twin Falls, ID 83301-3798

Stacey Jensen  
Elementary Teacher  
Edahow Elementary School  
2020 Pocatello Creek Road  
Pocatello, ID 83201

Laree Jansen  
Parent Representative  
3669 North 3200 East  
Kimberly, ID 83341-5344

Elizabeth Flasnck  
Executive Secretary  
Curriculum & Technology Ctr.  
650 West State Street  
Boise, ID 83702

**I**



## 2012 Curricular Materials English Language Arts Recommendations

### Curricular Materials Recommendations - Regular Adoptions

It was moved by Stacey Jensen, seconded by Darlene Dyer, and carried that the curricular materials listed and marked as approved in the Subject Area Review Books for the *Regular Adoption* of ELA materials and their accompanying manuals, guides, keys, and where indicated, instructional software, be recommended by the Idaho State Curricular Materials Selection Committee to the Idaho State Board of Education for adoption and use in the public schools of Idaho in accordance with the policies and regulations of the Idaho State Board of Education.

### Curricular Materials Recommendations – Annual Adoptions

It was moved by Patty Silvers, seconded by Tara Drexler, and carried that the curricular materials listed and marked as approved in the Subject Area Review Books for the *Annual Adoption* of Computer Applications and Limited English Proficiency materials and their accompanying manuals, guides, keys, and where indicated, instructional software, be recommended by the Idaho State Curricular Materials Selection Committee to the Idaho State Board of Education for adoption and use in the public schools of Idaho in accordance with the policies and regulations of the Idaho State Board of Education.

### Curricular Materials Recommendations - Interim Adoptions

It was moved by Laree Jansen, seconded by Emily Perkes, and carried that the curricular materials listed and marked as approved in the Subject Area Review Books for the *Interim Adoption* of Science materials and their accompanying manuals, guides, keys, and where indicated, instructional software, be recommended by the Idaho State Curricular Materials Selection Committee to the Idaho State Board of Education for adoption and use in the public schools of Idaho in accordance with the policies and regulations of the Idaho State Board of Education.

### Adjournment

Motion for adjournment was made by Stacey Jensen, seconded by an Unanimous Vote, and carried to adjourn the meeting on June 14, 2012.

Respectfully submitted,  
Elizabeth Flasnack  
Executive Secretary

2012 English Language Arts RecommendationsIntroduction x  
Curricular Materials Adoption



**IDAHO STATE CURRICULAR MATERIALS  
SELECTION COMMITTEE  
2012 RECOMMENDATIONS**

**English Language Arts  
K-5**



**CONSENT  
OCTOBER 18, 2012**

Publisher	Title of Material	Author	Copyright	Grade Level	ISBN	R=Resource Correlation*
Houghton Mifflin Harcourt School Publishers	<b>Great Source Write Source Grade K ©2012</b>	<b>Patrick Sebranek, Verne Meyer, Dave Kemper</b>	<b>2012</b>	<b>K (K-5)</b>		<b>R</b>
	<b>Notes:</b> Highly recommend as a <u>resource only</u> for writing. 100% alignment to the writing CCSS only. <b>Key Features:</b> <b>1. Gives beginning writers an early introduction to the writing process and forms of writing.</b> Focuses on the writing process, forms, and traits in a clear and age-appropriate Big Book format designed specifically for kindergartners. <b>2. Age appropriate.</b> Write-on/wipe-off pages offer numerous opportunities for shared, interactive, and guided writing. <b>3. Provides complete and comprehensive coverage of the Common Core Writing, Language, Listening, and Speaking Standards.</b> This highly engaging program is designed to help students use cutting-edge technology tools and 21st Century skills to master College and Career Readiness skills for key writing forms, writing process, and grammar, usage, and mechanics skills.					
	Great Source Write Source State Adoption Student Bundle Grade K (Includes Student Book eEdition Online 6-Year (classroom) and 20 copies of Student Book)				9780547819204	
	Great Source Write Source Student Edition eBook 6-Year Online Subscription (Classroom) Grade K				9780547260761	
	Great Source Write Source Student Book Grade K				9780669542080	
	Write Source Teacher Bundle 6-Year Grade K (includes Teacher's Resource CD, Interactive CD, Teacher's Edition, Big Book, Spot Puppet, Teacher's Edition 6-Year Subscription Online Interactive eBook, and Teacher's Resource CD)				9780547737454	
	Great Source Write Source Teacher's Resource CD Grade K				9780669545401	
	Great Source Write Source Interactive CD Grade K				9780669546651	
	Great Source Write Source Teacher's Edition Grade K				9780669006643	
	Great Source Write Source Big Book Grade K				9780669542066	
	Great Source Write Source Spot Puppet Grade K				9780669501001	
	Great Source Write Source Teacher's Edition 6-Year Subscription Online Interactive eBook Grade K				9780547260785	
	Great Source Write Source Teacher's Resource CD Grade K				9780669545401	
	Great Source Write Source Student Edition eTextbook PDF Grade K				9780547775913	
Houghton Mifflin Harcourt School Publishers	<b>Great Source Write Source Grade 1 ©2012</b>	<b>Patrick Sebranek, Verne Meyer, Dave Kemper</b>	<b>2012</b>	<b>1 (K-5)</b>		<b>R</b>
	<b>Notes:</b> Recommend as a <u>resource only</u> for writing. 86% alignment to the writing CCSS only. <b>Key Features:</b> <b>1. The only print and fully personalized digital language arts program with complete and comprehensive coverage of the Common Core Writing, Language, Listening, and Speaking Standards.</b> This highly engaging program is designed to help students use cutting-edge technology tools and 21st Century skills to master College and Career Readiness skills for key writing forms, writing process, and grammar, usage, and mechanics skills. <b>2. Contains instructional depth and breadth to meet the rigor set forth by the Common Core State Standards. Students will engage in all aspects of writing and language literacy, from writing for different purposes to responding to sets of information and literary texts; and from conducting meaningful research (both in print and online), to understanding the conventions of the language.</b> <b>3. Meets Common Core Writing Standard 6 in ways that traditional reading and language arts programs don't.</b> Social learning, collaboration tools, and immediate online publishing opportunities in a secure environment are key features of the program.					
	Great Source Write Source State Adoption Student Bundle Grade 1 (Includes Online Student 6-year Subscription, Student Edition Hardcover, and SkillsBook Student Edition)				9780547819150	
	Great Source Write Source Online Student Subscription 6-year Grade 1				9780547508368	
	Great Source Write Source Student Edition Hardcover Grade 1				9780547484891	
	Great Source Write Source SkillsBook Student Edition Grade 1				9780547484310	
	Great Source Write Source Teacher Bundle 6-Year Grade 1 (includes Teacher's Edition, Assessment Book Teacher's Edition, SkillsBook, SkillsBook Teacher's Edition with Annos Layer, Daily Language Workouts, and Online Teacher Subscription 6-Year)				9780547716220	
	Great Source Write Source Teacher's Edition Grade 1				9780547484327	
	Great Source Write Source Assessment Teacher's Edition Grade 1				9780547484846	



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	Great Source Write Source SkillsBook Student Edition Grade 1				9780547484310	
	Great Source Write Source SkillsBook Teacher's Edition Grade 1				9780547484358	
	Great Source Write Source Daily Language Workouts Grade 1				9780547485256	
	Great Source Write Source Online Teacher Subscription 6-Year Grade 1				9780547508818	
	Great Source Write Source Student Edition eTextbook ePub Grade 1				9780547782935	
Houghton Mifflin Harcourt School Publishers	Great Source Write Source Grade 2 ©2012	Patrick Sebranek, Verne Meyer, Dave Kemper	2012	2 (K-5)		R
	<b>Notes:</b> Recommend as a <u>resource only</u> for writing. 79% alignment to the writing CCSS only. <b>Key Features:</b> <b>1. The only print and fully personalized digital language arts program with complete and comprehensive coverage of the Common Core Writing, Language, Listening, and Speaking Standards.</b> This highly engaging program is designed to help students use cutting-edge technology tools and 21st Century skills to master College and Career Readiness skills for key writing forms, writing process, and grammar, usage, and mechanics skills. <b>2. Contains instructional depth and breadth to meet the rigor set forth by the Common Core State Standards.</b> Students will engage in all aspects of writing and language literacy, from writing for different purposes to responding to sets of information and literary texts; and from conducting meaningful research (both in print and online), to understanding the conventions of the language. <b>3. Meets Common Core Writing Standard 6 in ways that traditional reading and language arts programs don't.</b> Social learning, collaboration tools, and immediate online publishing opportunities in a secure environment are key features of the program.					
	Great Source Write Source State Adoption Student Bundle Grade 2 (Includes Online Student Subscription 6-year, Student Edition Hardcover, and SkillsBook Student Edition)				9780547819167	
	Great Source Write Source Online Student Subscription 6-year Grade 2				9780547508405	
	Great Source Write Source Student Edition Hardcover Grade 2				9780547484969	
	Great Source Write Source SkillsBook Student Edition Grade 2				9780547484365	
	Great Source Write Source Teacher Bundle 6-Year Grade 2 (includes Teacher's Edition, Assessment Book Teacher's Edition, SkillsBook, SkillsBook Teacher's Edition with Annos Layer, Daily Language Workouts, and Online Teacher Subscription 6-Year)				9780547715551	
	Great Source Write Source Teacher's Edition Grade 2				9780547484341	
	Great Source Write Source Assessment Teacher's Edition Grade 2				9780547484914	
	Great Source Write Source SkillsBook Student Edition Grade 2				9780547484365	
	Great Source Write Source SkillsBook Teacher's Edition Grade 2				9780547484334	
	Great Source Write Source Daily Language Workouts Grade 2				9780547485126	
	Great Source Write Source Online Teacher Subscription 6-Year Grade 2				9780547508849	
	Great Source Write Source Student Edition eTextbook ePub Grade 2				9780547782942	



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**IDAHO STATE UNIVERSITY**

**SUBJECT**

Discontinuation of Professional-Technical Education Programs

**APPLICABLE STATUTES, RULE OR POLICY**

Idaho State Board of Education Policies and Procedures, III.G. and IDAPA  
55.01.02, Section 101.02

**BACKGROUND/DISCUSSION**

Idaho State University is requesting approval to discontinue various professional-technical education programs and options within the College of Technology. The program terminations are due to low student enrollment, market downturn, program inactivity, or program inefficiencies.

The programs to be discontinued include Building Construction Technology; Laser Electro-Optics Technology; the Medical Office Technology option and the Legal Office Technology option of the Business Technology program; and the Electronic Technology (Core), Electromechanical Technology, and Electronic Wireless/Telecommunications Technology.

**IMPACT**

Programs are in the teach-out phase and advisors have contacted students to ensure all students have been afforded the opportunity to graduate before discontinuing programs or transfer to another program. The options being discontinued are no longer accepting students and have not done so for several years. The fiscal impact for these program discontinuations range from \$64,261 to \$287,018 per year.

**ATTACHMENTS**

Attachment 1 – Proposal – Building Construction Technology	Page 3
Attachment 2 – Proposal – Laser Electro-Optics Technology	Page 11
Attachment 3 – Proposal – Medical Office Technology Option	Page 19
Attachment 4 – Proposal – Legal Office Technology Option	Page 27
Attachment 5 – Proposal – Electronic, Electromechanical and Electronic Wireless Telecommunications	Page 35

**STAFF COMMENTS AND RECOMMENDATIONS**

The Division of Professional-Technical Education has reviewed the programs slated for termination and recommends State Board approval.



**CONSENT**  
**OCTOBER 18, 2012**

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**BOARD ACTION**

I move to approve the request from Idaho State University to terminate the designated professional-technical education programs as presented in Attachments 1-5.

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





Idaho Division of Professional-Technical Education  
650 West State Street, P.O. Box 83720, Boise, Idaho 83720-0095  
Phone (208) 334-3216, Fax (208) 334-2365  
<http://www.pte.idaho.gov>

**MEMORANDUM**

September 17, 2012

TO: Mike Rush  
Executive Director  
State Board of Education

FROM: Todd Schwarz  
Administrator 

SUBJECT: Notice of Intent

In accordance with State Board policy, the enclosed Notice of Intent is forwarded for approval by the State Board for Professional-Technical Education.

The College of Technology at Idaho State University has requested to discontinue the **Building Construction Technology** program due to low enrollments, a downturn in the housing market, and a very sluggish economy that have affected this program to the point that it is no longer cost effective to operate.

The Division has reviewed and approved the request and recommends State Board approval. Please notify the Division office of State Board action when completed.

If you have any questions regarding the enclosed request, please let me know. Thank you.

TS/ds

Enclosure



RECEIVED

AUG 20 2012

OFFICE OF THE  
STATE BOARD OF EDUCATION**Idaho State Board of Education****Proposal for Other Academic Program Activity and Professional-Technical Education**

Date of Proposal Submission:	5/8/12
Institution Submitting Proposal:	Idaho State University
Name of College, School, or Division:	College of Technology
Name of Department(s) or Area(s):	Building Construction Technology

RECEIVED  
AUG 21 2012**Program Identification for Proposed New, Modified, or Discontinued Program:**

Title:	Building Construction Technology		
Degree:	Advanced Technical Certificate and Associate of Applied Science		
Method of Delivery:	Classroom		
CIP code (consult IR /Registrar)	46.0201		
Proposed Starting Date:	N/A		
Indicate if the program is:	<input checked="" type="checkbox"/> Regional Responsibility	<input type="checkbox"/>	Statewide Responsibility

**Indicate whether this request is either of the following:**

- |   |  |
|---|--|
| <input type="checkbox"/> New Program (minor/option/emphasis or certificate) | <input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option |
| <input type="checkbox"/> New Off-Campus Instructional Program               | <input type="checkbox"/> Consolidation of an Existing Program                    |
| <input type="checkbox"/> New Instructional/Research Unit                    | <input type="checkbox"/> Expansion of an Existing Program                        |
| <input type="checkbox"/> Contract Program/Collaborative                     | <input type="checkbox"/> Other   |

*R. Scott Ramsey* 14 May 12  
College Dean (Institution) Date

*n/a*  
Graduate Dean (as applicable) Date

*James A. Idol*  
Chief Fiscal Officer (Institution) Date

*Barbara Adams* 7/20/12  
Chief Academic Officer (Institution) Date

*Arthur V. Vukobratovic* 7/23/12  
President Date

*n/a*  
Vice President for Research (as applicable) Date

*Todd Swartz* 9.17.12  
State Administrator, SDPTE (as applicable) Date

Academic Affairs Program Manager Date

Chief Academic Officer, OSBE Date

SBOE/OSBE Approval Date

March 16, 2012

Page 1



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

The Building Construction Technology program will be discontinued due to low enrollment over the last five years. The home building market is down significantly and job prospects in home building are negligible at best. Low enrollments, a downturn in the housing market, and a very sluggish economy have affected this program to the point that it is no longer cost effective to operate.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. ***This question is not applicable to requests for discontinuance.***

N/A

- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. ***This question is not applicable to requests for discontinuance.***

N/A

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests. This question is not applicable to requests for discontinuance.***

N/A

- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** ***This question is not applicable to requests for discontinuance.***

N/A

Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

- 6. Identify similar programs offered within Idaho or in the region by other colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. ***This question is not applicable to requests for discontinuance.***

N/A

March 16, 2012

Page 2



## Degrees/Certificates offered by school/college or program(s) within disciplinary area under review

Institution and Degree name	Level	Specializations within the discipline (to reflect a national perspective)	Specializations offered within the degree at the institution
BSU			
CSI			
CWI			
EITC			
ISU			
LCSC			
NIC			
UI			

7. **Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

N/A

8. **Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
BSU	n/a	n/a	n/a	n/a	n/a	n/a	
CSI	22	40	40	2	3	3	
CWI	n/a	n/a	n/a	n/a	n/a	n/a	
EITC	n/a	n/a	n/a	n/a	n/a	n/a	
ISU	12	16	16	3	5	5	
LCSC	n/a	n/a	n/a	n/a	n/a	n/a	

March 16, 2012

Page 3



NIC	18	11	9	13	11	6	
UI	n/a	n/a	n/a	n/a	n/a	n/a	

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

No.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

N/A

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

- Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C.**
- Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.
- Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

N/A

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

N/A

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is*  
*March 16, 2012*

*Page 4*



not applicable to requests for discontinuance.

N/A

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal

- 14. Is the proposed program in your institution's Five-Year plan? Indicate below. This question is not applicable to requests for discontinuance.**

N/A

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

- 14. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally). For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?**

The closure of the daytime course of study must be made due to low enrollment and a poor job market. However, classes can still be offered through Workforce Training if a valid need is identified. If the housing market eventually rebounds, skills for that industry can be taught as non-credit. This program has been in a teach-out phase and advisors have contacted students to ensure that all interested students who had taken at least one semester of the program had the opportunity to graduate before discontinuing the program.

- 16. Program Resource Requirements.** Using the Excel spreadsheet provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

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**Program Resource Requirements.** Provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**A. REVENUE (closing program)**

	FY		FY		FY		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocation)	\$64,261.80								\$64,261.80	\$0.00
2. Appropriated (New)	\$0.00								\$0.00	\$0.00
3. Federal	\$0.00								\$0.00	\$0.00
4. Tuition	\$0.00								\$0.00	\$0.00
5. Student Fees	\$0.00								\$0.00	\$0.00
6. Other (Specify)	\$0.00								\$0.00	\$0.00
<b>Total Revenue</b>	<u>\$64,261.80</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$64,261.80</u>	<u>\$0.00</u>

**B. EXPENDITURES**

	FY		FY		FY		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Personnel	\$48,588.80								\$48,588.80	\$0.00
2. Operating	\$15,673.00								\$15,673.00	\$0.00
3. Equipment	0								\$0.00	\$0.00
4. Facilities	0								\$0.00	\$0.00
5. Other (Specify)	0								\$0.00	\$0.00
<b>Total Expenditures</b>	<u>\$64,261.80</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$64,261.80</u>	<u>\$0.00</u>
<b>Net Income (Deficit)</b>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>

*Ongoing is defined as ongoing operating budget for the program which will become part of the base.*

*One-time is defined as one-time funding in a fiscal year and not part of the base.*



Note: This program was in a teach-out phase for two years. Instructors are retiring and money will be reallocated to existing and/or new programs on the 5 Year Plan.



**MEMORANDUM**

September 17, 2012

TO: Mike Rush  
Executive Director  
State Board of Education

FROM: Todd Schwarz  
Administrator



SUBJECT: Notice of Intent

In accordance with State Board policy, the enclosed Notice of Intent is forwarded for approval by the State Board for Professional-Technical Education.

The College of Technology at Idaho State University has requested to discontinue the **Laser/Electro-Optics Technology** program. It was not active in FY2012.

The Division has reviewed and approved the request and recommends State Board approval. Please notify the Division office of State Board action when completed.

If you have any questions regarding the enclosed request, please let me know. Thank you.

TS/ds

Enclosure



2012 05  
**RECEIVED**  
 AUG 21 2012

# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education

Date of Proposal Submission:	5/8/12
Institution Submitting Proposal:	Idaho State University
Name of College, School, or Division:	College of Technology
Name of Department(s) or Area(s):	Technical Department (Laser/Electro-Optics Technology program)

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Laser/Electro-Optics Technology		
Degree:	Advanced Technical Certificate and Associate of Applied Science		
Method of Delivery:	Classroom		
CIP code (consult IR /Registrar)	15.0304		
Proposed Starting Date:	N/A		
Indicate if the program is:	x	Regional Responsibility	Statewide Responsibility

### Indicate whether this request is either of the following:

- |   |  |
|---|--|
| <input type="checkbox"/> New Program (minor/option/emphasis or certificate) | <input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option |
| <input type="checkbox"/> New Off-Campus Instructional Program               | <input type="checkbox"/> Consolidation of an Existing Program                    |
| <input type="checkbox"/> New Instructional/Research Unit                    | <input type="checkbox"/> Expansion of an Existing Program                        |
| <input type="checkbox"/> Contract Program/Collaborative                     | <input type="checkbox"/> Other   |

*Scott Brown* 14 May 12  
 College Dean (Institution) Date

n/a  
 Graduate Dean (as applicable) Date

*James A. Edwards* 7/21/12  
 Chief Fiscal Officer (Institution) Date

*Barbara Adams* 7/20/12  
 Chief Academic Officer (Institution) Date

*Curtis Kauter* 7/23/12  
 President Date

n/a  
 Vice President for Research (as applicable) Date

*Todd Swartz* 9.17.12  
 State Administrator, SDPTE (as applicable) Date

Academic Affairs Program Manager Date

Chief Academic Officer, OSBE Date

SBOE/OSBE Approval Date

March 16, 2012

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**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

This purpose of this NOI is to request the discontinuance of the Laser/Electro-Optics Technology program at Idaho State University's College of Technology. The Laser/Electro-Optics Technology program has had a history of low enrollment and the program instructor/coordinator was given a terminal contract for the 2010-2011 school year. In spring, 2011 the instructor resigned. The decision was made to close the program as reflected in this NOI. The Technical Certificate in Laser Electro-Optics offered in the Robotics and Communications Systems Engineering Technology program will remain intact because it is an optional certificate for Robotics students and taught by faculty in the Robotics program.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. ***This question is not applicable to requests for discontinuance.***

Not applicable. This NOI is requesting to close the program.

- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. ***This question is not applicable to requests for discontinuance.***

Not applicable. This NOI is requesting to close the program.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests. This question is not applicable to requests for discontinuance.***

Not applicable. This NOI is requesting to close the program.

- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** ***This question is not applicable to requests for discontinuance.***

Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

- 6. Identify similar programs offered within Idaho or in the region by other colleges/universities.** If the proposed request is similar to another state program, provide a rationale for

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the duplication. Institutions do not need to complete this section for PTE programs. **This question is not applicable to requests for discontinuance.**

N/A

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

Institution and Degree name	Level	Specializations within the discipline (to reflect a national perspective)	Specializations offered within the degree at the institution
BSU			
CSI			
CWI			
EITC			
ISU			
LCSC			
NIC			
UI			

- 7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. **This question is not applicable to requests for discontinuance.**

N/A

- 8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
BSU	n/a	n/a	n/a	n/a	n/a	n/a	
CSI	n/a	n/a	n/a	n/a	n/a	n/a	
CWI	n/a	n/a	n/a	n/a	n/a	n/a	

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EITC	n/a	n/a	n/a	n/a	n/a	n/a	
ISU	17	17	17	15	9	10	
LCSC	n/a	n/a	n/a	n/a	n/a	n/a	
NIC	n/a	n/a	n/a	n/a	n/a	n/a	
UI	n/a	n/a	n/a	n/a	n/a	n/a	

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

No.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

N/A

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

- Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.
- Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.
- Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

N/A



12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

N/A

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

N/A

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal

14. Is the proposed program in your institution's Five-Year plan? Indicate below. *This question is not applicable to requests for discontinuance.*

N/A

Yes \_\_\_\_ No x

If not on your institution's Five-Year plan, provide a justification for adding the program.

15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally). *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

This program was in a teach-out phase and all students in the program were provided the opportunity to either transfer to another Energy Systems or Robotics and Communications program or to graduate.

16. **Program Resource Requirements.** Using the *Excel spreadsheet* provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).



**Program Resource Requirements.** Provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**A. REVENUE**

	FY2011		FY2012		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocation)			-\$79,562.59				-\$79,562.59	\$0.00
2. Appropriated (New)							\$0.00	\$0.00
3. Federal							\$0.00	\$0.00
4. Tuition							\$0.00	\$0.00
5. Student Fees							\$0.00	\$0.00
6. Other (Specify)							\$0.00	\$0.00
<b>Total Revenue</b>	\$0.00	\$0.00	-\$79,562.59	\$0.00	\$0.00	\$0.00	-\$79,562.59	\$0.00

**B. EXPENDITURES**

	FY2011		FY2012		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Personnel	\$73,544.13		-\$73,544.13				\$0.00	\$0.00
2. Operating	\$6,018.46		-\$6,018.46				\$0.00	\$0.00
3. Equipment	0						\$0.00	\$0.00
4. Facilities	0						\$0.00	\$0.00
5. Other (Specify)							\$0.00	\$0.00
<b>Total Expenditures</b>	\$79,562.59	\$0.00	-\$79,562.59	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Net Income (Deficit)</b>	-\$79,562.59	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

*Ongoing is defined as ongoing operating budget for the program which will become part of the base.  
One-time is defined as one-time funding in a fiscal year and not part of the base.*

Program Proposal Budget Template  
(Baccalaureate, Graduate, Doctorate)  
March 7, 2012  
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**MEMORANDUM**

September 13, 2012

TO: Mike Rush  
Executive Director  
State Board of Education

FROM: Todd Schwarz  
Administrator



SUBJECT: Notice of Intent

In accordance with State Board policy, the enclosed Notice of Intent is forwarded for approval by the State Board for Professional-Technical Education.

The College of Technology at Idaho State University has requested to discontinue the **Medical Office Technology** option of the **Business Technology** program. The credential earned in this option is no longer necessary because students are successful in finding employment after earning certificates and/or degrees in other options offered in the medical area.

The Division has reviewed and approved the request and recommends State Board approval. Please notify the Division office of State Board action when completed.

If you have any questions regarding the enclosed request, please let me know. Thank you.

TS/ds

Enclosures



**RECEIVED**  
**AUG 21 2012****Idaho State Board of Education****Proposal for Other Academic Program Activity and Professional-Technical Education**

Date of Proposal Submission:	5/8/12
Institution Submitting Proposal:	Idaho State University
Name of College, School, or Division:	College of Technology
Name of Department(s) or Area(s):	Business & Service Department, Business Technology (formerly Business Information)

**Program Identification for Proposed New, Modified, or Discontinued Program:**

Title:	Medical Office Technology		
Degree:	Advanced Technical Certificate		
Method of Delivery:	Classroom		
CIP code (consult IR /Registrar)	52.0401		
Proposed Starting Date:	N/A		
Indicate if the program is:	<input checked="" type="checkbox"/> Regional Responsibility	<input type="checkbox"/>	Statewide Responsibility

**Indicate whether this request is either of the following:**

- |   |  |
|---|--|
| <input type="checkbox"/> New Program (minor/option/emphasis or certificate) | <input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option |
| <input type="checkbox"/> New Off-Campus Instructional Program               | <input type="checkbox"/> Consolidation of an Existing Program                    |
| <input type="checkbox"/> New Instructional/Research Unit                    | <input type="checkbox"/> Expansion of an Existing Program                        |
| <input type="checkbox"/> Contract Program/Collaborative                     | <input type="checkbox"/> Other   |

R. Scott Ramsey 14 May 12  
College Dean (Institution) Date

n/a  
Graduate Dean (as applicable) Date

James H. Hatcher 7/21/12  
Chief Fiscal Officer (Institution) Date

Barbara Adams 7/20/12  
Chief Academic Officer (Institution) Date

Arthur K. Kates 7/23/12  
President Date

n/a  
Vice President for Research (as applicable) Date

Toell Gruenz 9.13.12  
State Administrator, SDPTE (as applicable) Date

Academic Affairs Program Manager Date

Chief Academic Officer, OSBE Date

SBOE/OSBE Approval Date

March 16, 2012

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**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

This is a request to discontinue the option of Advanced Technical Certificate: Medical Office Technology. A medical option had been a choice for many years within the Business Technology program. Now students have other options within the medical area, including Health Information Technology classes and Medical Assisting classes. Students with a general certificate or degree in Accounting Technology or Administrative Technology are also successful in finding employment in medical offices and hospitals. This credential is no longer necessary

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. ***This question is not applicable to requests for discontinuance.***

This option will be discontinued and is no longer accepting students.

- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. ***This question is not applicable to requests for discontinuance.***

N/A. This request is for a discontinuance of the advanced technical certificate.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests. This question is not applicable to requests for discontinuance.***

- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** ***This question is not applicable to requests for discontinuance.***

Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

March 16, 2012

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**6. Identify similar programs offered within Idaho or in the region by other**

**colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. **This question is not applicable to requests for discontinuance.**

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

Institution and Degree name	Level	Specializations within the discipline (to reflect a national perspective)	Specializations offered within the degree at the institution
BSU			
CSI			
CWI			
EITC			
ISU			
LCSC			
NIC			
UI			

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B.** **This question is not applicable to requests for discontinuance.****8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.



Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
BSU	N/A	N/A	N/A	N/A	N/A	N/A	
CSI	N/A	N/A	N/A	N/A	N/A	N/A	
CWI	19	N/A	N/A	0	N/A	N/A	
EITC	N/A	N/A	N/A	N/A	N/A	N/A	
ISU	0	0	0	0	0	0	
LCSC	37	37	33	11	8	13	
NIC	434	309	225	68	28	18	
UI	N/A	N/A	N/A	N/A	N/A	N/A	

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

N/A. This request is for the discontinuance of an advanced technical certificate.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. **This question is not applicable to requests for discontinuance.**

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. **This question is not applicable to requests for discontinuance.**

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

- Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.
- Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.
- Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

March 16, 2012

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11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal

14. Is the proposed program in your institution's Five-Year plan? Indicate below. *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally). *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

This option will be discontinued and is no longer accepting students and has not accepted students for several years.

16. **Program Resource Requirements.** Using the *Excel spreadsheet* provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

N/A The budget was transferred to other existing programs several years ago.

March 16, 2012

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**Program Resource Requirements.** Provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**A. REVENUE**

	FY		FY		FY		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocation)	n/a								\$0.00	\$0.00
2. Appropriated (New)									\$0.00	\$0.00
3. Federal									\$0.00	\$0.00
4. Tuition									\$0.00	\$0.00
5. Student Fees									\$0.00	\$0.00
6. Other (Specify)									\$0.00	\$0.00
<b>Total Revenue</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**B. EXPENDITURES**

	FY		FY		FY		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Personnel	n/a								\$0.00	\$0.00
2. Operating									\$0.00	\$0.00
3. Equipment									\$0.00	\$0.00
4. Facilities									\$0.00	\$0.00
5. Other (Specify)									\$0.00	\$0.00
<b>Total Expenditures</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Net Income (Deficit)</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Ongoing is defined as ongoing operating budget for the program which will become part of the base.

One-time is defined as one-time funding in a fiscal year and not part of the base.



Note: No cost savings will be realized and no additional resources will be required with the discontinuance of these credentials. When faculty retired a few years ago, they were not replaced, and we have not accepted students into this option since that time.



**MEMORANDUM**

September 13, 2012

TO: Mike Rush  
Executive Director  
State Board of Education

FROM: Todd Schwarz  
Administrator



SUBJECT: Notice of Intent

In accordance with State Board policy, the enclosed Notice of Intent is forwarded for approval by the State Board for Professional-Technical Education.

The College of Technology at Idaho State University has requested to discontinue the **Legal Office Technology** option of the **Business Technology** program. The courses required for this option have not been offered for approximately five years and there have been no graduates in the option since then.

The Division has reviewed and approved the request and recommends State Board approval. Please notify the Division office of State Board action when completed.

If you have any questions regarding the enclosed request, please let me know. Thank you.

TS/ds

Enclosures



**RECEIVED**  
**AUG 21 2012****Idaho State Board of Education****Proposal for Other Academic Program Activity and Professional-Technical Education**

Date of Proposal Submission:	5/8/12
Institution Submitting Proposal:	Idaho State University
Name of College, School, or Division:	College of Technology
Name of Department(s) or Area(s):	Business Technology (formerly Business Information)

**Program Identification for Proposed New, Modified, or Discontinued Program:**

Title:	Legal Office Technology		
Degree:	Technical Certificate and Associate of Applied Science		
Method of Delivery:	classroom		
CIP code (consult IR /Registrar)	52-0401		
Proposed Starting Date:	N/A		
Indicate if the program is:	<input checked="" type="checkbox"/> Regional Responsibility	<input type="checkbox"/>	Statewide Responsibility

**Indicate whether this request is either of the following:**

- |   |  |
|---|--|
| <input type="checkbox"/> New Program (minor/option/emphasis or certificate) | <input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option |
| <input type="checkbox"/> New Off-Campus Instructional Program               | <input type="checkbox"/> Consolidation of an Existing Program                    |
| <input type="checkbox"/> New Instructional/Research Unit                    | <input type="checkbox"/> Expansion of an Existing Program                        |
| <input type="checkbox"/> Contract Program/Collaborative                     | <input type="checkbox"/> Other   |

K. Scott Ramsey 14 May 12  
College Dean (Institution) Date

n/a  
Vice President for Research (as applicable) Date

n/a  
Graduate Dean (as applicable) Date

Tall Swartz 9.13.12  
State Administrator, SDPTE (as applicable) Date

James A. Ditcher 7/21/12  
Chief Fiscal Officer (Institution) Date

Academic Affairs Program Manager Date

Barbara Adams 7/20/12  
Chief Academic Officer (Institution) Date

Chief Academic Officer, OSBE Date

Arthur V. Kistner 7/23/12  
President Date

SBOE/OSBE Approval Date

March 16, 2012

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**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

This is a request to discontinue the options of Technical Certificate: Legal Office Technology; and Associate of Applied Science: Legal Office Technology from the Business Technology, formerly Business Technology Program. Since the addition of the Paralegal Studies program about ten years ago, many students with an interest in the legal area have pursued that course of study. Also, many students with a general degree the Business Technology have the skills required for an entry-level legal administrative assistant position. The Business Technology program stopped offering the specialized courses needed for these credentials about five years ago and have had no graduates in these options since then.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*

N/A This option will be discontinued and is no longer accepting students.

- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

N/A. This request is for a discontinuance of an option.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*

N/A. This request is for a discontinuance of an option.

- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*

Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

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6. **Identify similar programs offered within Idaho or in the region by other colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. **This question is not applicable to requests for discontinuance.**

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

<b>Institution and Degree name</b>	<b>Level</b>	<b>Specializations within the discipline (to reflect a national perspective)</b>	<b>Specializations offered within the degree at the institution</b>
<b>BSU</b>			
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b>			
<b>LCSC</b>			
<b>NIC</b>			
<b>UI</b>			

7. **Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B.** **This question is not applicable to requests for discontinuance.**



- 8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
BSU	N/A	N/A	N/A	N/A	N/A	N/A	N/A
CSI	N/A	N/A	N/A	N/A	N/A	N/A	N/A
CWI	35	N/A	N/A	5	N/A	N/A	
EITC	N/A	N/A	N/A	N/A	N/A	N/A	N/A
ISU	0	0	0	0	0	0	0
LCSC	8	7	6	0	0	2	
NIC	434	309	225	68	28	18	
UI	N/A	N/A	N/A	N/A	N/A	N/A	N/A

- 9. Will this program reduce enrollments in other programs at your institution? If so, please explain.**

N/A This option will be discontinued and is no longer accepting students.

- 10. Provide verification of state workforce needs such as job titles requiring this degree.** Include State and National Department of Labor research on employment potential. ***This question is not applicable to requests for discontinuance.***

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
<b>Region</b>				
<b>State</b>				
<b>Nation</b>				

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- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.
- b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.
- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal

14. Is the proposed program in your institution's Five-Year plan? Indicate below. *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.



15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally). *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

This option will be discontinued and is no longer accepting students and has not accepted students for several years.

16. **Program Resource Requirements.** Using the Excel spreadsheet provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

N/A      The budget was transferred to other existing programs several years ago.



**Program Resource Requirements.** Provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**A. REVENUE**

	FY		FY		FY		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocation)									\$0.00	\$0.00
2. Appropriated (New)									\$0.00	\$0.00
3. Federal									\$0.00	\$0.00
4. Tuition									\$0.00	\$0.00
5. Student Fees									\$0.00	\$0.00
6. Other (Specify)									\$0.00	\$0.00
<b>Total Revenue</b>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>

**B. EXPENDITURES**

	FY		FY		FY		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Personnel									\$0.00	\$0.00
2. Operating									\$0.00	\$0.00
3. Equipment									\$0.00	\$0.00
4. Facilities									\$0.00	\$0.00
5. Other (Specify)									\$0.00	\$0.00
<b>Total Expenditures</b>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>
<b>Net Income (Deficit)</b>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>

*Ongoing is defined as ongoing operating budget for the program which will become part of the base.*

*One-time is defined as one-time funding in a fiscal year and not part of the base.*


**Note:** No cost savings will be realized and no additional resources will be required with the discontinuance of these programs. Disposal Budget Template  
When faculty retired a few years ago, they were not replaced, and we have not accepted students into this option since that time. Graduate, Doctorate)



**MEMORANDUM**

September 17, 2012

TO: Mike Rush  
Executive Director  
State Board of Education

FROM: Todd Schwarz  
Administrator 

SUBJECT: Notice of Intent

In accordance with State Board policy, the enclosed Notice of Intent is forwarded for approval by the State Board for Professional-Technical Education.

The College of Technology at Idaho State University has requested to discontinue the following three programs due to a continuing effort to reorganize after the Electronics Department was changed to the Energy Systems Technology and Education Center:

**Electronic Technology (Core)**  
**Electromechanical Technology**  
**Electronic Wireless/Telecommunications Technology**

The Division has reviewed and approved the request and recommends State Board approval. Please notify the Division office of State Board action when completed.

If you have any questions regarding the enclosed request, please let me know. Thank you.

TS/ds

Enclosure



**RECEIVED****AUG 21 2012****Idaho State Board of Education****Proposal for Other Academic Program Activity and Professional-Technical Education**

Date of Proposal Submission:	5/8/12
Institution Submitting Proposal:	Idaho State University
Name of College, School, or Division:	College of Technology
Name of Department(s) or Area(s):	Energy Systems Technology and Education Center (formerly Electronics Department)

**Program Identification for Proposed New, Modified, or Discontinued Program:**

Title:	Electronics Core, Electro-Mechanical Technology, Electronic Wireless/Telecom Technology programs		
Degree:	Advanced Technical Certificate and Associate of Applied Science		
Method of Delivery:	Classroom		
CIP code (consult IR /Registrar)	15.0303, 15.0403, 47.0103		
Proposed Starting Date:	N/A		
Indicate if the program is:	<input checked="" type="checkbox"/> Regional Responsibility	<input type="checkbox"/>	Statewide Responsibility

**Indicate whether this request is either of the following:**

- |   |  |
|---|--|
| <input type="checkbox"/> New Program (minor/option/emphasis or certificate) | <input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option |
| <input type="checkbox"/> New Off-Campus Instructional Program               | <input type="checkbox"/> Consolidation of an Existing Program                    |
| <input type="checkbox"/> New Instructional/Research Unit                    | <input type="checkbox"/> Expansion of an Existing Program                        |
| <input type="checkbox"/> Contract Program/Collaborative                     | <input type="checkbox"/> Other   |

*Scott Rasmussen* 14 May 12  
 College Dean (Institution) Date

*n/a*  
 Vice President for Research (as applicable) Date

*n/a*  
 Graduate Dean (as applicable) Date

*Tracy R. [Signature]* 9.17.12  
 State Administrator, SDPTE (as applicable) Date

*James B. Fletcher* 7/21/12  
 Chief Fiscal Officer (Institution) Date

Academic Affairs Program Manager Date

*Barbara Adamu* 7/20/12  
 Chief Academic Officer (Institution) Date

Chief Academic Officer, OSBE Date

*Arthur [Signature]* 7/23/12  
 President Date

SBOE/OSBE Approval Date

March 16, 2012

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**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuation. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

This NOI requests:

- the discontinuance of the Electronics-Core
- the discontinuance of the Electro-Mechanical Technology program
- the discontinuance of the Electronic Wireless/Telecom Technology program

We request to discontinue the Electronics Core Curriculum, the Electro-Mechanical Technology and the Electronic Wireless/Telecom Technology programs.

The Electro-Mechanical Technology and the Electronic Wireless/Telecom Technology programs have not enrolled students for more than six years. The Electronics Core Courses and some courses in the discontinued programs will be moved to the Energy Systems Technology and Education Center (ESTEC) and will be renamed with appropriate program prefixes and course numbers. Students will be accepted directly to Energy Systems programs rather than a first year Electronics-Core. This is a continuance of an effort to reorganize after the Electronics Department was changed to the Energy Systems Technology and Education Center (See NOI 2011-01).

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. **This question is not applicable to requests for discontinuance.**

N/A

- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. **This question is not applicable to requests for discontinuance.**

N/A

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. **Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests. This question is not applicable to requests for discontinuance.**

N/A

- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** **This question is not applicable to requests for discontinuance.**

N/A

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Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

6. **Identify similar programs offered within Idaho or in the region by other colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. **This question is not applicable to requests for discontinuance.**

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

<b>Institution and Degree name</b>	<b>Level</b>	<b>Specializations within the discipline (to reflect a national perspective)</b>	<b>Specializations offered within the degree at the institution</b>
<b>BSU</b>			
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b>			
<b>LCSC</b>			
<b>NIC</b>			
<b>UI</b>			

7. **Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B. This question is not applicable to requests for discontinuance.**

N/A

8. **Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

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No other colleges/universities in Idaho offer degrees in electro-mechanical or electronic wireless/telecom discipline.

Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
BSU	N/A	N/A	N/A	N/A	N/A	N/A	
CSI	N/A	N/A	N/A	N/A	N/A	N/A	
CWI	N/A	N/A	N/A	N/A	N/A	N/A	
EITC	N/A	N/A	N/A	N/A	N/A	N/A	
ISU	0	0	0	0	0	0	
LCSC	N/A	N/A	N/A	N/A	N/A	N/A	
NIC	N/A	N/A	N/A	N/A	N/A	N/A	
UI	N/A	N/A	N/A	N/A	N/A	N/A	

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

N/A. This request is for the discontinuance of programs.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. **This question is not applicable to requests for discontinuance.**

N/A

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. **This question is not applicable to requests for discontinuance.**

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.
- b. Describe how the proposed change will act to stimulate the state economy by advancing the field,

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providing research results, etc.

- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

N/A

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

N/A

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

N/A

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal

14. Is the proposed program in your institution's Five-Year plan? Indicate below. *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

N/A

15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally). *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

These option will be discontinued and have not accepted students for several years. The Electronics-Core will be discontinued and students will be accepted directly into Energy Systems programs. This will be done as an admissions practice and will not impact recruitment since students are recruited to programs rather than courses. Students will register in 1<sup>st</sup> year program classes rather than 1<sup>st</sup> year Electronics-Core. Advisors will assist students with registration to help them enroll in the right courses.

16. **Program Resource Requirements.** Using the *Excel spreadsheet* provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources

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and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).



**Program Resource Requirements.** Provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**A. REVENUE**

	FY		2012		FY		2013		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocation)	-\$287,018.08		\$287,018.08								\$0.00	\$0.00
2. Appropriated (New)											\$0.00	\$0.00
3. Federal											\$0.00	\$0.00
4. Tuition											\$0.00	\$0.00
5. Student Fees											\$0.00	\$0.00
6. Other (Specify)											\$0.00	\$0.00
<b>Total Revenue</b>	<b>-\$287,018.08</b>	<b>\$0.00</b>	<b>\$287,018.08</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

**B. EXPENDITURES**

	FY		FY		FY		Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Personnel	-\$276,524.35		\$276,524.35				\$0.00	\$0.00
2. Operating	-\$10,493.73		\$10,493.73				\$0.00	\$0.00
3. Equipment							\$0.00	\$0.00
4. Facilities							\$0.00	\$0.00
5. Other (Specify)							\$0.00	\$0.00
<b>Total Expenditures</b>	<b>-\$10,493.73</b>	<b>\$0.00</b>	<b>\$10,493.73</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Net Income (Deficit)</b>	<b>-\$276,524.35</b>	<b>\$0.00</b>	<b>\$276,524.35</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

*Ongoing is defined as ongoing operating budget for the program which will become part of the base.  
One-time is defined as one-time funding in a fiscal year and not part of the base.*

Program Proposal Budget Template  
(Baccalaureate, Graduate, Doctorate)  
March 7, 2012  
Page 1



NOTE: This funding will be shifted to the ESTEC Department.



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**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS  
OCTOBER 18, 2012**

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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
1	<b>LEWIS-CLARK STATE COLLEGE ANNUAL REPORT</b>	Information Item
2	<b>PRESIDENTS' COUNCIL REPORT</b>	Information Item
3	<b>IDAHO DIVISION OF VOCATIONAL REHABILITATION ANNUAL REPORT</b>	Information Item
4	<b>IDAHO DIGITAL LEARNING ACADEMY ANNUAL REPORT</b>	Information Item
5	<b>SCHOLARSHIP COMMITTEE RECOMMENDATIONS</b>	Motion to Approve
6	<b>2013 LEGISLATION</b>	Motion to Approve
7	<b>2012 DISTINGUISHED SCHOOLS &amp; ADDITIONAL YEARLY GROWTH AWARDS</b>	Information Item
8	<b>PRESIDENT APPROVED ALCOHOL PERMITS</b>	Information Item



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**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS**  
**OCTOBER 18, 2012**

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**SUBJECT**

Lewis-Clark State College (LCSC) Annual Progress Report

**APPLICABLE STATUTE, RULE, OR POLICY**

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

**BACKGROUND/DISCUSSION**

This agenda item fulfills the Board's requirement for LCSC to provide a progress report on the institution's strategic plan, details of implementation, status of goals and objectives and information on other points of interest in accordance with a schedule and format established by the Board's Executive Director.

President Fernandez will provide a 15-minute overview of LCSC's progress in carrying out the College's strategic plan. An outline of points to be covered is provided in Attachment 1.

**IMPACT**

LCSC's strategic plan, based on its assigned role and mission from the State Board and supportive of the State Board's own strategic plan, drives the College's integrated planning, programming, budgeting, and assessment cycle and is the basis for the institution's annual budget requests and performance measure reports to the Division of Financial Management and the Legislative Services Office.

**ATTACHMENT**

Attachment 1 – Outline of LCSC Progress Report

Page 3

**BOARD ACTION**

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



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## LCSC Progress Report

Tony Fernández

October 17, 2012

Lewis-Clark  
STATE  
COLLEGE *Connecting Learning to Life*

## Mission

Lewis-Clark State College is a regional state college offering instruction in the liberal arts and sciences, professional areas tailored to the educational needs of Idaho, applied technical programs which support the local and state economy and other educational programs designed to meet the needs of Idahoans.

Lewis-Clark  
STATE  
COLLEGE

## Core Themes

*Connecting Learning to Life through*

- Academic Programs
- Professional-Technical Programs
- Community Programs

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STATE  
COLLEGE

## LCSC Planning Background

- LCSC's planning continues to:
  - Draw goals from SBOE Strategic Plan
  - Integrate planning-budgeting-assessment process
  - Focus on role and mission
  - Align organizational structure to mission
  - Be driven by integrated planning teams

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## LCSC Planning Process

- Phase I: Unit Action Plan preparation
- Phase II: Functional Area Review Groups convene and prioritize requests
- Phase III: President and VPs review committee reports
- Phase IV: Committee chair reports to President and VPs
- Phase V: Prioritization of planning requests and testimony to State Legislature
- Phase VI: Finalization of plans and budget submission

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## LCSC Strategic Initiatives

- PG-09: Faculty/Staff Compensation
- PG-15: NWCCU Accreditation
- PG-18: Course Fees
- PG-25: Developmental Courses
- PG-45: Student Health Services
- PG-29: Coeur d'Alene Long Range Planning
- PG-48: General Education Core Review
- PG-63: Strategic Enrollment Management

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### Legislative Requests for FY2014

- Employee salaries (CEC)
- Enrollment Workload Adjustment (EWA)
- Inflation (utilities, contracts, Library)
- Capital Equipment Replacement

**Lewis-Clark**  
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### Legislative Requests for FY2014

#### Complete College Idaho (CCI) initiatives

- CCI #1: Access
- CCI #2: Remediation Reform and Gen Ed

**Lewis-Clark**  
S T A T E  
C O L L E G E

### LCSC FY14 PBF Requests

#### Capital Projects

- Joint Facility (LC-UI-NIC) in Coeur d' Alene

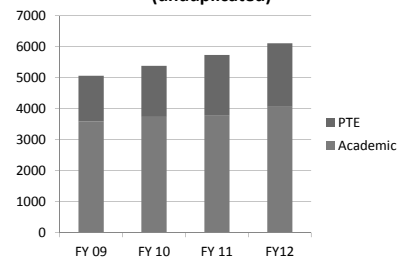
#### Alteration & Repair Projects

- Silverthorne upgrades + ADA
- Library computer server room fire system & HVAC
- Reid Centennial Hall chiller system
- Student Union Building roof
- Library chiller system
- Sam Glenn Complex Roof

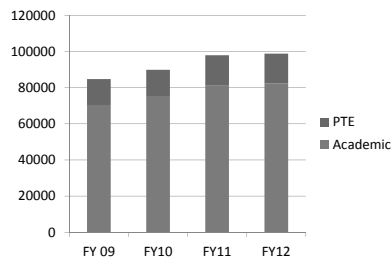
**Lewis-Clark**  
S T A T E  
C O L L E G E

### Annual Enrollment

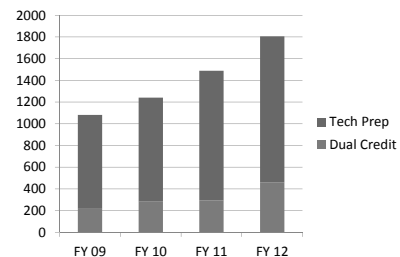
(unduplicated)



### Student Credit Hours

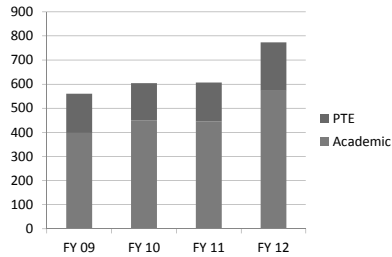


### Pre-College Headcount

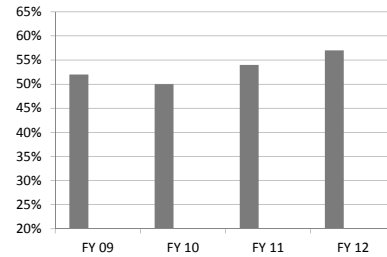




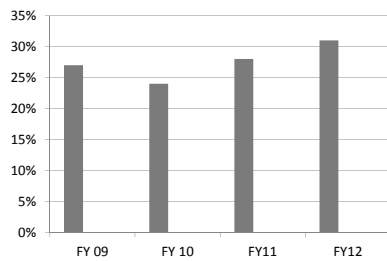
### Degrees/Certificates Awarded



### Retention Rate



### Graduation Rate



### Fall 2012 Enrollment

(10<sup>th</sup> Day)

• Total Enrollment	4652
• FTE	3215
• Freshman	907
• Pre-College	1060
• International	90

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COLLEGE

### Instructional Programs

- NCLEX-RN first-time pass rate 89%
- ARRT Radiologic Technology pass rate 100%
- Solid performance on teacher Praxis exams: 90% first-time pass rate
- Social Work Licensure first-time pass rate 88%
- Professional-Technical programs meeting workforce needs, positive placement rate 91%

**Lewis-Clark**  
STATE  
COLLEGE

### Outreach

- Community programs mission provided non-credit courses reaching thousands of citizens in the region



- Small Business Development Center (SBDC) served approximately 281 client businesses throughout the region
  - Provided approximately 2,040 consulting hours
  - Helped small businesses acquire and execute in loans
- SBDC provided approximately 46 customized training workshops to support economic development throughout Region II

**Lewis-Clark**  
STATE  
COLLEGE *Connecting Learning to Life*

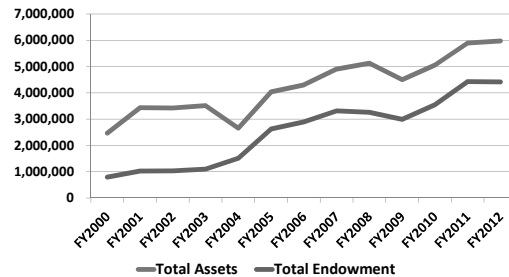


### Outreach

- LCSC ABE/GED programs produced 337 graduates last year.
- Excellent collaboration with Department of Correction
  - GED programs with Cottonwood (NICI) and Orofino (ICIO)
  - Special Education programs for inmates
  - Basic literacy and ELL classes
  - Family/Parenting Education for inmates/families
  - Education during incarceration has a dramatic impact on recidivism rates
  - LCSC supports Idaho Correctional Industries
  - Red Shirt program reduces recidivism and provides employment skills

**Lewis-Clark**  
 STATE  
 COLLEGE

### Advancement



### Research, Grants and Contracts

Existing grants providing \$11,000,000 direct support for Complete College Idaho:

- Access
  - Educational Talent Search
- Student Success/Retention/Completion
  - TRIO Academic Services, Albertson Student Success Program, LC Service Corps AmeriCorps
- Career Ready
  - NSF Advanced Technology Education, CAD/CAM computers and Truck Alignment System through RBEG

**Lewis-Clark**  
 STATE  
 COLLEGE *Connecting Learning to Life*

### LCSC Goals FY 2013

- Complete the LCSC Comprehensive 5-Year Strategic Plan.
- Continue "Campaign LCSC" and start the public phase.
- Continue to bring faculty and staff CEC further in line with accepted standards.
- Implement the second phase of Northwest Commission of Colleges and Universities accreditation process.
- Update student services within the LCSC organization.

**Lewis-Clark**  
 STATE  
 COLLEGE

### LCSC Goals FY 2013 (con't)

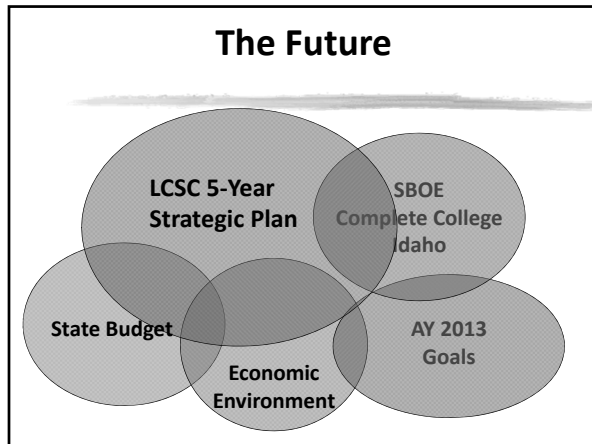
- Expand credentials that will contribute to the SBOE 60% goal.
- Collaborate with other universities and colleges to increase access, opportunities, and success in higher education.
- Expand opportunities to meet the needs of local industry through credit and non-credit educational programs.
- Improve student recruitment, retention, and completion.

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**PRESIDENTS' COUNCIL**

**SUBJECT**

Presidents' Council Report

**BACKGROUND/DISCUSSION**

President Bert Glandon, College of Western Idaho President, and current chair of the Presidents' Council will give the report from the most recent Presidents' Council meeting and answer questions.

The Presidents' Council met on September 4<sup>th</sup>, 2012. Items covered at this meeting included:

- Bonding for Deferred Maintenance
- Learning Outcomes
- Comparison of the Metrics for the Voluntary Framework of Accountability
- State-wide regent's degree: Connie Broughton from Washington State presented on Washington's program. Kathy Butler and Mark Stotler from West Virginia presented on West Virginia's programs.
- Reciprocity Agreements and out of state tuition waivers
- GED Program changes update

**BOARD ACTION**

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



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**IDAHO DIVISION OF VOCATIONAL REHABILITATION**

**SUBJECT**

Idaho Division of Vocational Rehabilitation (IDVR) Annual Report

**APPLICABLE STATUTE, RULE, OR POLICY**

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

**BACKGROUND/DISCUSSION**

This agenda item fulfills the Board's requirement for IDVR to provide a progress report on the agency's strategic plan, details of implementation, status of goals and objectives and information on other points of interest in accordance with a schedule and format established by the Board's Executive Director.

Don Alveshire, Administrator of the Division of Vocational Rehabilitation, will provide an overview of IDVR's progress in carrying out the agencies strategic plan.

**ATTACHMENTS**

Attachment 1 – Presentation

Page 3

**BOARD ACTION**

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# IDAHO DIVISION OF VOCATIONAL REHABILITATION

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## State Board of Education Presentation

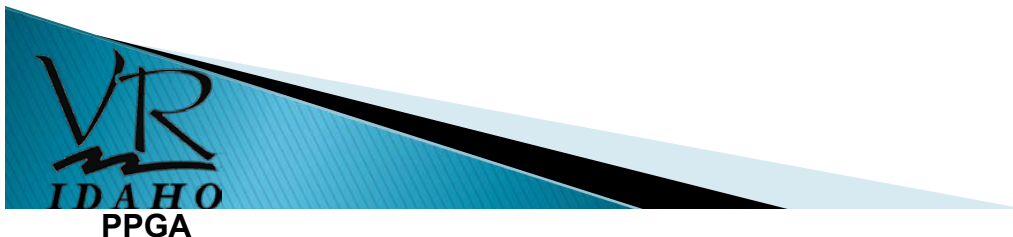
October 2012





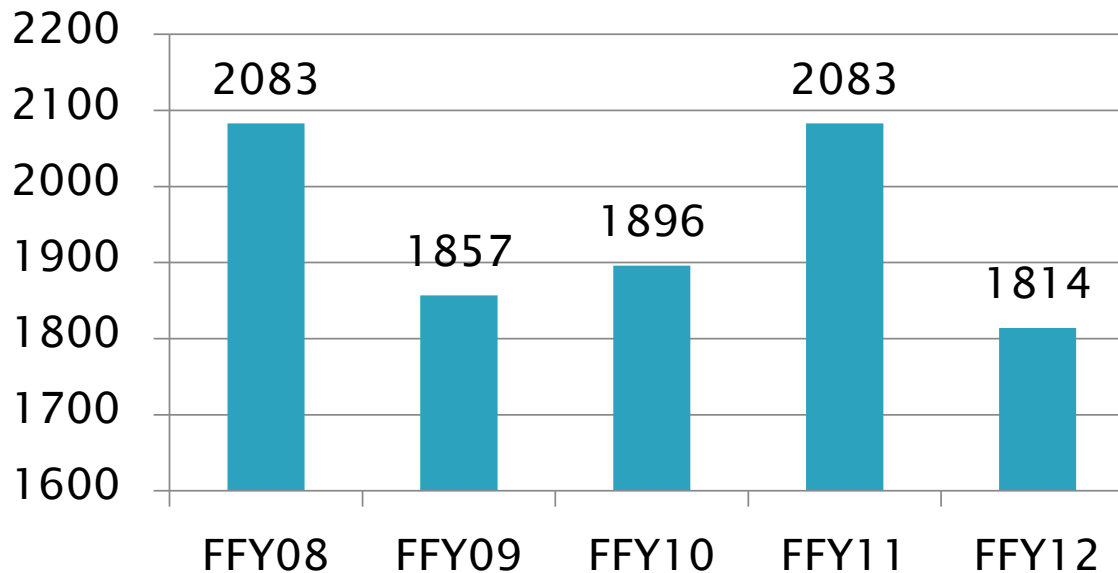
# 2012 VR Accomplishments

- ▶ Implemented WorkStrides program for IDVR customers.
- ▶ Completion of Motivational Interviewing training by all field staff.
- ▶ Increased counselor focus on active customer cases.
- ▶ Increased average wage rate for rehabilitated customers from \$10.66 in FFY 2011 to \$10.80 in FFY 2012.
- ▶ Met five out of seven federal indicators.





# Successful Rehabilitations

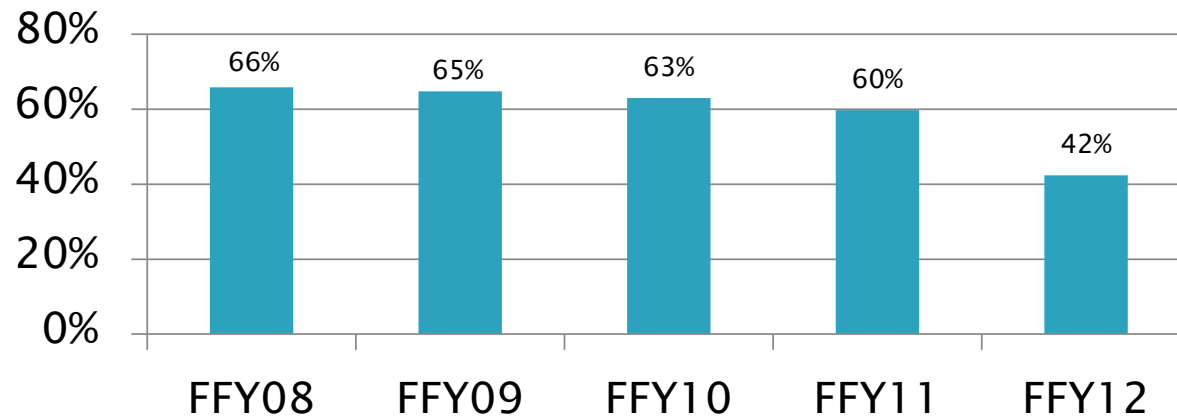


In FFY 2012, VR achieved 96% of its state established outcome of 1880 successful case closures. Federal benchmark is to meet the number of previous year rehabilitations or exceed by one (1).



# Rehabilitation Percentage

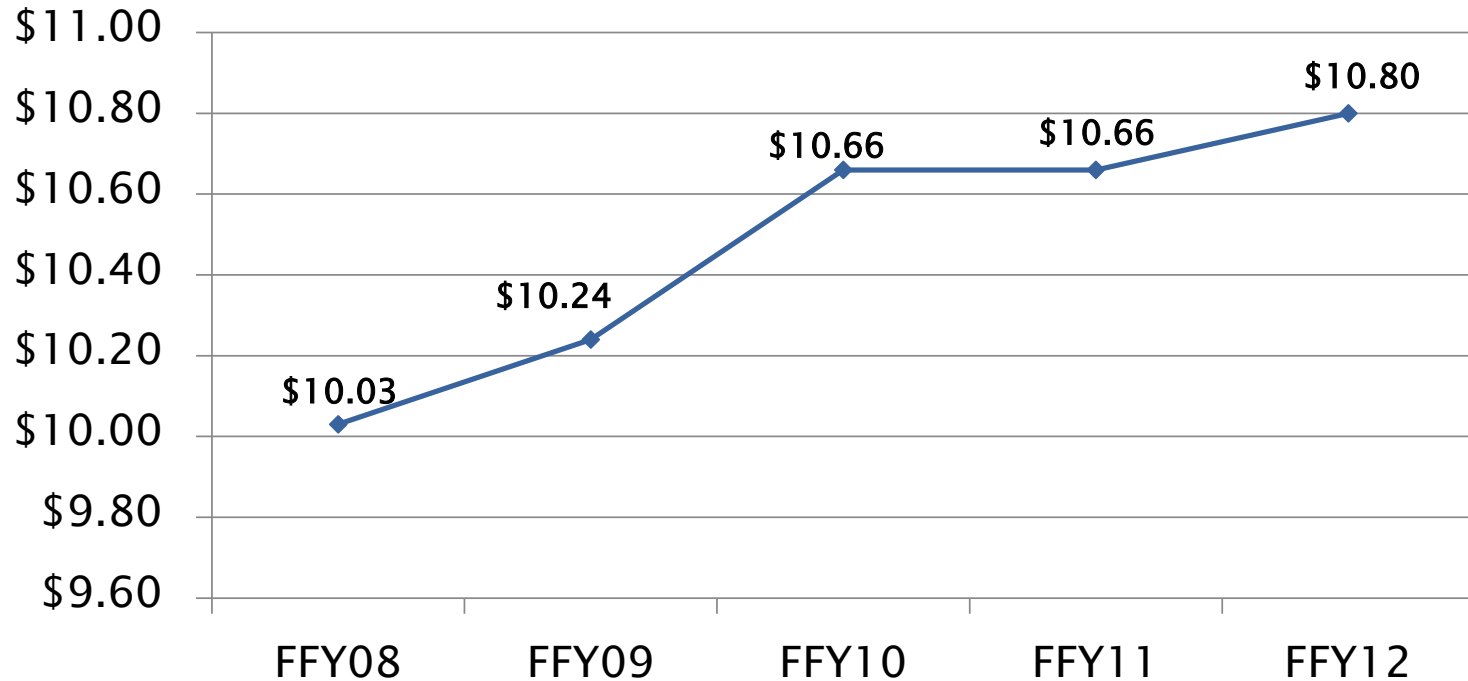
Federal Indicator: 55.8% of individuals who exit the VR program after receiving services who are determined to have achieved an employment outcome\*



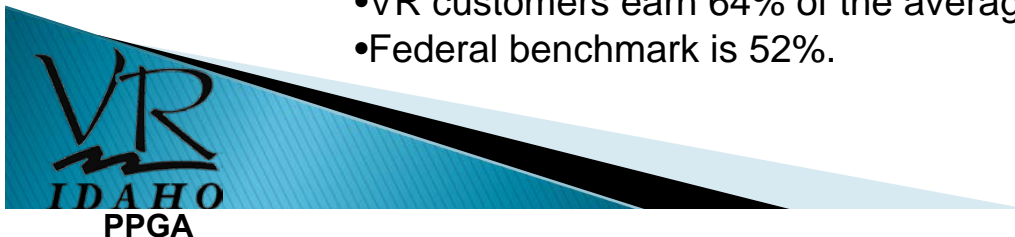
\*In 2012, VRC's began focusing significant service time to customers with active cases, resulting in an overall lower rehabilitation rate than previous years.



## VR Customer Average Hourly Wage



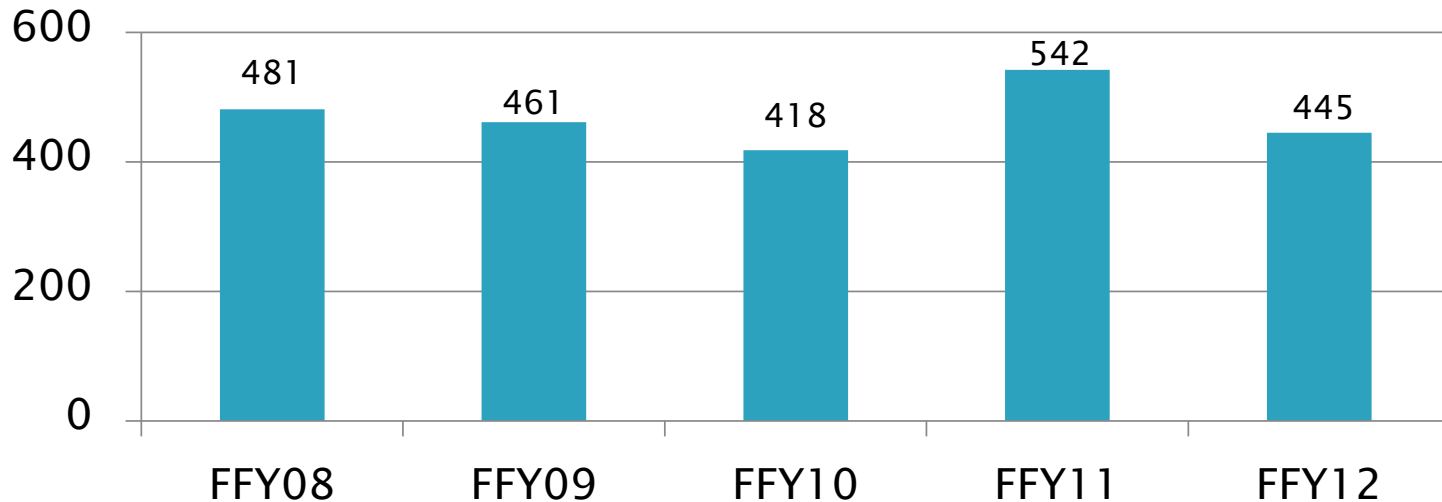
- VR customers consistently demonstrate an increase in wage-earning capacity after VR services.
- VR customers earn 64% of the average state wage (\$17.13).
- Federal benchmark is 52%.



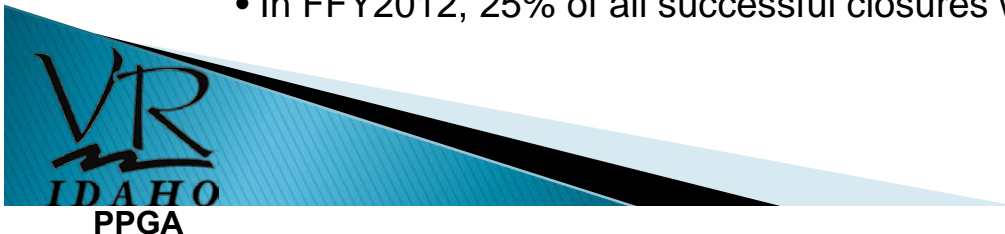


# Corrections

Measurement: The number of individuals involved with the correctional system exiting the VR program who achieved an employment outcome (benchmark: 400 per year).



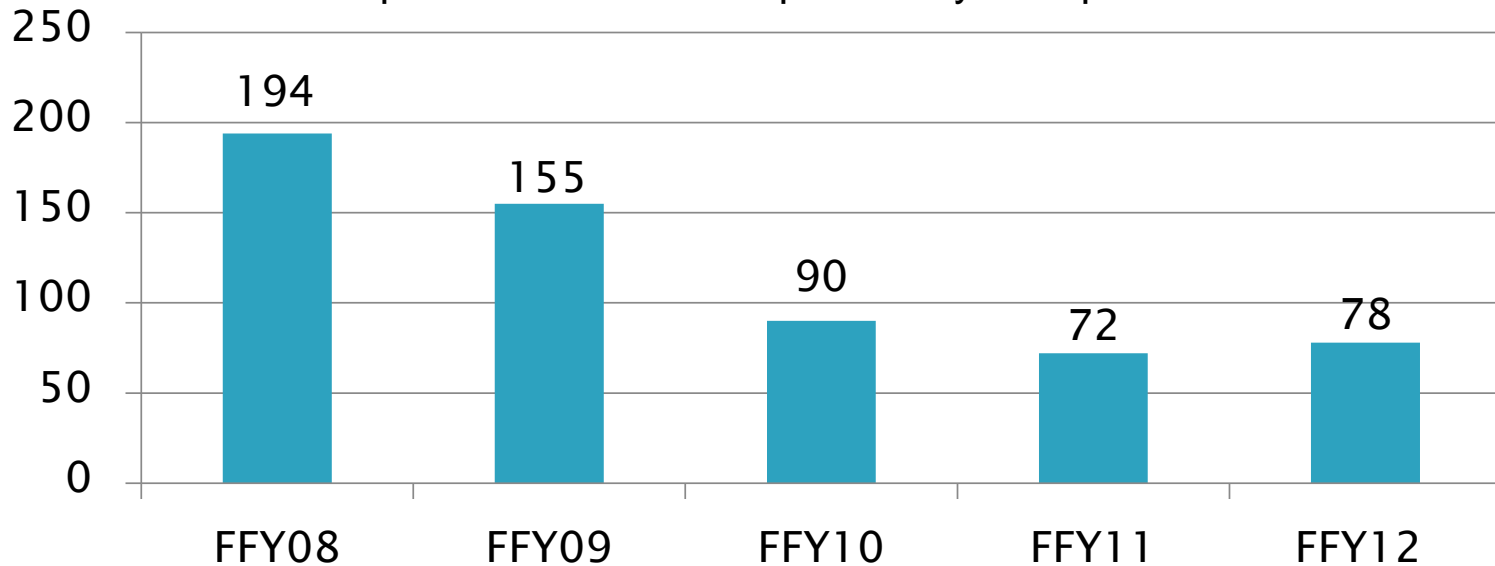
- Continued commitment in working with customers on probation or parole.
- Reduction in recidivism and positive impact on communities.
- Continued partnership with IDOC, including \$100,000 in funding assistance.
- In FFY2012, 25% of all successful closures were corrections customers.





## Supported Employment Rehabs

**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.

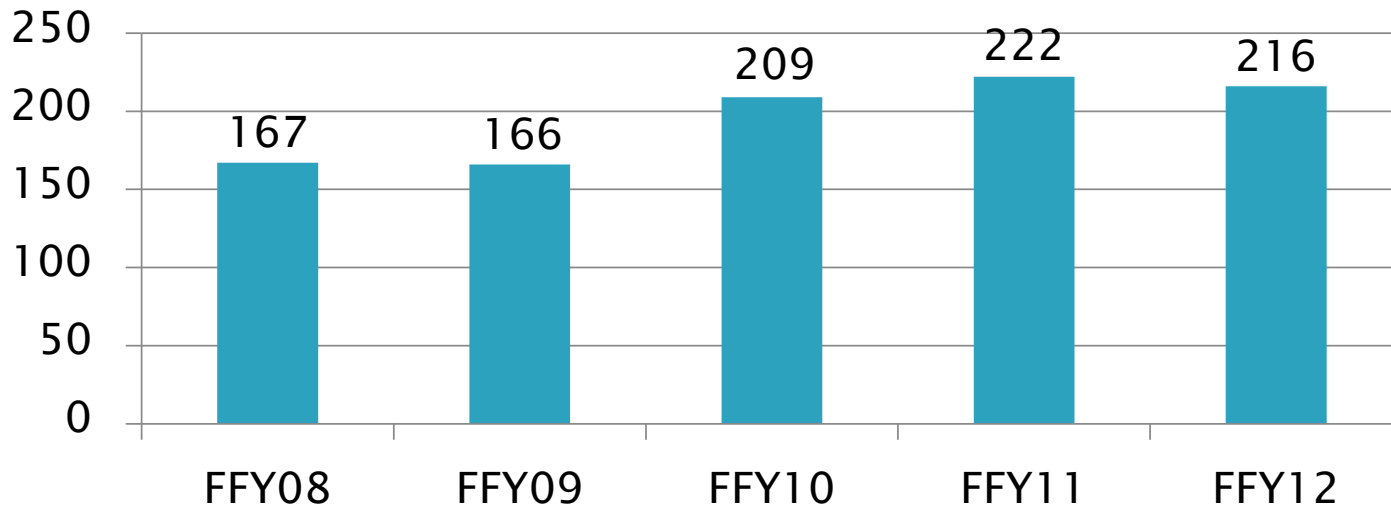


- Dramatic decrease in available EES and Medicaid Waiver funds over the last four years.
- External labor market factors disproportionately impact this customer group.



# Deaf and Hard of Hearing

BENCHMARK: The number of rehabilitations for this population will increase 6% between FFY 2011 and the completion of FFY 2013.

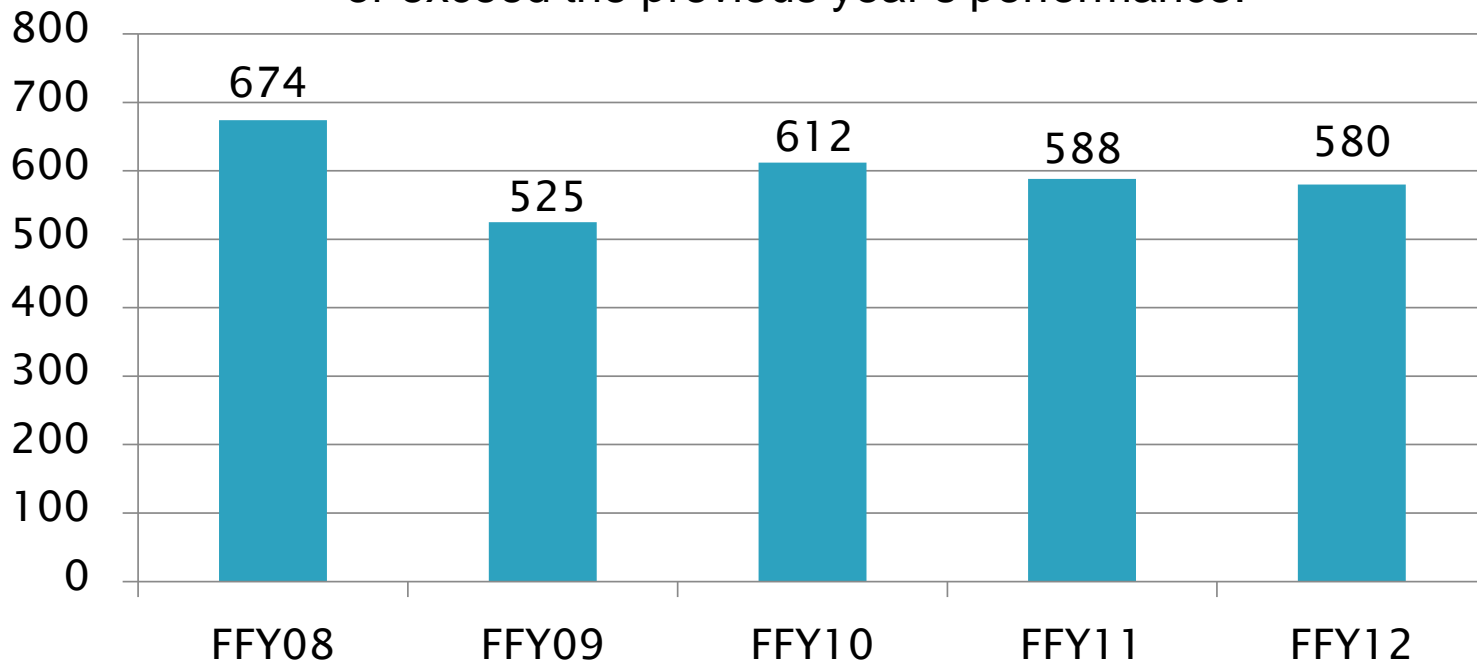


- Significant use of assistive technology to assist clients when working.
- Increased community awareness of deaf and hard of hearing customers.



# Transition-Age Youth

BENCHMARK: The number of transition age youth\* exiting the VR program who achieved an employment outcome shall be equal to or exceed the previous year's performance.

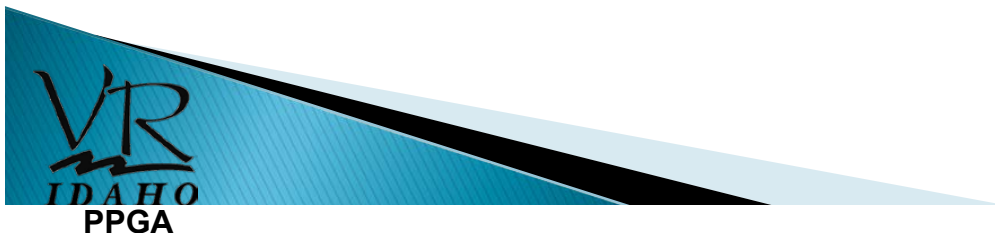


\*Customers ages 14–24 years old at application for VR services



**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS  
OCTOBER 18, 2012**

<b>Federal Standards and Indicators</b>	<b>FFY11</b>	<b>FFY12</b>	<b>Objective</b>
Number of closed cases with an employment outcome	2083	1814	Meet or exceed by 1
Percentage of cases closed after plan that are successful	59.8%	42.4%	55.8%
Percentage of rehabbed cases with a wage equal to or greater than the minimum wage	99.7%	99.4%	72.6%
Percentage of closed cases with a wage equal to or greater than the minimum wage with significant disabilities	99.7%	99.4%	64.2%
Ratio of successful customer wages to the average state wage	63%	64%	52%
Difference between the percentage of customers whose primary support is self-support at closure compared with at application	74	75.1	53
Ratio of minority to non-minority service rate	.962	.963	.80





# Region II Rehab of the Year

## Barriers :

- Lack of transferable skills/viable job history.
- Difficulty with emotional stability.
- Limited work relationships.

## Plan:

- OJT with Nez Perce Tribe.
- Long-term employment.

## Services:

- IDVR/Tribal Coordination.
- Training/testing fees..
- Tools.
- Clothing.
- Transportation assistance.

## Result:

- A+ Computer Certification.
- Full-time employment with Nez Perce Tribe..
- Wage=\$13.86/hour (48% wage increase from pre-VR involvement).
- Employer-sponsored health benefits.

Jesse





# Budget

\$236,200 in transfer funding requested for VR programs and services in FFY2013

- ▶ **Increase Business Outreach**
  - Direct marketing of available IDVR services to businesses statewide
  - Increased partnerships with business to increase employment placements for IDVR customers.
- ▶ **Funding for previous Renal Program staff**
  - Reallocation of Renal Program funds to Vocational Rehabilitation Program.
  - Maintain current staff levels to ensure continued quality services.
- ▶ **Increase high-school aged Transition Services**
  - Increase inter-agency and community partnerships.
  - Increase community job training programs statewide.
  - Increase statewide successful rehabilitation rates for transition-aged youth.





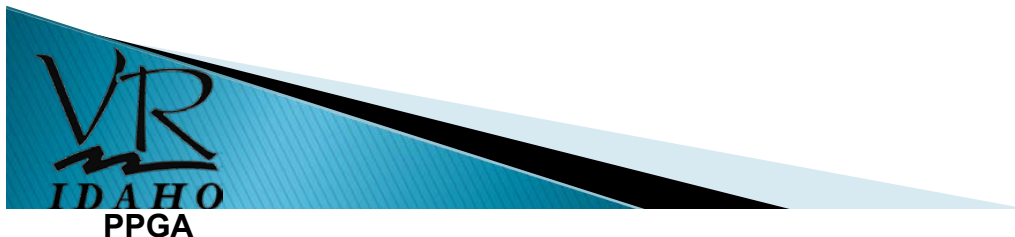
# Legislative Audit-VR Programs

▶ Finding:

Improvement needed to ensure eligibility requirements met under rehabilitation service grants.

▶ Corrective Action:

- Revision of Field Services Policy Manual.
- Initiating improved Quality Assurance process for customer services.
- Planned statewide staff training on all new policies and procedures (if approved by Legislature) to ensure statewide consistency and quality customer services.





# Region V Rehab of the Year

Lisa



## Barriers :

- Permanent physical limitations.
- Lack of education.
- Lack of transferable work skills.

## Plan:

- Formal training at Idaho State University.
- Employment in medical records.

## Services:

- Vocational counseling.
- Tuition/program fee assistance.
- Textbook funds.
- Certification exam fees.
- Transportation assistance.

## Result:

- Completed A.A.S. degree from ISU.
- Received national certification in R.H.I.T.
- Full-time employment at Bingham Memorial Hospital.
- Wage=\$13.26/hour (31% wage increase from pre-VR involvement).
- Employer-sponsored healthcare benefits.



# Extended Employment Services

## ▶ Successes

- Developed person centered funding model to increase customer informed choice.
- Streamlined wait-list process for EES customers.
- Supplemental and ongoing funding from Legislature: shorter wait-list time and increased customers served.

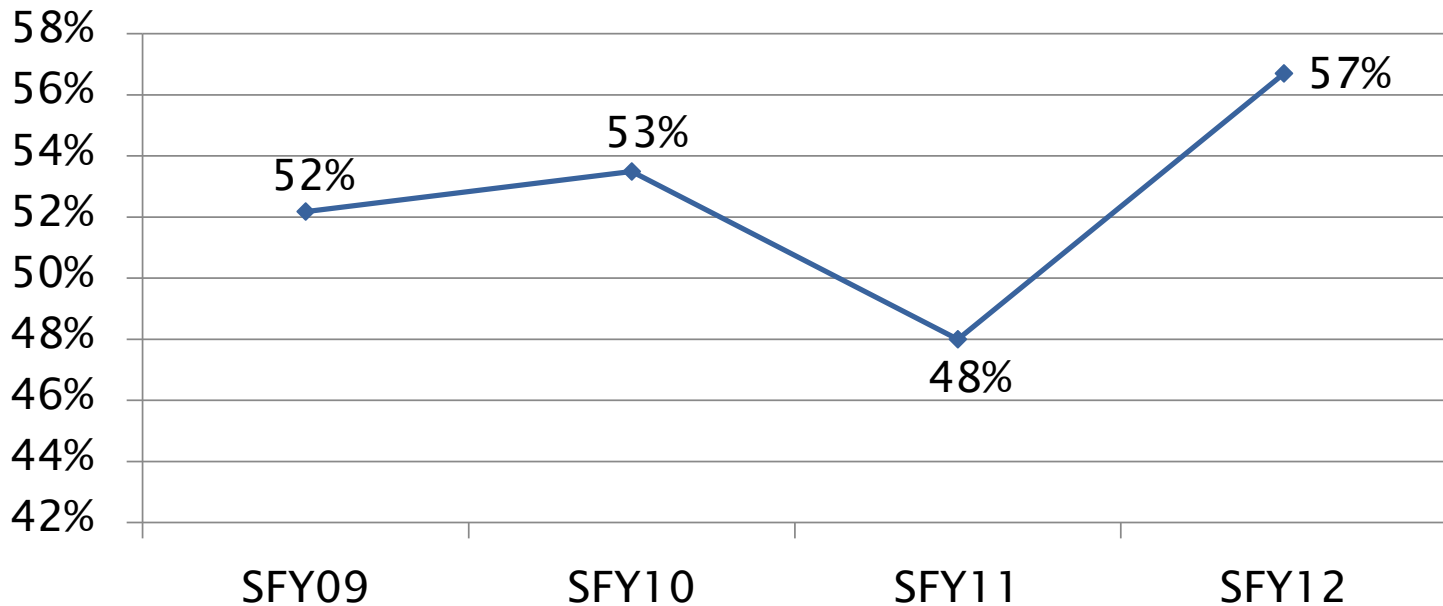
## ▶ Legislative budget increase request 2013

- Requested transfer of \$170,000 from Renal Program
- Increase reimbursement rate for CRP's.
- Increase direct customer service to continue to reduce customer wait-list time and increase EES services.



## Extended Employment Services

BENCHMARK: 53% percent of CSE customers served through the Extended Employment Services program.





## Council for the Deaf and Hard of Hearing

### ▶ **Council Goals:**

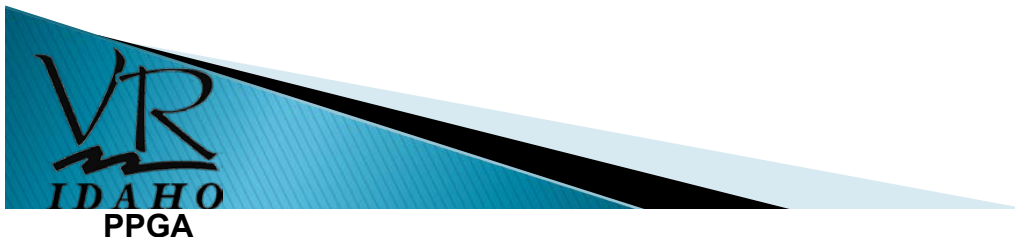
- Increase opportunities for deaf and hard of hearing Idahoans.
- Increase community awareness of deaf and hard of hearing individuals.
- Improve inter-agency cooperation and consultation.
- Provide network of publicly available information.
- Continual program evaluation based on customer needs.

### ▶ **Achievements:**

- Interagency partnerships with Infant-Toddler program, IESDB, Commission on Aging, Idaho Assistive Tech Project.
- Social Media Outreach.
- Created database of assistive technology available in Idaho for demonstration and loan to deaf and hard of hearing individuals.

### ▶ **Legislative budget increase request 2013:**

- Requested \$16,500 of transfer funds from state Renal Program for interpreter services and communication accommodations.

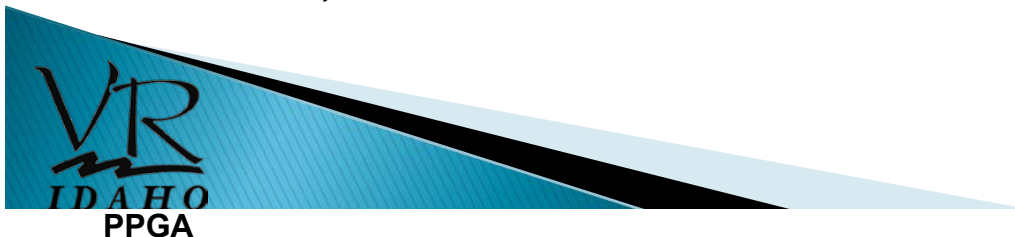




# State Renal Program

Phase out of State Renal Program as approved by the Legislature and Governor effective June 2013.

- ▶ Implemented based on an Office of Performance Evaluations audit.
- ▶ VR assisting with transition and coordination services for current renal customers:
  - Transportation resources.
  - Medication resources.
- ▶ Requested reallocation of Renal Program funds:
  - \$170,000 to EES program.
  - \$236,000 to VR programs.
  - \$16,500 to CDHH.





# Fiscal Activity

- ▶ Recapture of Social Security monies
  - Expanded use of computer-based tracking program.
  - Significant decrease in agency time and costs.
  - **\$517,525** in reimbursed SSI and SSDI funds for FFY2012.
  - Increased from \$446,810 in FFY2011 (14% increase in FFY2012).
- ▶ Sequestration
  - 7.6% reduction in federal grant funding for VR programs.
  - 8.4% reduction in EES, training grants, and Independent Living program funds.
  - Potential negative impact regarding customer access to comparable benefits and services.
- ▶ Zero-Based Budgeting
  - Agency developing a plan as mandated.

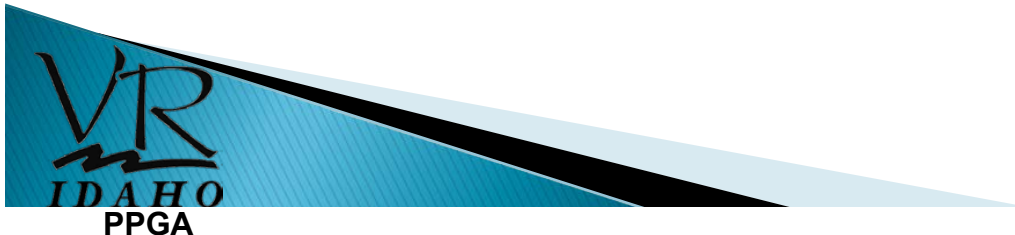




# Legislative Audit–Fiscal Findings

## 10 audit findings

- One finding specific to VR program.
- Nine specific to fiscal procedures.
- Majority addressed and rectified prior to final submission of corrective action plan.





# Region VIII Rehab of the Year

## Barriers:

- Physical limitations.
- Minimal education.
- Transportation.

Sheila

## Plan:

- Complete on-line Bachelor of Science Degree.
- Part-time high school Greek instructor.

## Services:

- Vocational and personal counseling.
- Tuition and book funding assistance.
- Driving test.
- Challenge exam and CLEP tests cost assistance.
- Assistive technology.
  - Van conversion.
  - Netbook.



## Outcome:

- Completion of B.S. Degree.
- Part-time H.S. Latin and Greek teacher
- Private tutor.
- Hourly wage=\$18.46 as a teacher.
- Goal of completing PhD studies.



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**IDAHO DIGITAL LEARNING ACADEMY**

**SUBJECT**

Idaho Digital Learning Academy Annual Report (IDLA)

**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/DISCUSSION**

Pursuant 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.

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 courses delivered by highly qualified faculty assists the state in preparing Idaho students to meet Idaho's high school graduation requirements, Idaho content standards, and the increased demand from colleges and industry.

In 2011, Senate Bill 1184 restructured IDLA's funding formula (Section 33-1020, Idaho code) to reduce state appropriation for IDLA effective July 1, 2012. The revision to this Section eliminates IDLA's growth funding support which equates to approximately 80% of IDLA's total funding. Additionally, a minimum funding clause was created for Fiscal Years 2013 and 2014 to be enacted should IDLA's total revenue from State allocation and Idaho school district contracts drop below \$3.5 million.

**IMPACT**

IDLA served 17,649 enrollments for 2011-2012 which is a 29.98% increase over last year. 99% of the school districts in Idaho participated during the 2011-2012 school year. The number one reason for taking IDLA courses is scheduling conflicts. Other reasons include: course not offered; advanced placement; dual credit; early graduation; foreign languages; and credit recovery.

**ATTACHMENTS**

Attachment 1 – IDLA Presentation Information

Page 3

Attachment 2 – 2012-2013 Fee Policy Statement

Page 4



**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS**  
**OCTOBER 18, 2012**

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Attachment 3 – Acceptable Use Policy  
Attachment 4 – Accreditation Confirmation

Page 6  
Page 12

**BOARD ACTION**

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



**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS  
OCTOBER 18, 2012**

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**IDAHO DIGITAL LEARNING ACADEMY PRESENTATION INFORMATION**

**NAMES OF PRESENTERS & TITLES**

Dr. Cheryl Charlton, Chief Executive Officer  
Mike Caldwell, Director of Program Development  
Ryan Gravette, Director of Technology

**PRESENTATION TOPICS**

2011-2012 Update



## **2012-2013 IDLA FEES POLICY STATEMENT**

### **FEES FOR IDAHO DIGITAL LEARNING ACADEMY:**

The fee schedule for 2012-2013 is determined upon a per-enrollment basis. An "enrollment" is defined as one (1) student enrolled into one (1) IDLA course. IDLA enrollment fees apply to all courses offered through IDLA.

All IDLA course fees are paid by the district directly to IDLA. IDLA policy does not dictate the collection of fees from students/parents. District policy will determine if fees will be paid by the student/parent to the District. IDLA does not invoice or collect fees from students or parents.

### **IDLA PER-ENROLLMENT COST:**

For Summer 2012 and Fall 2012, cost for one (1) enrollment is \$75 for Idaho public school students. For Spring 2013, the cost for one enrollment is \$100.

### **PRIVATE SCHOOL AND OUT-OF-STATE STUDENT FEES:**

For all semesters in 2012-2013, the cost for one (1) enrollment is \$400.

### **ISAT REMEDIATION COURSES:**

Cost for one (1) enrollment is \$75 for Idaho public school. For Spring 2013, the cost for one enrollment is \$100.

### **ADVANCED PLACEMENT/DUAL CREDIT COURSES:**

Cost for one (1) enrollment is \$75 for Idaho public school students. For Spring 2013, the cost for one enrollment is \$100.

Students are responsible for any fees that may be charged by universities to receive college credit for Dual Credit Courses. Additionally, students are responsible for any fees that may be charged by the College Board to take the Advanced Placement Exam. Advanced Placement and Dual Credit courses may require additional textbooks (see below).

### **SCHOLARSHIPS:**

Scholarships are awarded through an application process which is submitted by the District Site Coordinator. Scholarship submissions should be based on the financial need of the parent/student and are only available for IDLA courses which are taken in addition to the student's full course load at the local school. Limited, partial scholarships are available for 2012-2013 at \$50 per enrollment.

### **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



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

**BILLING SCHEDULE:**

<b>Billing Sent to Districts:</b>	<b>Sessions Covered:</b>
March 15	January 16 week, February 12 week
May 15	Spring FLEX, custom sessions, and PAST DUE
August 15	Summer 9 week, Summer 12 week, and Summer FLEX
October 15	August 12 week, September 16 week, and custom sessions
January 15	November 12 week, Fall FLEX, and PAST DUE



## **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**

- *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 between students shall respect the privacy of all individuals and shall not contain personal information regarding 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 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 anytime 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;

**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 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.



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- 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 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



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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.



# Northwest Accreditation Commission

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

2011-2012

## CERTIFICATE OF ACCREDITATION

### Idaho Digital Learning Academy

is an accredited Distance Education for the school year 2011-2012 by the Commission on Schools of the Northwest Accreditation Commission with member schools in Alaska, Idaho, Montana, Nevada, Oregon, Utah, Washington, along with other geographical areas of the United States and the world. This school is recognized for promoting and maintaining a well-balanced education program and for meeting or exceeding standards considered essential for quality education.

First Year of Accreditation 2002

*The signatures below certify the authenticity of this document.*



Jerry Peacock, President



David G. Steadman, Executive Director



Leonard Paul, Associate Director





**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS**  
**OCTOBER 18, 2012**

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**SUBJECT**

Scholarship Committee Recommendations

**REFERENCE**

June 2012     The Board approved legislative ideas to be submitted through the Governor's Executive Agency Legislation process including an the Idea to amend Idaho Code governing state scholarship programs to ensure programs are relevant and effective in assisting Idaho students in completing postsecondary education and to streamline and improve efficiency of program administration.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures Section 33-43, 33-44, 33-46, and 33-56, Idaho Code  
Idaho Administrative code, IDAPA 08.01.05, 08.01.10, 08.01.12, 08.01.13

**BACKGROUND/DISCUSSION**

In January 2012, the Office of Performance Evaluations (OPE) for the Idaho Legislature published a report in 2012 entitled, "Reducing Barriers to Postsecondary Education," which focused primarily on barriers related to college access and affordability. The report noted that "among our neighboring states, Idaho ranks the lowest in terms of state and local financial aid per student. In fact, the ability to pay for college was consistently identified by our survey respondents and national literature as the most common barrier to pursuing postsecondary education. Whether it is access to financial aid and scholarships or insufficient grant amounts, paying for postsecondary education is a significant concern expressed to us by both counselors and students."

OPE's recommendation was that "the State Board of Education should work with the Legislature to increase the amount of need-based aid either through the creation of new scholarships or the reallocation of existing funds. The board should also analyze outcome data of scholarship recipients to better assess the impact scholarships have on the completion of postsecondary degrees and certificates."

First Lady Lori Otter and former State Board of Education President Curtis Eaton are co-chairs of the Board's ad hoc committee of educators, business professionals and elected officials who have conducted a comprehensive review of the scholarships managed by the Office of the State Board of Education. Over the past four months, the committee has evaluated the current eight aid programs and discussed potential changes to consolidate, streamline and increase the effectiveness of the scholarship program as a whole.

The recommendation of this committee is to consolidate six state-funded scholarship programs into one program, a modified version of the existing Opportunity Scholarship. The Governor's Cup, Gear Up, and Tschudy Family



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scholarships will remain unchanged. The Public Safety Officer and Armed Services scholarships will be combined into one section of code. The eligibility requirements for these two scholarships are in alignment with each other and will not be changed as part of the consolidation of the two sections.

**IMPACT**

The recommendation would redirect the funds previously appropriated for Grow Your Own, Minority/At Risk, Promise A & B, and the Student Loan Forgiveness to augment a revised Opportunity Scholarship. Combined appropriations for these programs is \$4,806,500, which would be added to the \$1,550,700 appropriated for the existing Opportunity Scholarship and result in a total of approximately \$6.4 million available for the amended Opportunity Scholarship.

**ATTACHMENTS**

Attachment 1 – Key Principles of State Scholarship Programs	Page 3
Attachment 2 – Committee Recommendations	Page 4
Attachment 3 – Scholarship Budget and Descriptions	Page 7

**STAFF COMMENTS AND RECOMMENDATIONS**

Board staff has worked closely with the Scholarship Committee to provide information and background to guide discussion. Staff brought in representatives from the Western Interstate Commission for Higher Education to provide the committee with perspectives from other states' efforts to improve scholarship programs and present research on the effectiveness of scholarship programs. Staff assisted the committee in developing the guiding principles and in determining the recommendations to consolidate programs in order to maximum the funds available to aid students attending Idaho's institutions of higher education.

The changes recommended, if accepted, would require changes to Idaho Code and Administrative rule. The proposed changes are reflected in the proposed scholarship legislation in Tab 6. If approved by the Board the legislation will be forwarded to the legislature and would go into effect July 1, 2013. If approved by the legislature necessary administrative rule changes would be brought back to the Board in spring 2013.

**BOARD ACTION**

I move to accept the recommendations of the Scholarship Committee.

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



**Scholarship Review Committee  
Statement of Purpose and Key Principles  
October 2012**

**Statement of Purpose:** Substantial economic and social benefits accrue to the state because of an educated citizenry. Idaho's Scholarship program focuses on two purposes: providing access to postsecondary education and incentivizing students to complete postsecondary education.

**Key Principles:**

- Tie state scholarships and aid to state goals – 60% Complete College Idaho goal.
- Provide a smaller number of programs/awards but larger, more meaningful amounts.
- Simplify and consolidate, which may include redirecting funds from some programs to others
- Use a shared responsibility model that defines the state's role and the criteria for the students'/parents' role.
- Provide a need-based scholarship program with performance/success expectations including, but not limited to, GPA and credit completion requirements.
- Include students who are not eligible for significant need-based aid and who may not have academic achievement sufficient to qualify for most merit-based aid, but who have demonstrated a likelihood for success.
- Provide a scholarship program that includes participation for students at community colleges and technical schools.
- Consider ease of administration.
- Consider ease of navigation for students and families.
- Build transparency into the program.
- Use consistent data reporting to gauge the effectiveness of the program and adjust accordingly.
- Identify ways to increase funding for the program.



**Scholarship Review Committee  
October 2012**

**Program Recommendations:**

Tier One: Programs are mandated by requirements outside of state control and cannot be amended by the Scholarship Committee. However, the Committee would encourage those who manage these programs to focus their efforts to coordinate with state goals.

- Governor's Cup
- Tschudy Family Scholarship
- GEAR UP Idaho Scholarship

Tier Two: Programs are mandated by Idaho Statute and are targeted to specific groups.

Type of Scholarship	Program	Recommended Change
Targeted	<b>Freedom Scholarship</b> For dependents of Idahoans who gave their lives or were permanently disabled in service of state/country  Covers tuition, fees, living expenses, supplies at state institutions	Consolidate with Public Safety Officer
Targeted	<b>Public Safety Officer</b> For dependents of Idahoans who gave their lives or were disabled during service  Covers tuition, fees, living expenses, supplies at state institutions	Consolidate with Freedom Scholarship
Targeted	<b>Grow Your Own Teacher Scholarship (GYO)</b> Provides a career ladder for Idaho school district employees and volunteers to complete requirements for an associate/baccalaureate with bilingual or ESL endorsement or Native American students preparing to teach in school districts with a significant Native American student population.	Redirect \$
Need-based Targeted	<b>Minority/At Risk Scholarship</b> Intended to serve capable students who are at-risk for attending or completing college based on variety of factors.	Redirect \$
N/A – not a scholarship	<b>State Loan Forgiveness Program</b> For nurses and teachers  Pays for tuition and fees	Redirect \$ or Defer Recommendation



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Tier Three: Programs are controlled by Idaho Statute and have a broader reach.

<b>Type of Scholarship</b>	<b>Program</b>	<b>Recommended Change</b>
Merit-based	<b>Promise Category A Scholarship</b> For academic scholars and professional-technical students.  <u>Academic</u> <u>PTE</u> 3.5 GPA      2.8 GPA 28 on ACT      Take ACT/SAT or Compass	Redirect \$
Merit-based	<b>Promise Category B Scholarship</b> For all freshmen entering an eligible Idaho college or university for the first time and who graduated from an Idaho high school or its equivalent  3.0 GPA / score of 20 on ACT Full time enrollment Under 22 yrs old	Redirect \$
Combination need and merit	<b>Opportunity Scholarship</b> Designed to be a last dollars mechanism; meaning that a student must apply for federal financial aid and have a self or family contribution element before they would be eligible for the Opportunity Scholarship.  Requires full-time participation and maintenance of 2.0 GPA  Student has an identified contribution amount per year  Need is weighted at 70% and merit is weighted at 30%	Revise and increase funding w/redirected \$
N/A – not a scholarship	Work Study	Amend distribution formula to use resident headcount

**Additional Recommendations:**

Explore alternate investment options for the Opportunity Scholarship corpus.  
 Request additional funding for Idaho's scholarship program.  
 Request funding to administer state scholarship programs.  
 Support State Board of Education request for Institutional Research Director to support efforts to evaluate scholarship program effectiveness.



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**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS**  
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**SUBJECT**

Legislation for the 2013 Legislative Session

**REFERENCE**

June 2012

The Board approved legislative ideas to be submitted through the Governors Executive Agency Legislation process.

**BACKGROUND/ DISCUSSION**

The Board approved legislative ideas and authorized the Executive Director to submit additional ideas as necessary to the Governor's office through the Division of Financial Management at the June 2012 Board meeting. Each of the attached pieces of legislation have been submitted and approved to move forward through the process by the Governor's Office.

The following are descriptive summaries of the five (5) pieces of legislation being proposed:

**Scholarship Programs**

To amend Idaho Code governing state scholarship programs to ensure programs are relevant and effective in assisting Idaho students in completing postsecondary education and to streamline and improve efficiency of program administration.

The proposed amendments combine the Peace Officers and POW/MIA scholarships into one section, repeals the student education incentive loan forgiveness program section, repeals the Idaho Robert R. Lee Promise Scholarship Program section, repeals the Idaho Minority and "At-Risk" Student Scholarship Act, and modifies the Opportunity Scholarship sections for greater effectiveness and efficiency in the management of the program and delivery of the scholarship.

Fiscal Impact: Appropriations currently funding the repealed sections of code will be redirected into the Opportunity Scholarship program.

**Statewide Purchasing Contracts**

The legislative change in this bill removes the sunset clause on Idaho Code §67-5728 and allows the institutions of higher education defined in the statute to continue to have sole discretion, under the direction of the State Board of Education, for all items not relating to statewide purchasing contracts. During the 2010 legislative session, HB688 eliminated duplication of efforts in the state purchasing system that existed between the Division of Purchasing and the university and college purchasing departments. The original legislation included a sunset clause that provides for a review opportunity to ensure the new processes at the universities and colleges operated successfully. After a reviewing three years of purchasing practices made under this legislation, it is the consensus of all parties involved that the sunset clause should be removed to continue the efficiencies gained for the state.



Fiscal Impact: None

**Workman's Compensation Alignment**

This proposed legislation would align the workers compensation laws in the state so that postsecondary students receive the same workers compensation coverage that K-12 students receive while completing work experience credit hours. Under current Idaho law, postsecondary students receiving education credits for completing a work experience project are not covered under the university or college worker's compensation policy with the State Insurance Fund. Idaho Code also does not allow the university or college to purchase separate private workers compensation policies for students in these situations leaving the students without any form of coverage while working on behalf of the institution. These changes modify the existing statutes to allow a university or college to purchase coverage for students through the State Insurance Fund.

Fiscal Impact: The additional number of students that would be covered by these legislative changes is minimal. A university or college may see a slight increase in workers compensation premiums but the cost will be covered within existing budgets.

**Proprietary Schools and Postsecondary Educational Institutions**

Proposed changes would allow entities greater flexibility in establishing the surety bond requirements.

Fiscal Impact: None

**Public School Facilities Cooperative Funding Program**

This legislation would amend section 33-909, Idaho code to specify the all approved projects remain under the purview of the panel until finalized.

Fiscal Impact: None

**ATTACHMENT**

Attachment 1 – Scholarship Program	Page 9
Attachment 2 – Statewide Purchasing Contracts	Page 24
Attachment 3 – Workman's Compensation Alignment	Page 25
Attachment 4 – Proprietary Schools and Postsecondary Educational Education Institution Registration	Page 30
Attachment 5 – Public School Facilities Cooperative Funding Program	Page 31

**IMPACT**

Any Legislation not approved by the Board will be withdrawn from the Governor's legislative process. The Board office will continue to work with the Governor's Office, the Division of Financial Management and Legislative Services to finalize legislation prior to the start of the legislative session.



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**STAFF COMMENTS AND RECOMMENDATIONS**

Charter School Legislation: The three pieces of legislation regarding charter schools was approved and submitted by the Idaho Public Charter School Commission. While historically charter school growth rates have indicated that the removal of the cap will not result in an increased rate of growth, removal of the cap could potentially increase the number of applications for authorization to a point where staff's ability to properly manage the potential number of applications could be impacted. Additionally, the removal of the "one new charter school" per district could be a financial burden to small districts if a number of new charter schools were to be approved in the same year within their district.

Additional changes to legislation may be necessary as the Board Office works with the various governmental entities prior to finalizing and submitting to the legislature.

Staff recommends approval of all five pieces of legislation.

**BOARD ACTION**

**Scholarship Program**

I move to approve the legislation amending sections of Idaho code related to the Idaho scholarship programs administered by the State Board of Education in substantial conformance to the form submitted as Attachment 1 and to authorize the Executive Director to make additional changes as necessary in accordance with the accepted recommendations from the Scholarship Committee and the Governor's Office.

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

**Statewide Purchasing Contracts**

I move to approve proposed amendments to section 67-5728, Idaho code as submitted and to direct the Executive Director to make any non-substantive changes as necessary as the legislation moves forward through the Governor's legislative process.

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

**Workman's Compensation Alignment**

I move to approve proposed amendments to section 72-102 and section 72-205, Idaho code as submitted and to direct the Executive Director to make any non-substantive changes as necessary as the legislation moves forward through the Governor's legislative process.

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



**Proprietary Schools and Postsecondary Educational Institutions**

I move to approve proposed amendments to section 33-2406, Idaho code as submitted and to direct the Executive Director to make any non-substantive changes as necessary as the legislation moves forward through the Governor's legislative process.

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

**Public School Facilities Cooperative Funding Program**

I move to approve proposed amendments to section 33-909, Idaho code as submitted and to direct the Executive Director to make any non-substantive changes as necessary as the legislation moves forward through the Governor's legislative process.

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



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**Attachment 1**

An Act

Relating to scholarships; repealing section 33-3722, Idaho code, amending section 33-4301, Idaho code, amending section 33-4302, Idaho code, repealing section 33-4302A, Idaho code, repealing section 33-4303, Idaho code, repealing section 33-4304, Idaho code, repealing section 33-4305, Idaho code, repealing section 44-4306, Idaho code, repealing section 33-4307, Idaho code, repealing section 33-4308, Idaho code, repealing section 33-4309, Idaho code, repealing section 33-4310, Idaho code, repealing section 33-4311, Idaho code, repealing section 33-4312, Idaho code, repealing section 33-4313, Idaho code, repealing section 33-4314, Idaho code, repealing section 33-4315, Idaho code, amending Chapter 43 Title 33, Idaho code, by the addition of a new section 33-4303, Idaho code, repealing Chapter 46, Title 33, Idaho code, repealing Chapter 56, Title 33, Idaho code, amending section 44-4301, Idaho code.

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

SECTION 1. That Section 33-3722, Idaho code, be and the same is hereby repealed.

~~33-3722. Student education incentive loan forgiveness contract. (1) It is hereby declared that it is in the public interest to encourage and assist individuals who wish to pursue a teaching career or professional nursing career within this state to enroll in an Idaho postsecondary institution and to work in Idaho.~~

~~(2) Any Idaho student pursuing a teaching career may sign a loan forgiveness contract and promissory note for payment of all full-time undergraduate matriculation, facility and activity fees at any Idaho institution of higher learning who:~~

~~(a) Will maintain full-time student status and shall maintain a grade point average of 3.0 or better in the first two (2) semesters and for the remaining semesters; and~~

~~(b) Will pursue a program of study which will qualify the student to receive an Idaho teaching certificate upon completion of his studies; and~~

~~(c) Will pursue a teaching career within the state of Idaho for a minimum of two (2) years, which time requirement will commence upon obtaining a teaching position.~~

~~(3) Any Idaho student pursuing a licensed nursing career may sign a loan forgiveness contract and promissory note for payment of all undergraduate matriculation, facility and activity fees at any Idaho institution of higher learning who:~~

~~(a) Will maintain full-time student status and shall maintain a grade point average of 3.0 or better in the first two (2) semesters and for the remaining semesters; and~~

~~(b) Will pursue a program of study which will qualify the student to write the licensure examination approved by the board of nursing for registered nurse upon completion of his studies; and~~

~~(c) Will pursue a licensed professional nursing career within the state of Idaho for a minimum of two (2) years, which time requirement will commence within one (1) year after a professional nursing license is obtained.~~



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~~(4) Availability of student education incentive loan forgiveness contracts for potential teachers will be limited to sixteen (16) each year, with three (3) to be let by the University of Idaho, three (3) by Boise State University, three (3) by Idaho State University, three (3) by Lewis Clark State College, two (2) by North Idaho College and two (2) by the College of Southern Idaho; for potential registered nurses, contracts will be limited to thirteen (13) each year, with three (3) to be let by Boise State University, three (3) by Idaho State University, three (3) by Lewis Clark State College, two (2) by North Idaho College and two (2) by the College of Southern Idaho.~~

~~(a) Preference in selecting potential registered nurses will be given to applicants who indicate willingness to practice in rural Idaho.~~

~~(b) The length of each contract and promissory note shall not exceed a maximum of eight (8) years, and the beginning date and expiration date shall be specified in each contract.~~

~~(5) The state board of education may reassign unused contracts to other participating institutions. For purposes of reassignment of unused contracts, Eastern Idaho Technical College may be considered as a participating institution and may be awarded student education incentive loan forgiveness contracts for potential registered nurses.~~

~~(6) The student loan office of each institution of higher learning is directed to administer the loan forgiveness program provisions of this section, including the supplying of all necessary forms and the verifying, before each registration and at the expiration of the contract, of each person's compliance with the terms of the contract and collect and account for any necessary repayment of funds. Upon successful completion of the terms of the contract, the promissory note shall be forgiven. The state board of education shall annually determine the interest rate for new promissory notes. Loan repayments shall be allocated to support new student education incentive loan forgiveness contracts.~~

~~(7) Any violation of the terms of the contract shall obligate the person to repay all fees which the person as a student was allowed to waive, as determined by the affected institution.~~

~~(8) Each affected institution shall in its preparation of future budgets include therein costs resultant from fee loss for reimbursement from appropriations of state funds.~~

SECTION 2. That Section 33-4301, Idaho Code, be, and the same is hereby amended to read as follows:

33-4301. SHORT TITLE. This act may be cited as "The POW/MIA Scholarship Act of 1972 Scholarships and State Aid Act."

SECTION 3. That section 33-4302, Idaho code, be, and the same is hereby amended to read as follows:



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33-4302. SCHOLARSHIPS – STATE AID ARMED FORCES AND PUBLIC SAFETY OFFICER SCHOLARSHIPS. (1) The following individuals shall be eligible for the scholarship program provided for herein:

(a) Any spouse or child of any Idaho citizen who, while such person is or was a resident of the state of Idaho, has been determined by the federal government to be a prisoner of war or missing in action; or to have died of, or become totally and permanently disabled by, injuries or wounds sustained in action in any area of armed conflict in which the United States is a party; and

(b) Any spouse or child of any member of the armed forces of the United States who is stationed in the state of Idaho on military orders and who is deployed from the state of Idaho to any area of armed conflict in which the United States is a party and who has been determined by the federal government to be a prisoner of war or missing in action; or to have died of, or become totally and permanently disabled by, injuries or wounds sustained in action as a result of such deployment.

(c) Any spouse or child of a full-time or part-time public safety officer, as defined in subsection (d) of this section, employed by or volunteering for the state of Idaho or for a political subdivision of the state of Idaho, which public safety officer is or was a resident of the state of Idaho at the time such officer was killed or totally and permanently disabled in the line of duty, in 1975 or thereafter. The scholarship provided in this section shall not be available unless it is determined that:

(i) The death or disablement of the public safety officer occurred in the performance of the officer's duties;

(ii) The death or disablement was not caused by the intentional misconduct of the public safety officer or by such officer's intentional infliction of injury; and

(iii) The public safety officer was not voluntarily intoxicated at the time of death.

(d) For purposes of this section:

(i) "Public safety officer" means a peace officer or firefighter, or a paramedic, emergency medical technician or first responder as those terms are defined in section 56-1012, Idaho Code.

(ii) "Volunteering" means contributing services as a bona fide member of a legally organized law enforcement agency, fire department or licensed emergency medical service provider organization.

(2) (a) To be eligible for the scholarship provided for herein, a child of a military member or a public safety officer must be a resident of the state of Idaho and must have completed secondary school or its equivalent in the state of Idaho. A child already born, or born after a military member or public safety officer is determined to be imprisoned or missing in action, or is killed or becomes totally and permanently disabled, shall be eligible for this scholarship;

(b) To be eligible for the scholarship provided for herein, the spouse of a military member or public safety officer must be a resident of the state of Idaho and must have been married to such person at the time the military member or public safety officer was determined to be imprisoned or missing in action, or was killed or became totally and permanently disabled. Provided however, that in the situation of disability, the spouse must be currently married to such person.



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(3) An eligible individual who applies for the scholarship provided for herein shall, after verification of eligibility, receive the scholarship and be admitted to attend undergraduate studies at any public institution of higher education or public professional-technical college within the state of Idaho without the necessity of paying tuition and fees therefor; such student shall be provided with books, equipment and supplies necessary for pursuit of such program of enrollment not to exceed five hundred dollars (\$500) per quarter, semester, intensified semester, or like educational period; such student shall be furnished on-campus housing and subsistence for each month he or she is enrolled full-time under this program and actually resides in such on-campus facility; provided, however, that such undergraduate educational benefits shall not exceed a total of thirty-six (36) months or four (4) nine (9) month periods. Provided further, that the initiation of such educational benefits shall extend for a period of ten (10) years after achieving a high school diploma or its equivalency, or for a period of ten (10) years after the event giving rise to the eligibility for the scholarship, whichever is longer.

(4) The eligible individual shall meet such other educational qualifications as such institution of higher education or professional-technical college has established for other prospective students of this state, as well as any additional educational qualifications established by the state board of education and board of regents of the university of Idaho.

(5) Application for eligibility under this section shall be made to the state board of education and the board of regents of the university of Idaho or the state board of vocational-technical education. The board shall verify the eligibility of the applicant and communicate such eligibility to such person and the affected institution or college.

(6) Affected institutions shall in their preparation of future budgets include therein costs resultant from such tuition, fee, book, equipment, supply, housing and subsistence loss for reimbursement thereof from appropriations of state funds.

(7) For the purposes of this section, a member of the armed forces of the United States or public safety officer is considered totally and permanently disabled if at the time of application a current disability determination made by the United States social security administration is in effect with respect to such individual.

(8) The state board of education and board of regents of the university of Idaho may adopt rules to implement and administer the scholarship program provided for in this section.

SECTION 4. That Sections 33-4302A through 33-4315, Idaho code, be, and the same are hereby repealed.

~~**33-4302A. Public safety officer scholarships – State aid.** (1) Any spouse or child of a full-time or part-time public safety officer, as defined in subsection (6) of this section, employed by or volunteering for the state of Idaho or for a political subdivision of the state of Idaho, which public safety officer is or was a resident of the state of Idaho at the time such officer was killed or totally and permanently disabled in the line of duty shall be admitted to attend undergraduate studies at any public institution of higher education or public professional technical college within the state of Idaho without the necessity of paying tuition and fees therefor. Said persons shall be provided by the institution or college with books, equipment and supplies necessary for pursuit of the person's chosen program of enrollment not to exceed the actual cost therefor, or five~~



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~~hundred dollars (\$500), whichever is less, per quarter, semester, intensified semester, or like education period. Said person shall be provided with the institution or college's published normal on-campus residential facility housing and meals program for each month the person is enrolled full time under this statute and continues to actually reside in such on-campus residential facility. Provided however, that the undergraduate educational benefits provided for in this section shall not exceed a total of thirty-six (36) months or four (4) nine-month periods; provided further, that such educational benefits shall not extend beyond ten (10) years following the date the person receives a high school diploma, a high school equivalency diploma, a special diploma or a certificate of high school completion, or beyond the date such person turns thirty (30) years old, whichever comes first.~~

~~(2) (a) To be eligible for the scholarship provided for herein, a child of a public safety officer must be a resident of the state of Idaho and must have completed a secondary school or its equivalent in the state of Idaho. A child already born, or born after a public safety officer is killed or becomes totally and permanently disabled, shall be eligible for this scholarship.~~

~~(b) To be eligible for the scholarship provided for herein, the spouse of a public safety officer must be a resident of the state of Idaho and must have been married to such person at the time the public safety officer was killed or became totally and permanently disabled. Provided however, that in the situation of disability, the spouse must be currently married to such person.~~

~~(3) The eligible individual shall be required to meet the educational qualifications as such institution of higher education or professional-technical college as established for other prospective students of this state, as well as any additional educational qualifications established by the state board of education and board of regents of the university of Idaho. Application for eligibility under this section shall be made to the state board of education and board of regents of the university of Idaho. The board shall verify the eligibility of such person and communicate such eligibility to the person and the affected institution or college.~~

~~(4) Affected institutions and colleges shall, in their preparation of future budgets, include therein costs resulting from such tuition, fees, housing, meals, books, equipment and supplies for reimbursement thereof from appropriations of state funds.~~

~~For the purposes of this section, a public safety officer employed by or volunteering for the state of Idaho or for a political subdivision of the state of Idaho is considered totally and permanently disabled if at the time of application a current disability determination made by the United States social security administration is in effect with respect to such individual.~~

~~(5) The scholarships provided in this section shall be available for the spouse or children of public safety officers who were killed or totally and permanently disabled in 1975 or thereafter.~~

~~(6) For purposes of this section:~~

~~(a) "Public safety officer" means a peace officer or firefighter, or a paramedic, emergency medical technician or first responder as those terms are defined in section 56-1012, Idaho Code.~~

~~(b) "Volunteering" means contributing services as a bona fide member of a legally organized law enforcement agency, fire department or licensed emergency medical service provider organization.~~



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~~(7) The scholarship provided in this section shall not be available unless it is determined that:—~~

~~(a) The death or disablement of the public safety officer occurred in the performance of the officer's duties;—~~

~~(b) The death or disablement was not caused by the intentional misconduct of the public safety officer or by such officer's intentional infliction of injury; and—~~

~~(c) The public safety officer was not voluntarily intoxicated at the time of death.—~~

~~(8) The state board of education and board of regents of the university of Idaho may adopt rules to implement and administer this scholarship program.—~~

SECTION 3. That section 33-4303 through 33-4315, Idaho code, be and the same is hereby repealed.

~~**33-4303. Short title.** The scholarship program provided for in [sections 33-4303](#) through [33-4315](#), Idaho Code, shall be known and cited as the "Idaho Robert R. Lee Promise Scholarship Program."—~~

~~**33-4304. Public policy.** The legislature hereby recognizes and declares that substantial economic and social benefits accrue to the state because of an educated citizenry, and that the encouragement of the state's most talented Idaho students to enroll in Idaho postsecondary educational institutions is an important element for assuring the future leadership for the state.—~~

~~**33-4305. Purposes.** The purpose of this act is: (1) To establish a state scholarship program for the most talented Idaho secondary school graduates or the equivalent, consisting of category A students with outstanding academic qualifications and category B students with a cumulative grade point average for grades nine (9) through twelve (12) of 3.0 or better or achieving an ACT score of 20 or better or who become eligible after the student's first semester or who meet any other criteria as may be established by the state board of education and the board of regents of the university of Idaho, who will enroll in undergraduate nonreligious academic and professional-technical programs in eligible postsecondary institutions in the state; and—~~

~~(2) To designate the state board of education and the board of regents of the university of Idaho as the administrative agency for the state scholarship program.—~~

~~**33-4306. Definitions.** As used in this act, unless the context otherwise requires: (1) "Eligible postsecondary institution" means a public postsecondary organization governed or supervised by the state board of education, the board of regents of the university of Idaho, a board of trustees of a community college established pursuant to the provisions of [section 33-2106](#), Idaho Code, or the state board for professional-technical education or any educational organization which is operated privately and not for profit under the control of an independent board and not directly controlled or administered by a public or political subdivision. A public or private educational organization becomes eligible to participate in category B grant awards if the organization agrees to match awards granted to each eligible category B student. If an institution declines to match awards, an eligible student will receive the state portion of the award to that institution.—~~



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~~(2) "Educational costs" means student costs for tuition, fees, room and board, or expenses related to reasonable commuting, books and such other expenses reasonably related to attendance at a postsecondary educational institution.—~~

~~(3) "Student" means an individual resident student as defined in [section 33-3717B](#) or 33-2110B, Idaho Code, enrolled full time and carrying a sufficient number of credit hours, or their equivalent, to secure an individual's first degree, certificate, diploma or less, toward which the individual is working, in no more than the number of semesters, or equivalent, normally required by the eligible postsecondary institution in the program in which the individual is enrolled and provided that the baccalaureate degree, certificate, diploma or lesser program requires at least six (6) months or equivalent of consecutive attendance. A student engaged in a four (4) year baccalaureate program shall not be terminated from this scholarship program by having earned an intermediate degree, certificate or diploma.—~~

~~(4) "Enrollment" means the establishment and maintenance of an individual's status as a student in an eligible postsecondary institution, regardless of the term used at the institution to describe such status.—~~

~~(5) "Eligible category A student" means any individual who declares his intention to matriculate in an eligible postsecondary institution in the state of Idaho during the educational year immediately following:—~~

~~(a) The individual's completion of secondary school or its equivalent in the state of Idaho; or—~~

~~(b) The individual's graduation from an accredited secondary school, or completion of secondary school or its equivalent, outside of the United States, provided that the individual graduated from such school or successfully completed all requirements, and the individual and a parent of the individual were residents of the state of Idaho, within one (1) year of leaving the state due to the military status or job relocation of a parent.—~~

~~(6) "Eligible category B student" means any student, having completed secondary school or its equivalent in the state of Idaho, or outside of the United States if within one (1) year of leaving the state due to the military status or job relocation of a parent (a) the student completed such secondary school or its equivalent, and (b) the student and a parent of the student were residents of the state of Idaho, and who enrolls as a student in an eligible postsecondary institution in the state of Idaho prior to reaching twenty-two (22) years of age. To maintain eligibility a student must achieve and maintain a 2.5 cumulative grade point average while enrolled in an eligible postsecondary institution. Students meeting the requirements of this subsection who were not eligible for a grant in the first term of postsecondary education and who achieve and maintain a 2.5 cumulative grade point average based on a 4.0 system in an eligible postsecondary institution will become eligible for grant payments in subsequent school terms.—~~

~~(7) "Grant" means an award to an eligible student for matriculation in an eligible postsecondary institution in the state of Idaho.—~~

~~(8) "Educational year" means the period from July 1 of a year through June 30 of the succeeding year.—~~

~~(9) "Competitive examination" means standardized examination(s) measuring achievement administered annually on a voluntary basis on a specified date and at specified locations announced publicly.—~~



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~~(10) "High school record," for category A students, shall be defined by the state board of education and the board of regents of the university of Idaho and shall include, but need not be limited to, an individual's cumulative grade point average and such other measure that demonstrates difficulty of course load taken and extraordinary academic performance, and which for Idaho secondary school graduates is certified by an official of such secondary school.—~~

~~(11) "High school record," for category B students, shall be defined by the state board of education and the board of regents of the university of Idaho and shall include, but need not be limited to, an individual's secondary school cumulative grade point average or a composite score on the American college test (ACT).—~~

~~(12) "Cumulative grade point average" is defined as a student's cumulative grade point average for all courses taken in grades nine (9) through twelve (12) and calculated on a grade of A equals 4.0 points, a grade of B equals 3.0 points, a grade of C equals 2.0 points, a grade of D equals 1.0 point and a grade of F equals 0.0 points.—~~

~~**33-4307. Eligibility - Maximum amounts - Conditions.** A grant may be awarded to an eligible student for matriculation at an eligible postsecondary educational institution in the state of Idaho if:—~~

~~(1) The individual is accepted for enrollment as a full-time undergraduate or professional-technical student, as follows:—~~

~~(a) In the case of an individual beginning his first year or freshman year of postsecondary education, he has satisfied the requirements for admission and has enrolled in an eligible postsecondary institution.—~~

~~(b) In the case of an individual enrolled in an eligible postsecondary institution following the successful completion of the first term, he continues to meet the requirements of this act and has maintained such high standards of performance as may be required. Provided that high academic standards are maintained in accordance with requirements of this chapter, a student continues to be eligible when transferring from one (1) major program to another.—~~

~~(c) In the case of an individual transferring from one (1) eligible postsecondary institution in Idaho to another eligible postsecondary institution in Idaho, he continues to meet the requirements of this act, is accepted and enrolled at the eligible postsecondary institution to which he is transferring, and has maintained such high standards of performance as may be required.—~~

~~(2) The grant for category A students is as follows:—~~

~~(a) The grant payment to an individual per educational year for attendance on a full-time basis is not in excess of an amount determined annually by the state board of education or in excess of the total educational costs as certified by an official of the eligible postsecondary institution to be attended by the individual receiving the grant, whichever is less.—~~

~~(b) The total grant payments over a period of six (6) years to an individual may not exceed four (4) annual grants or the total educational costs for four (4) educational years completed as certified by an official of the eligible postsecondary institution or institutions attended by the individual receiving the grant, whichever is less.—~~

~~(c) The individual receiving such a grant signs an affidavit stating that the grant will be used for educational costs only.—~~



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- ~~(d) The grant is awarded on the basis of extraordinary performance in standardized, unweighted competitive examination and high school record.—~~
- ~~(e) The individual receiving the grant is not precluded from receiving other financial aid, awards, or scholarships, provided the total of the grant and such other financial aid, awards or scholarships does not exceed the total educational costs for attendance at an eligible postsecondary institution as certified by an official of the eligible postsecondary institution to be attended by the individual receiving the grant.—~~
- ~~(f) Grant payments shall correspond to academic terms, semesters, quarters or equivalent time periods at an eligible postsecondary institution; in no instance may the entire amount of a grant for an educational year, as defined in [section 33-4306\(8\)](#), Idaho Code, be paid to or on behalf of such student in advance.—~~
- ~~(g) The individual has complied with such rules as may be necessary for the administration of this act.—~~
- ~~(3) The grant for category B students is as follows:—~~
- ~~(a) The grant payment to an individual per educational year for attendance on a full-time basis is not in excess of an amount determined annually by the state board of education and the board of regents of the university of Idaho and not to exceed one thousand two hundred dollars (\$1,200) per year including the required match.—~~
- ~~(b) The total grant payments over a period of four (4) years to an individual may not exceed two (2) annual grants.—~~
- ~~(c) The individual receiving such a grant signs an affidavit stating that the grant will be used for educational costs only.—~~
- ~~(d) The grant is awarded on the basis of a high school record of a 3.0 grade point average or an ACT composite score of 20 or better and other criteria as may be established by the state board of education and the board of regents of the university of Idaho.—~~
- ~~(e) The individual receiving the grant is not precluded from receiving other financial aid, awards or scholarships except that category A student award recipients are not eligible for category B awards.—~~
- ~~(f) Grant payments shall correspond to academic terms, semesters, quarters or equivalent time periods at an eligible postsecondary institution; in no instance may the entire amount of a grant for an educational year, as defined in [section 33-4306\(8\)](#), Idaho Code, be paid to or on behalf of such student in advance. The first grant payments pursuant to this section for category B students shall be made in the fall of 2001 or in the first fall academic term following an appropriation and when moneys are available to implement the category B scholarship program, whichever date is later.—~~
- ~~(g) The individual has complied with such rules as may be necessary for the administration of this chapter.—~~
- ~~(h) All eligible postsecondary institutions will report annually to the state board of education and the board of regents of the university of Idaho the number of students for each term receiving a grant award and the number of awards that were matched by the institution.—~~



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~~**33-4308. Maximum number of grants.** (1) The total number of grants to eligible category A students shall not exceed one hundred (100) per year, nor a cumulative total number of grants of four hundred (400) outstanding at any given time.~~

~~(2) The total number of grants to category B students will be determined annually by the state board of education and the board of regents of the university of Idaho based on the number of eligible students, the individual award amount and the availability of funds.~~

~~**33-4309. Remittance in case of discontinued attendance.** A grant may be made annually for a period not to exceed an educational year. If the student discontinues attendance before the end of any semester, quarter, term, or equivalent, covered by the grant after receiving payment under this act, the eligible postsecondary institution shall remit, up to the amount of any payments made under this grant, any prorated tuition, fees or room and board balances to the state board of education and the board of regents of the university of Idaho. The student shall be required to remit, up to the amount of any other reasonable grant balances, such grant balances to the state board of education and the board of regents of the university of Idaho. In the event of extreme hardship as determined by the state board of education and the board of regents of the university of Idaho, a student may request waiver of remittance.~~

~~**33-4310. Discrimination prohibited.** The grants shall be awarded to eligible students without regard to any student's race, creed, color, sex, national origin, ancestry, age or area of academic competence.~~

~~**33-4311. Certifications of enrollment and termination of attendance of grant recipients.** Eligible postsecondary institutions which accept students under the provisions of this act shall be required to comply with procedures for certification of enrollment of recipients of such grants, and shall be required to certify the termination of attendance by recipients of such grants within thirty (30) days following such termination.~~

~~**33-4312. State board of education and board of regents of University of Idaho as administrative agency.** The state board of education and the board of regents of the University of Idaho is hereby designated as the administrative agency for the state scholarship program created by this act.~~

~~**33-4313. Duties of board.** The state board of education and the board of regents of the university of Idaho shall be responsible for:~~

~~(1) Supervision of the issuance of public information concerning the provisions of this act.~~

~~(2) Determination of recipients of grants made pursuant to the provisions of this act.~~

~~(3) Adoption of rules necessary for processing and approving applications from students.~~

~~(4) Determination of the procedures for payment of grants to recipients.~~

~~(5) Maintenance of fiscal controls and fund accounting procedures as may be necessary to assure proper disbursement of funds.~~

~~(6) Submission of annual reports to the governor and legislature.~~



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~~(7) Establishment of a reasonable and fair appeal procedure for those students and institutions who may have been adversely affected by the application procedures.—~~

~~(8) Holding a public hearing, prior to the adoption of rules, for the purpose of providing interested parties with the opportunity of discussing such rules.—~~

~~(9) Acceptance of funds from public and private sources, and such funds may be expended pursuant to appropriation to the state board of education and the board of regents of the university of Idaho for expenditure consistent with the purposes of this chapter.—~~

~~(10) In the event funds from the millennium fund are used for category B scholarships, the state board of education and the board of regents of the university of Idaho may establish additional eligibility criteria for scholarship recipients.—~~

~~**33-4314. Appointment of administrator and staff.** The state board of education and the board of regents of the University of Idaho may appoint an administrator and such other staff; the administrator shall perform such duties as are prescribed by the state board of education and the board of regents of the University of Idaho.—~~

~~**33-4315. No control of nonpublic institutions which accept grant recipients.** This act shall not be construed as granting any authority to the state board of education and the board of regents of the University of Idaho to control or influence the policies of any eligible nonpublic postsecondary institution or junior college because such institution accepts individuals who receive grants, nor to require any such institution to admit, or, once admitted, to continue in such institution any individual receiving a grant.—~~

SECTION 5. That Chapter 43, Title 33, Idaho code, be, and the same is hereby amended by the addition thereto of a New Section, to be known and designated as section 33-4303, Idaho code, and to read as follows:

33-4303. IDAHO OPPORTUNITY SCHOLARSHIP. (1) The purposes of this section are to:

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

(2) For the purposes of this section the following definitions shall apply:

(a) "Educational costs" means the dollar amount determined annually by the state board of education as necessary for student tuition, fees, room and board, books and such other expenses reasonably related to attendance at an eligible Idaho postsecondary educational institution.

(b) "Eligible Idaho postsecondary educational institution" means: A public postsecondary organization governed or supervised by the state board, the board of regents of the university of Idaho, a board of trustees of a community



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college established pursuant to the provisions of [chapter 21, title 33](#), Idaho Code, or the state board for professional-technical education; or any educational organization located in Idaho which is:

- (i) Operated privately;
- (ii) Classified as not-for-profit under the Idaho Code;
- (iii) Under the control of an independent board and not directly controlled or administered by a public or political subdivision; and
- (iv) Accredited by an organization recognized by the state board, as provided in [section 33-2402](#), Idaho Code.

(c) "Eligible student" means a student who:

- (i) Is an Idaho resident as defined in [section 33-3717B](#);
- (ii) Has or will graduate from an accredited high school or equivalent in Idaho as determined by the state board;
- (iii) Has enrolled or applied to an eligible Idaho postsecondary educational institution;
- (iv) Is a postsecondary, undergraduate student who has not previously completed a baccalaureate (bachelor's) degree or higher; and
- (v) Meets need and merit criteria as set by the state board

(d) "Shared Model of Responsibility" means a model set by the board to determine the required and expected contributions of the student, the student's family, and available federal financial aid.

(e) "Opportunity scholarship program" means the scholarship program described in this section and in the rules established by the state board.

(f) "State board" means the state board of education.

(3) The state board shall promulgate rules to determine student eligibility, academic and financial eligibility, a process for eligible students to apply, how award amounts shall be determined, how eligible students shall be selected, and when the awards shall be made, as well as other rules necessary for the administration of this section.

(4) An eligible student must: (a) Apply or have applied for federal student financial assistance available to an eligible student who will attend, or is enrolled in an eligible Idaho postsecondary educational institution;

(b) Meet need and merit criteria established by the state board in rule.

(5) Funds that are available for the opportunity scholarship program shall be used to provide scholarships based on a shared model of responsibility between the scholarship recipient and his or her family, the federal government and the participating eligible Idaho postsecondary educational institution that the recipient attends for covering the educational costs.

(6) The opportunity scholarship award shall not exceed the actual educational costs at the eligible Idaho postsecondary educational institution that the student attends. The amount of scholarship shall not exceed the educational costs established by the state board.



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(7) Award payments shall be made annually to an eligible Idaho postsecondary educational institution. In no instance may the entire amount of a award be paid to or on behalf of such student in advance.

(8) If an eligible student becomes ineligible for a scholarship under this chapter, or if a student discontinues attendance before the end of any semester, quarter, term or equivalent, covered by the award after receiving payment under this chapter, the eligible Idaho postsecondary educational institution shall remit, up to the amount of any payments made under this program, any prorated tuition, fees or room and board balances to the state board.

(9) There is hereby created an account in the state treasury to be designated the "opportunity scholarship program account."

(a) The account shall consist of moneys appropriated to the account by the legislature, moneys contributed to the account from other sources, and the earnings on such moneys. The executive director of the state board may receive on behalf of the state board any moneys or real or personal property donated, bequeathed, devised or conditionally granted to the state board for purposes of providing funding for such account. Moneys received directly or derived from the sale of such property shall be deposited by the state treasurer in the account.

(b) Earnings from moneys in the account or specified gifts shall be distributed annually to the state board to implement the opportunity scholarship program as provided for under this chapter.

(c) All moneys placed in the account and earnings thereon are hereby perpetually appropriated to the state board for the purpose described in subsection (9)(b) of this section. All expenditures from the account shall be paid out in warrants drawn by the state controller upon presentation of the proper vouchers. Up to fifty thousand dollars (\$50,000) of the annual earnings distribution to the state board may be used by the state board annually for administrative costs related to the implementation of the provisions of this chapter.

(d) Allowable administrative costs include, but are not limited to, operating expenses for the implementation and maintenance of a database, operating expenses to administer the program, personnel costs necessary to administer the program and costs related to promoting awareness of the program.

(e) Any unused annual funds shall be deposited into the "opportunity scholarship program account."

(f) Pending use, surplus moneys in the account shall be invested by the state treasurer in the same manner as provided under section 67-1210, Idaho Code. Interest earned on the investments shall be returned to the account.

(10) The effectiveness of the Idaho Opportunity Scholarship will be evaluated by the state board on a regular basis. This evaluation will include annual data collection as well as longer-term evaluations.

SECTION 6. That Chapter 43, Title 33, Idaho code, be, and the same is hereby amended by the addition thereto of a New Section, to be know and designated as section 33-4304, Idaho code, and to read as follows:



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33-4304. Scholarship Program Reporting Requirements. All eligible institutions participating in the scholarships and state aid programs shall report student level data on the effectiveness of said programs. The data reported shall be established by the State Board of Education.

SECTION 7. That Chapter 46, Title 33, Idaho code, be and the same is hereby repealed.

~~**33-4601. Short title.** This act shall be known and cited as the "Idaho Minority and 'At-Risk' Student Scholarship Act."~~

~~**33-4602. Public policy.** The legislature hereby recognizes and declares that substantial economic and social benefits accrue to the state because of an educated citizenry. The legislature further recognizes that certain talented students, because of their social, cultural and economic circumstances are "at-risk" of failing to obtain the education necessary to realize their potential and that encouraging these at-risk students to enroll in Idaho postsecondary educational institutions is an important element for assuring the future prosperity of the state.~~

~~**33-4603. Purposes.** The purposes of this chapter are:~~

~~(1) To establish a state scholarship program for talented "at-risk" persons who will enroll in undergraduate academic and professional-technical programs in postsecondary institutions in the state; and~~

~~(2) To provide Idaho postsecondary institutions a tool to improve the recruitment and graduation rates of Idaho residents who are at-risk persons as defined in this chapter.~~

~~**33-4604. Definitions.** As used in this chapter:~~

~~(1) "At-risk person" means any Idaho resident who meets three (3) or more of the following five (5) criteria:~~

~~(a) Is a potential first-generation college student;~~

~~(b) Is an individual with a disability as defined in 29 U.S.C. section 705;~~

~~(c) Is a migrant farmworker or other seasonal farmworker or a dependent of a migrant farmworker or other seasonal farmworker;~~

~~(d) Is a minority person as defined in this chapter; or~~

~~(e) Has financial need as defined in this chapter.~~

~~(2) "Board" means the state board of education and the board of regents of the university of Idaho.~~

~~(3) "Eligible student" means any graduate of an accredited Idaho secondary school who is an at-risk person as defined in this chapter and who declares his intention to matriculate in an eligible postsecondary institution in the state of Idaho during the education year immediately following application for an award under this program.~~

~~(4) "Farmwork" means any agricultural activity, performed for either wages or personal subsistence, on a farm, ranch or similar establishment.~~

~~(5) "Financial need" means the extent of a person's inability to meet the institutionally defined cost of education at an eligible postsecondary institution through~~



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~~parent, family and/or personal resources as determined under rules to be established by the state board of education.~~

~~(6) "Migrant farmworker" means a seasonal farmworker whose employment required travel that precluded the farmworker from returning to his permanent place of residence within the same day.~~

~~(7) "Minority person" means any Idaho resident who is a member of an ethnic group whose members historically have participated in postsecondary education at a rate lower than their occurrence in the population of the United States including, but not limited to, persons of native American, African-American, and Hispanic-American descent.~~

~~(8) "Potential first-generation college student" means a person neither of whose parents received a bachelor's degree.~~

~~(9) "Seasonal farmworker" means a person who, within the past twenty-four (24) months, was employed for at least seventy-five (75) days in farmwork, and whose primary employment was in farmwork on a temporary or seasonal basis (that is, not as a constant year-round activity). All terms not specifically defined in this chapter shall be defined as in [sections 33-4303](#) through [33-4315](#), Idaho Code, governing the state of Idaho scholarship program.~~

~~**33-4605. Eligibility - Maximum amounts - Conditions.** The conditions governing this program and the size of awards shall be the same as those governing the state of Idaho scholarship program except as superseded by provisions of this chapter and as follows:~~

~~(1) Scholarships shall be awarded on the basis of high school records and other criteria to be established by the board. In the case of equally deserving applicants, priority shall be given to the applicant with the greatest financial need.~~

~~(2) The maximum number of scholarships in any given fiscal year shall be the amount of the fiscal year appropriation for this program divided by the amount of the maximum award for this program.~~

~~**33-4606. Duties of board.** The responsibilities of the board for this program shall be the same as for the state of Idaho scholarship program except as superseded by the provisions of this chapter and as follows:~~

~~(1) The board shall allocate funds for this program to participating institutions on the basis of total enrollment of at-risk persons.~~

~~(2) The board shall conduct audits and maintain fiscal controls and fund accounting procedures as may be necessary to assure proper disbursement of funds.~~

~~(3) The board shall promulgate rules and regulations as necessary to implement this program. (4) The total of grant payments to a single recipient may not exceed the grant amount times the following number corresponding to the recipient's class standing as certified by the institution at the time of the initial award: freshman, four (4) years; sophomore, three (3) years; junior, two (2) years; and senior, one (1) year.~~

~~(5) The board each year shall compile a report on award recipients which shall include ethnic origin, sex, grade point average, class standing, and number of college credits completed.~~



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~~(6) The board each year shall compile a report measuring the rates of minority student recruitment and retention at participating institutions.—~~

~~**33-4607. Duties of participating institutions.**— Participating postsecondary institutions shall be responsible for:—~~

~~(1) Selecting recipients of awards.—~~

~~(2) Determining procedures for payment of awards.—~~

~~**33-4608. Relationship of chapter to section 67-5909, Idaho Code.** This act shall not be construed to be in violation of the provisions of [section 67-5909](#), Idaho Code.—~~

SECTION 8. That Chapter 56, Title 33, Idaho code, be and the same is hereby repealed.

~~**33-5601. Short title.** This act shall be known and cited as the "Idaho Opportunity Scholarship Act."—~~

~~**33-5602. Legislative intent.** It is the intent of the legislature to create a scholarship fund to provide financial resources to Idaho students who are economically disadvantaged to close the gap between the estimated cost of attending an eligible Idaho institution of higher education and the expected student and family contribution toward such educational costs, and to encourage the educational development of such students in eligible Idaho postsecondary educational institutions.—~~

~~**33-5603. Purposes.** The purposes of this chapter are to: (1) Increase the opportunity for economically disadvantaged Idaho students to attend postsecondary educational institutions within Idaho;—~~

~~(2) Reduce the financial burden on eligible students and their families who want to attend eligible postsecondary educational institutions within Idaho;—~~

~~(3) Recognize the individual benefit of education to students and provide resources to finance their postsecondary education;—~~

~~(4) Recognize that all Idaho citizens benefit from an educated citizenry, and provide funding to assist with educational costs of participants; and—~~

~~(5) Increase individual economic vitality and improve the overall quality of life for many of Idaho's citizens.—~~

~~**33-5604. Definitions.** As used in this chapter: (1) "Educational costs" means the dollar amount determined annually by the state board of education as necessary for student tuition, fees, room and board, books and such other expenses reasonably related to attendance at an eligible Idaho postsecondary educational institution.—~~

~~(2) "Eligible Idaho postsecondary educational institution" means:—~~

~~(a) A public postsecondary organization governed or supervised by the state board, the board of regents of the university of Idaho, a board of trustees of a community college established pursuant to the provisions of [chapter 21, title 33](#), Idaho Code, or the state board for professional technical education; or—~~

~~(b) Any educational organization located in Idaho which is:—~~



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- ~~(i) Operated privately;—~~
- ~~(ii) Classified as not-for-profit under the Idaho Code;—~~
- ~~(iii) Under the control of an independent board and not directly controlled or administered by a public or political subdivision; and—~~
- ~~(iv) Accredited by an organization recognized by the state board, as provided in [section 33-2402](#), Idaho Code.—~~

~~(3) "Eligible student" means a student who:—~~

- ~~(a) Is an Idaho resident;—~~
- ~~(b) Has or will graduate from an accredited high school or equivalent in Idaho as determined by the state board;—~~
- ~~(c) Has enrolled or applied as a full-time student to an eligible Idaho postsecondary educational institution; and—~~
- ~~(d) Is pursuing an undergraduate degree, certificate or diploma.—~~

~~(4) "Financial eligibility" means the extent of a person's inability to meet the educational costs associated with attending an eligible Idaho postsecondary educational institution through a model of shared responsibility, taking into account the required and expected contributions of such person's parents, family and personal resources.—~~

~~(5) "Opportunity scholarship program" means the scholarship program described in this chapter and in the rules established by the state board.—~~

~~(6) "State board" means the state board of education.—~~

**~~33-5605. Academic and financial eligibility.~~** ~~The state board shall promulgate rules by August 1, 2007, to determine student eligibility, academic and financial eligibility consistent with this section [chapter] for the purpose of awarding the Idaho opportunity scholarship.—~~

**~~33-5606. Application process.~~** ~~(1) The state board shall promulgate rules by August 1, 2007, to establish a process and application form for eligible students to apply for an opportunity scholarship.—~~

~~(2) When applying for an opportunity scholarship an eligible student must:—~~

- ~~(a) Apply or have applied for federal and state student financial assistance available to an eligible student who will attend, or is enrolled in an eligible Idaho postsecondary educational institution;—~~
- ~~(b) Submit to the state board all of the information and documentation required to demonstrate his or her financial eligibility under this chapter, and any other information and documentation the state board may require to determine the applicant's eligibility for an opportunity scholarship under this chapter; and—~~
- ~~(c) Meet any other minimum criteria established by the state board in rule.—~~

**~~33-5607. Selection process – Amount of awards – Conditions.~~** ~~(1) The state board shall promulgate rules by August 1, 2007, consistent with this section, to determine:—~~

- ~~(a) How eligible students will be selected to receive the Idaho opportunity scholarship; and—~~
- ~~(b) When the scholarship award will occur.—~~

~~(2) Funds that are available for the opportunity scholarship program shall be used to provide scholarships based on a sharing of responsibility between the scholarship recipient and his or her family, the federal government and the participating~~



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~~eligible Idaho postsecondary educational institution that the recipient attends for covering the educational costs for attendance.—~~

~~(3) The opportunity scholarship award shall not exceed the actual educational costs at the eligible Idaho postsecondary educational institution that the student attends. The amount of scholarship for attendance on a full-time basis shall not exceed the recognized educational costs, after deducting the following:—~~

~~(a) The assigned student/family responsibility, in an amount to be determined by the state board; and—~~

~~(b) The amount of any other public or private scholarships or grants which the applicant receives.—~~

~~(4) Any scholarship awarded under this chapter shall not exceed the equivalent of eight (8) semesters or the equivalent of four (4) academic years. An eligible Idaho postsecondary educational institution participating in this program shall be required to submit statements of continuing student eligibility to the state board, which shall include verification that the student is still enrolled, attending full time, maintaining satisfactory academic progress and has not exceeded the award eligibility terms.—~~

~~(5) Grant payments shall correspond to academic terms, semesters, quarters or equivalent time periods at an eligible Idaho postsecondary educational institution. In no instance may the entire amount of a grant be paid to or on behalf of such student in advance.—~~

~~(6) If an eligible student, scholarship applicant or scholarship recipient becomes ineligible to participate in the opportunity scholarship program under this chapter or the rules established by the state board, then the eligible student may reapply at any time for further consideration under this chapter.—~~

~~(7) If an eligible student becomes ineligible for a scholarship under this chapter, or if a student discontinues attendance before the end of any semester, quarter, term or equivalent, covered by the grant after receiving payment under this chapter, the eligible Idaho postsecondary educational institution shall remit, up to the amount of any payments made under this grant, any prorated tuition, fees or room and board balances to the state board. The student shall be required to remit, up to the amount of any other reasonable grant balances, such grant balances to the state board. In the event of extreme hardship as determined by the state board, a student may request waiver of remittance.—~~

**33-5608. Opportunity scholarship program account.** ~~(1) There is hereby created an account in the state treasury to be designated the "opportunity scholarship program account."—~~

~~(2) The account shall consist of moneys appropriated to the account by the legislature, moneys contributed to the account from other sources, and the earnings on such moneys. The executive director of the state board may receive on behalf of the state board any moneys or real or personal property donated, bequeathed, devised or conditionally granted to the state board for purposes of providing funding for such account. Moneys received directly or derived from the sale of such property shall be deposited by the state treasurer in the account.—~~

~~(3) Earnings from moneys in the account or specified gifts shall be distributed annually to the state board to implement the opportunity scholarship program as provided for under this chapter.—~~



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~~(4) All moneys placed in the account and earnings thereon are hereby perpetually appropriated to the state board for the purpose described in subsection (3) of this section. All expenditures from the account shall be paid out in warrants drawn by the state controller upon presentation of the proper vouchers. Up to fifty thousand dollars (\$50,000) of the annual earnings distribution to the state board may be used by the state board annually for administrative costs related to the implementation of the provisions of this chapter.~~

~~(5) Allowable administrative costs include, but are not limited to, operating expenses for the implementation and maintenance of a database, operating expenses to administer the program, personnel costs necessary to administer the program and costs related to promoting awareness of the program.~~

~~(6) Pending use, surplus moneys in the account shall be invested by the state treasurer in the same manner as provided under section 67-1210, Idaho Code. Interest earned on the investments shall be returned to the account.~~



SECTION 1. That Section 67-5728, Idaho code, be, and the same is hereby amended to read as follows:

67-5728. PROCURING AND purchasing by state institution of higher education.

~~[Effective until July 1, 2013.]~~ (1) For the purposes of this section, "state institution of higher education" means Lewis-Clark State College, Idaho State University, Boise State University and Eastern Idaho Technical College.

(2) Any state institution of higher education may establish policies and procedures for procuring and purchasing property that shall be substantially consistent with the requirements for procuring and purchasing property as set forth in this chapter and that shall be approved by the state board of education. When the state board of education has approved such policies and procedures for a state institution of higher education, such institution shall not be subject to the provisions of this chapter, except as provided in subsection (3) of this section.

(3) When the state enters into an open contract, no state institution of higher education that has established policies and procedures pursuant to subsection (2) of this section shall fail to utilize such contract without justifiable cause for such action, pursuant to the provisions of subsection (4) of section [67-5726](#), Idaho Code.



SECTION 1. That Section 72-102, Idaho code, be, and the same is hereby amended to read as follows:

72-102. Definitions. Words and terms used in the worker's compensation law, unless the context otherwise requires, are defined in the subsections which follow:

(1) "Alien" means a person who is not a citizen, a national or a resident of the United States or Canada. Any person not a citizen or national of the United States who relinquishes or is about to relinquish his residence in the United States shall be regarded as an alien.

(2) "Balance billing" means charging, billing, or otherwise attempting to collect directly from an injured employee payment for medical services in excess of amounts allowable in compensable claims as provided by rules promulgated by the commission pursuant to section [72-508](#), Idaho Code.

(3) "Beneficiary" means any person who is entitled to income benefits or medical and related benefits under this law.

(4) "Burial expenses" means a sum, not to exceed six thousand dollars (\$6,000) for funeral and burial or cremation, together with the actual expenses of transportation of the employee's body to his place of residence within the United States or Canada.

(5) "Commission" means the industrial commission.

(6) "Community service worker" means:

(a) Any person who has been convicted of a criminal offense, any juvenile who has been found to be within the purview of [chapter 5, title 20](#), Idaho Code, and who has been informally diverted under the provisions of section [20-511](#), Idaho Code, or any person or youth who has been diverted from the criminal or juvenile justice system and who performs a public service for any department, institution, office, college, university, authority, division, board, bureau, commission, council, or other entity of the state, or any city, county, school district, irrigation district or other taxing district authorized to levy a tax or an assessment or any other political subdivision or any private not-for-profit agency which has elected worker's compensation insurance coverage for such person; or

(b) Parolees under department of correction supervision, probationers under court order or department of correction supervision and offender residents of community work centers under the direction or order of the board of correction who are performing public service or community service work for any of the entities specified in paragraph (6)(a) of this section other than the department of correction.

(7) "Compensation" used collectively means any or all of the income benefits and the medical and related benefits and medical services.

(8) "Custom farmer" means a person who contracts to supply operated equipment to a proprietor of a farm for the purpose of performing part or all of the activities related to raising or harvesting agricultural or horticultural commodities.

(9) "Death" means death resulting from an injury or occupational disease.

(10) Dependency limitations.

(a) "Adopted" and "adoption" include cases where persons are treated as adopted as well as those of legal adoption unless legal adoption is specifically provided.



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(b) "Brother" and "sister" include stepbrothers and stepsisters, half brothers and half sisters, and brothers and sisters by adoption.

© "Child" includes adopted children, posthumous children, and acknowledged illegitimate children, but does not include stepchildren unless actually dependent.

(d) "Grandchild" includes children of legally adopted children and children of stepchildren, but does not include stepchildren of children, stepchildren of stepchildren, or stepchildren of adopted children unless actually dependent.

(e) "Parent" includes stepparents and parents by adoption.

(f) "Grandparent" includes parents of parents by adoption, but does not include parents of stepparents, stepparents of parents, or stepparents of stepparents.

(11) "Disability," for purposes of determining total or partial temporary disability income benefits, means a decrease in wage-earning capacity due to injury or occupational disease, as such capacity is affected by the medical factor of physical impairment, and by pertinent nonmedical factors as provided in section [72-430](#), Idaho Code.

(12) "Employee" is synonymous with "workman" and means any person who has entered into the employment of, or who works under contract of service or apprenticeship with, an employer. It does not include any person engaged in any of the excepted employments enumerated in section [72-212](#), Idaho Code, unless an election as provided in section [72-213](#), Idaho Code, has been filed. Any reference to an employee who has been injured shall, where the employee is dead, include a reference to his dependents as herein defined, if the context so requires, or, where the employee is a minor or incompetent, to his committee or guardian or next friend.

(13) (a) "Employer" means any person who has expressly or impliedly hired or contracted the services of another. It includes contractors and subcontractors. It includes the owner or lessee of premises, or other person who is virtually the proprietor or operator of the business there carried on, but who, by reason of there being an independent contractor or for any other reason, is not the direct employer of the workers there employed. If the employer is secured, it means his surety so far as applicable.

(b) "Professional employer" means a professional employer as defined in [chapter 24, title 44](#), Idaho Code.

© "Temporary employer" means the employer of temporary employees as defined in section [44-2403](#)(7), Idaho Code.

(d) "Work site employer" means the client of the temporary or professional employer with whom a worker has been placed.

(14) "Farm labor contractor" means any person or his agent or subcontractor who, for a fee, recruits and employs farm workers and performs any farm labor contracting activity.

(15) "Gender and number." The masculine gender includes the feminine and neuter; "husband" or "wife" includes "spouse"; the singular number includes plural and the plural the singular.

(16) "Income benefits" means payments provided for or made under the provisions of this law to the injured employee disabled by an injury or occupational disease, or his dependents in case of death, excluding medical and related benefits.

(17) "Independent contractor" means any person who renders service for a specified recompense for a specified result, under the right to control or actual control of his principal as to the result of his work only and not as to the means by which such



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result is accomplished. For the purposes of worker's compensation law, a custom farmer is considered to be an independent contractor.

(18) "Injury" and "accident."

(a) "Injury" means a personal injury caused by an accident arising out of and in the course of any employment covered by the worker's compensation law.

(b) "Accident" means an unexpected, undersigned, and unlooked for mishap, or untoward event, connected with the industry in which it occurs, and which can be reasonably located as to time when and place where it occurred, causing an injury.

© "Injury" and "personal injury" shall be construed to include only an injury caused by an accident, which results in violence to the physical structure of the body. The terms shall in no case be construed to include an occupational disease and only such nonoccupational diseases as result directly from an injury.

(19) "Manifestation" means the time when an employee knows that he has an occupational disease, or whenever a qualified physician shall inform the injured worker that he has an occupational disease.

(20) "Medical and related benefits" means payments provided for or made for medical, hospital, burial and other services as provided in this law other than income benefits.

(21) "Medical services" means medical, surgical, dental or other attendance or treatment, nurse and hospital service, medicines, apparatus, appliances, prostheses, and related services, facilities and supplies.

(22) "Occupational diseases."

(a) "Occupational disease" means a disease due to the nature of an employment in which the hazards of such disease actually exist, are characteristic of, and peculiar to the trade, occupation, process, or employment, but shall not include psychological injuries, disorders or conditions unless the conditions set forth in section [72-451](#), Idaho Code, are met.

(b) "Contracted" and "incurred," when referring to an occupational disease, shall be deemed the equivalent of the term "arising out of and in the course of" employment.

© "Disablement," except in the case of silicosis, means the event of an employee's becoming actually and totally incapacitated because of an occupational disease from performing his work in the last occupation in which injuriously exposed to the hazards of such disease, and "disability" means the state of being so incapacitated.

(d) "Disablement," in the case of silicosis, means the event of first becoming actually incapacitated, because of such disease, from performing any work in any remunerative employment; and "disability" means the state of being so incapacitated.

(e) "Silicosis" means the characteristic fibrotic condition of the lungs caused by the inhalation of silicon dioxide (SiO<sub>2</sub>) dust.

(23) "Outworker" means a person to whom articles or materials are furnished to be treated in any way on premises not under the control or management of the person who furnished them.

(24) "Person" means the state or any political subdivision thereof, or any individual, partnership, firm, association, trust, corporation, including the state insurance fund, or any representative thereof.



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(25) "Physician" means medical physicians and surgeons, ophthalmologists, otorhinolaryngologists, dentists, osteopaths, osteopathic physicians and surgeons, optometrists, podiatrists, chiropractic physicians, and members of any other healing profession licensed or authorized by the statutes of this state to practice such profession within the scope of their practice as defined by the statutes of this state and as authorized by their licenses.

(26) "Provider" means any person, firm, corporation, partnership, association, agency, institution, or other legal entity providing any kind of medical services related to the treatment of an injured employee which are compensable under Idaho's worker's compensation law.

(27) "Secretary" means the secretary of the commission.

(28) "Self-insurer" means an employer who has been authorized under the provisions of this law to carry his own liability to his employees covered by this law.

(29) "State" includes any state, district, commonwealth, zone or territory of the United States or any province of Canada.

(30) "Surety" means any insurer authorized to insure or guarantee payment of worker's compensation liability of employers in any state; it also includes the state insurance fund, a self-insurer and an inter-insurance exchange.

(31) "United States," when used in a geographic sense, means the several states, the District of Columbia, the Commonwealth of Puerto Rico, the Canal Zone and the territories of the United States.

(32) "Volunteer emergency responder" means a firefighter or peace officer, or publicly employed certified personnel as that term is defined in section [56-1012](#), Idaho Code, who is a bona fide member of a legally organized law enforcement agency, a legally organized fire department or a licensed emergency medical service provider organization who contributes services.

(33) "Wages" and "wage earning capacity" prior to the injury or disablement from occupational disease mean the employee's money payments for services as calculated under section [72-419](#), Idaho Code, and shall additionally include the reasonable market value of board, rent, housing, lodging, fuel, and other advantages which can be estimated in money which the employee receives from the employer as part of his remuneration, and gratuities received in the course of employment from others than the employer. "Wages" shall not include sums which the employer has paid to the employee to cover any special expenses entailed on him by the nature of his employment.

(34) "Wages" and "wage earning capacity" after the injury or disablement from occupational disease shall be presumed to be the actual earnings after the injury or disablement, which presumption may be overcome by showing that those earnings do not fairly and reasonably represent wage earning capacity; in such a case wage earning capacity shall be determined in the light of all factors and circumstances which may affect the worker's capacity to earn wages.

(35) "Work experience student" means any person enrolled in the public school districts or [public institutions of higher education](#) of this state and who, as part of his instruction, is enrolled in a class or program for academic credit and for which the student is employed by, or works for, a private or governmental entity. The student need not receive wages from the private or governmental entity in order to be classified as a work experience student.



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(36) “Worker’s compensation law” or “workmen’s compensation law” means and includes the worker’s compensation law of this state and any like or similar law of any state, United States, territory, or province of Canada.

SECTION 2. That Section 72-205, Idaho code, be, and the same is hereby amended to read as follows:

72-205. Public employment generally – Coverage. The following shall constitute employees in public employment and their employers subject to the provisions of this law:

(1) Every person in the service of the state or of any political subdivision thereof, under any contract of hire, express or implied, and every official or officer thereof, whether elected or appointed, while performing his official duties, except officials of athletic contests involving secondary schools, as defined by section [33-119](#), Idaho Code.

(2) Every person in the service of a county, city, or any political subdivision thereof, or of any municipal corporation.

(3) Participants in the Idaho youth conservation project under the supervision of the Idaho state forester.

(4) Every person who is a volunteer emergency responder shall be deemed, for the purposes of this law, to be in the employment of the political subdivision or municipality where the department, agency or organization is organized.

(5) Every person who is a regularly enrolled volunteer member or trainee of the department of disaster and civil defense, or of a civil defense corps, shall be deemed, for the purposes of this law, to be in the employment of the state.

(6) Members of the Idaho national guard while on duty and employees of or persons providing voluntary service to an approved Idaho national guard morale, welfare, and recreational activity. No Idaho compensation benefits shall inure to any such member, employee or volunteer or their beneficiaries for any injury or death compensable under federal law.

(7) A community service worker, as that term is defined in section [72-102](#), Idaho Code, is considered to be an employee in public employment for purposes of receiving worker’s compensation benefits, which shall be the community service worker’s exclusive remedy for all injuries and occupational diseases as provided under chapters 1 through 8, [title 72](#), Idaho Code.

(8) Every person who participates in a youth employment program funded in whole or in part by state or federal money and administered by a state or federal agency or a nonprofit corporation or entity.

(9) A work experience student, as that term is defined in section [72-102](#), Idaho Code, who does not receive wages while participating in the school’s work experience program shall be covered by the school district’s policy [or Idaho Higher Education policy](#).



33-2406. SURETY BOND. As a condition of registration, a proprietary school shall obtain a surety bond, or other financial instrument in a format approved by the director, issued by an insurer duly authorized to do business in this state in favor of the state of Idaho for the indemnification of any student for any loss suffered as a result of a failure by such proprietary school to satisfy its obligations pursuant to the terms and conditions of any contract for tuition or other instructional fees entered into between the proprietary school and a student, or as a result of any violation of this chapter or the rules promulgated pursuant to this chapter. The term of the bond shall extend over the period of registration, and shall be in such amount as is established in rule by the board. ~~The board may permit the director to accept from a newly registered proprietary school, for a period not to exceed five (5) years, a bond in a lesser amount that is supplemented by other financial instruments deemed acceptable by the director.~~

The director may submit a demand upon the surety on the bond on behalf of a student or students when it is reasonably believed that a loss has occurred due to a failure by such proprietary school to satisfy its obligations pursuant to the terms and conditions of any contract for tuition or other instructional fees entered into between the proprietary school and a student, or as a result of any violation of the provisions of this chapter or the rules promulgated pursuant to this chapter.

Neither the principal nor surety on the bond or other financial instrument may terminate the coverage of the bond, except upon giving one hundred twenty (120) days' prior written notice to the director.



**TITLE 33. EDUCATION  
CHAPTER 9. SCHOOL FUNDS**

**§ 33-909. Public school facilities cooperative funding program – Fund created**

(1) In fulfillment of the constitutional requirement to provide a general, uniform and thorough system of public, free common schools, it is the intent of the state of Idaho to advance its responsibility for providing a safe environment conducive to learning by providing a public school facilities funding program to enable qualifying school districts to address unsafe facilities identified as unsafe under the standards of the Idaho uniform school building safety act.

(2) Participation in the program, for the purpose of obtaining state financial support to abate identified school building safety hazards, requires submission of an application to the public school facilities cooperative funding program panel. Application can be made by:

(a) Any school district that has failed to approve at least one (1) or more bond levies for the repair, renovation or replacement of existing unsafe facilities, within the two (2) year period immediately preceding submission of the application; or

(b) The administrator of the division of building safety, for a school district that has failed to address identified unsafe facilities as provided in chapter 80, title 39, Idaho Code.

(3) There is hereby created within the office of the state board of education the Idaho public school facilities cooperative funding program panel, hereafter referred to as the panel. The panel shall consist of the administrator of the division of building safety, the administrator of the division of public works and the executive director of the state board of education, or a designee appointed by a panel member. It shall be the duty of the panel to consider all applications made to it, and to either approve, modify or reject an application based on the most economical solution to the problem, as analyzed within a projected twenty (20) year time frame.

(4) The application shall contain the following information:

(a) The identified school building safety hazards and such other information necessary to document the deficiencies;

(b) The school district's plan for abating the defects, including costs and sources and amounts of revenue available to the school district;

(c) The market value for assessment purposes of the school district; and



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(d) A detailed accounting of all bond and plant facility levies of the school district and the revenues raised by such levies.

For applications initiated by the administrator of the division of building safety pursuant to subsection (2)(b) of this section, the school district shall provide the information required in this subsection (4) if such information is not available to the administrator.

(5) In considering an application, the panel shall determine whether the plan as proposed is acceptable, or is acceptable with modifications as determined by the panel, or should be rejected. The panel shall notify the applicant of its decision, in writing, within sixty (60) days of receiving the application. At the same time the panel notifies the applicant, the panel shall send notification of an approved application or a modified application to the state board of education, along with the panel's specifications for the project and its costs.

(6) If an application received from a school district is accepted or modified by the panel, the local board of trustees of that school district, at the next election held pursuant to *section 34-106, Idaho Code*, shall submit the question to the qualified electors of the school district of whether to approve a bond in the amount of the cost of the project as approved by the panel.

(7) Within thirty-five (35) calendar days of receiving notification from the panel that an application submitted by the administrator of the division of building safety pursuant to subsection (2)(b) of this section has been approved or modified by the panel, or within thirty-five (35) calendar days of receiving certification from the panel that the question submitted to the electorate pursuant to subsection (6) of this section was not approved in the election, the state board of education shall appoint a district supervisor for interim state supervision of the local school district. The district supervisor shall be responsible for ensuring that the project, as approved by the panel, is completed and shall regularly report to the panel in a manner as determined by the panel upon approval of the project. The district supervisor shall also have the authority granted to said position by the provisions of *section 6-2212, Idaho Code*. A district supervisor's term of service shall continue for the duration of the project, and such person appointed as a district supervisor shall serve at the pleasure of the state board of education.

(8) The abatement of unsafe public school facilities through the public school facilities cooperative funding program shall be performed in accordance with the regular permitting, plan review, and inspection requirements of the division of building safety. The Idaho building code board shall function as a board of appeals for the division of building safety for such construction in accordance with section 39-4107, Idaho Code. Upon successful completion of the construction in accordance with applicable building codes, a certificate of occupancy shall be issued by the administrator of the division of building safety. Upon issuance of a certificate of occupancy, responsibility for ensuring the safety of the facility, or portion thereof so constructed will then be returned to the school district, and responsibility for ensuring subsequent compliance with building codes returned to the authority having jurisdiction.



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(9) Upon approval of an application or a modified application submitted by the administrator of the division of building safety pursuant to subsection (2)(b) of this section, or upon receipt of certification from the county that the question submitted to the electorate pursuant to subsection (6) of this section was not approved in the election, the panel shall certify the cost of the project, as approved by the panel, to the state department of education.

(a) The total cost of the project shall initially be paid by the state from the public school facilities cooperative fund.

(b) The district's share of costs that may be repaid through the levy provisions of this section shall not exceed the district's share of bond payment costs as calculated for the bond levy equalization support program in the fiscal year in which the application is made. Interest shall be charged on the unpaid balance of the district's share of costs, as such balance exists at the end of each fiscal year, at the rate of interest earned by the state treasurer on the investment of the idle funds in that fiscal year.

(c) It shall be the responsibility of the state department of education to calculate a state-authorized plant facilities levy rate in accordance with the provisions of subsection (9) of this section, which, when imposed over a maximum period not to exceed twenty (20) years, may yield the revenues needed to repay the school district's share of the cost of the project.

(d) The levy rate calculated by the state department of education shall be certified by the department to the county or counties wherein the boundaries of the school district are contained, for assessment of the levy and collection of the revenues by such county or counties in the manner provided by law. The revenues collected by imposition of the state-authorized plant facilities levy shall be remitted to the state treasurer for deposit to the public school facilities cooperative fund.

(10) The annual state-authorized plant facilities levy rate shall be limited to the greater of:

(a) The difference between the school district's combined bond and plant facilities levy rates, and the statewide average bond and plant facility levy rates; or

(b) The statewide average plant facility levy rate.

The initial levy rate so calculated shall be established as the minimum levy rate that shall be imposed for the amount of time required to reimburse the state for the school district's share of the project cost, but not to exceed twenty (20) years, even if this period would not provide reimbursement of the entire amount of the school district's share of the cost of the project. The state department of education is authorized and directed to recalculate the levy rate on an annual basis, and is authorized to increase or decrease the levy rate according to the scheduled payback, but the levy rate shall not be less than the levy rate initially imposed. Provided however, if the levy rate calculated is estimated to raise more money than would be necessary to repay the district's share of costs, then the state department of education shall certify to the county or counties



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wherein the boundaries of the school district are contained, the moneys necessary to repay the district's share of costs.

(~~40~~11) There is hereby created in the state treasury a public school facilities cooperative fund. The fund shall contain such moneys as may be directed pursuant to appropriation. Moneys in the fund shall be used exclusively to finance the public school facilities cooperative funding program, and are hereby continuously appropriated for such purposes as authorized by this section. Moneys in the fund shall be invested by the state treasurer in the same manner as provided under *section 67-1210, Idaho Code*, with respect to other idle moneys necessary to repay the district's share of costs.



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**SUBJECT**

Distinguished Schools and Additional Yearly Growth Awards for 2012.

**REFERENCE**

October 2011	Board presented with Distinguished Schools and Additional Yearly Growth Awards for 2011
October 2010	Board presented with Distinguished Schools and Additional Yearly Growth Awards for 2010

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho Administrative Rule, IDAPA 08.02.03, Section 113 – Accountability Awards

**BACKGROUND/DISCUSSION**

Since 2007, the Board has recognized Idaho K-12 schools who meet very rigorous requirements as part of their performance on the Idaho Standards Achievement Test (ISAT). IDAPA 08.02.03, subsection 113 outlines the requirements for the Distinguished Schools and the Additional Yearly Growth awards. The Distinguished Schools Award is given to schools who meet the following criteria:

- Must make AYP two consecutive years
- Based on grade level test
  - Reduce gap between group or subgroups
  - Subgroups must have at least 34 or greater student populations
- Top 5% of this group of schools that have reduced the gap(s) in their school

Nine (9) schools will receive the Distinguished Schools Award this year.

The Additional Yearly Growth Award is given to schools who meet the following criteria:

- Must make AYP two consecutive years
- Based on grade level test:
  - Show an increase in at least one group or subgroup- Ethnicity or Special Programs (Special Ed, LEP, Free or Reduced Lunch)
  - Groups/Subgroups must have at least 34 or greater student populations.
  -

Six (6) schools will receive Additional Yearly Growth Awards this year.

**IMPACT**

Once presented to the Board, Board staff will arrange visits to the recipient schools to present the awards.

**ATTACHMENTS**

Attachment 1 – List of Awards for 2012

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**BOARD ACTION**

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



**Distinguished Schools Award 2012**

Carey Public School, Blaine County District  
Central Elementary, Nampa School District  
Challis Elementary School, Challis Joint District  
Filer Elementary School, Filer District  
Garfield Elementary School, Boise Independent District  
Grace Junior/Senior High School, Grace Joint District  
Idaho Arts Charter School, Nampa  
Lowell Elementary School, Boise Independent District  
Rocky Mountain High School, Joint District No. 2 (Meridian)

**Additional Yearly Growth Award 2012**

Capital Senior High School, Boise Independent District  
Hamer Elementary School, West Jefferson District  
Wilder Elementary School, Wilder District  
Rocky Mountain High School, Joint District No. 2 (Meridian)  
Salmon River Junior/Senior High School, Salmon River Joint School District  
Victor Elementary School, Teton County District



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**SUBJECT**

Alcohol Permits - Issued by University Presidents

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies and Procedures, I.J.2.b.

**BACKGROUND/DISCUSSION**

The chief executive officer of each institution may waive the prohibition against possession or consumption of alcoholic beverages only as permitted by and in compliance with Board policy. Immediately upon issuance of an Alcohol Beverage Permit, a complete copy of the application and the permit shall be delivered to the Office of the State Board of Education, and Board staff shall disclose the issuance of the permit to the Board no later than the next Board meeting.

The last update presented to the Board was at the August 2012 Board meeting. Since that meeting, Board staff has received ten (10) permits from Boise State University, thirteen (13) permits from Idaho State University, and sixteen (16) permits from the University of Idaho.

Board staff has prepared a brief listing of the permits issued for use. The list is attached for the Board's review.

**ATTACHMENTS**

Attachment 1 - List of Approved Permits by Institution

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**BOARD ACTION**

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



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<b>APPROVED ALCOHOL SERVICE AT BOISE STATE UNIVERSITY August 2012 – October 2012</b>				
<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
Surprise Birthday Party	Stueckle Sky Center (SSC)		X	8/25/12
Coaches Radio Show	SSC	X		8/27/12, 9/26/12, 10/3/12, 10/10/12, 10/17/12
Cecil D. Andrus Award for Political Leadership	SUB – Jordan Ballroom	X		9/28/12
Ronald McDonald House Dinner/Auction	SSC		X	9/18/12
National Association of Regional Councils / Compass Reception	SSC		X	9/24/12
Planned Parenthood Annual Check-Up Fundraiser	SSC		X	10/2/12
Stick Your Neck Out for Idaho's Children Event	SUB – Simplot Ballroom		X	10/4/12
Brantley Gilbert: Hell on Wheels Tour	Taco Bell Arena		X	10/6/12
Heather Williams Wedding	SSC		X	10/6/12
All Steinway Donor Celebration	Founder's Room		X	10/9/12



**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS  
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<b>APPROVED ALCOHOL SERVICE AT IDAHO STATE UNIVERSITY August 2012 – April 2013</b>				
<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
"Idaho Heroes" Honoring the Rahims	PAC – Rotunda		X	8/24/12
Faculty/Staff Welcoming Assembly	SUB – Salmon River		X	8/30/12
Week of Welcome Musical Closing Night Reception	Stephens Performing Arts Center (SPAC)		X	9/1/12
IANs/IEEE Dinner Meeting	CAES		X	9/11/12
Tour de Vins Wine Tasting & Auction	SUB – ISU Ballroom		X	9/15/12
Reception for Meridian VIP's	Meridian Health Sciences Center		X	9/18/12
Idaho National Lab Fertel & Pardee Visit	CAES		X	9/20/12
Civic Symphony Concert	SPAC – Rotunda		X	9/28/12, 11/9/12, 12/7/12, 12/8/12, 2/15/13, 3/9/13, 4/26/13, 4/27/13
Robinson / Phillips Wedding & Reception	SPAC		X	10/6/12
Festival of Trees: Opening Gala	SPAC		X	11/27/12
Festival of Trees: Employee Appreciation Reception	SPAC		X	11/28/12
Festival of Trees: Ladies Holiday Tea	SPAC		X	12/1/12
Festival of Trees: Employee Party	SPAC		X	12/1/12



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<b>APPROVED ALCOHOL SERVICE AT UNIVERSITY OF IDAHO August 2012 – December 2012</b>				
<b>EVENT</b>	<b>LOCATION</b>	<b>Institution Sponsor</b>	<b>Outside Sponsor</b>	<b>DATE (S)</b>
U of I Donors / Prospects Reception	Sun Valley Resort	X		8/5/12
New Department Chairs Meeting with U of I Leadership	1795 Amy Court, Moscow, ID	X		8/8/12
New U of I Faculty Orientation Dinner	President's Residence	X		8/12/12
Convocation Speaker Dinner: George P. Bush	President's Residence	X		8/16/12
Engineering Reception before the North Idaho Celebration	CDA Resort – Floating Green Restaurant	X		8/23/12
Graduate Student Leadership Reception	President's Residence	X		8/27/12
College of Engineering Alumni Dinner	McMenamins Grand Lodge, OR	X		9/6/12
UI Prichard Art Gallery Friends Annual Meeting	UI Prichard Art Gallery	X		9/20/12
Golden I Reunion Celebration Dinner	SUB – Ballroom	X		9/21/12
Faculty Club – Faculty Networking	Commons – Clearwater/Whitewater Rooms	X		9/28/12
Women's Leadership Conference	SUB – Ballroom	X		10/4/12
Faculty Gathering / Interdisciplinary Reception	Commons – Clearwater/Whitewater Rooms	X		10/12/12
Mark Twain Donor Reception	Legacy Point, UI Boise	X		10/16/12
Alcohol Awareness Education with Moscow Police Department	SUB – Ballroom	X		10/17/12
Alumni Awards for Excellence	SUB – Ballroom	X		12/7/12
Palouse Holiday Gingerbread Dinner	SUB – Ballroom	X		12/11/12



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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
<b>1</b>	<b>AMENDMENT to OPTIONAL RETIREMENT PLAN</b>	Motion to approve
<b>2</b>	<b>AMENDMENT TO BOARD POLICY</b> Section II.H. – Coaching Personnel – 1 <sup>st</sup> Reading	Motion to approve
<b>3</b>	<b>COMPENSATION ADJUSTMENTS FOR AGENCY HEADS</b>	Motion to approve
<b>4</b>	<b>BOISE STATE UNIVERSITY</b> Multi-Year Employment Agreement – Vice President of University Advancement	Motion to approve
<b>5</b>	<b>UNIVERSITY of IDAHO</b> Multi-Year Employment Agreement – Track & Field and Cross-Country Coach	Motion to approve
<b>6</b>	<b>UNIVERSITY of IDAHO</b> Multi-Year Employment Agreement – Women’s Soccer Coach	Motion to approve
<b>7</b>	<b>AMENDMENT TO BOARD POLICY</b> Section II.G. – Policies Regarding Faculty – 1 <sup>st</sup> Reading	Motion to approve



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**SUBJECT**

Optional Retirement Plan (ORP)

**REFERENCE**

December 2011                      Amendments to bring the Plan into compliance with federal tax law

**APPLICABLE STATUTES, RULE OR POLICY**

Idaho Code 33-107A, 107B

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

**BACKGROUND / DISCUSSION**

Over the years the ORP vendors and the institutions have frequently requested clarification and guidance with regard to the plan document's cash withdrawal provisions.

Section 7.2 of the ORP plan document provides as follows:

Cash Withdrawals. A Participant who has terminated employment may withdraw Participant Plan Contributions or receive benefits in any form the relevant Funding Vehicle permits, including a cash withdrawal.

Except, following retirement or termination of employment prior to age 55, if total accumulation is less than or equal to \$15,000, both Participant and Institution Plan Contributions are available in a cash withdrawal subject to any restrictions of the Funding Vehicles of the Fund Sponsor.

Section 7.8 provides:

Direct Rollovers. This section applies to distributions made on or after January 1, 1993. Notwithstanding any provision of the Plan to the contrary that would otherwise limit a distributee's election under this section, a distributee may elect, at the time and in the manner prescribed by the plan administrator, to have any portion of an eligible rollover distribution paid directly to an eligible retirement plan specified by the distributee in a direct rollover.

In 2010, the Board's deputy attorney general and staff reviewed the Board's ORP document with regard to the permissibility of direct rollovers vis-à-vis the limitations on cash withdrawal set forth in Section 7.2 of the Plan document. Based on a plain reading of Section 7.8 it was concluded that a distributee may request a rollover distribution to an IRA, the limitations of Section 7.2 notwithstanding.

Nevertheless, the withdrawal rules still cause some confusion with vendors and participants. A survey of the human resources and benefits directors at the



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institutions showed unanimous support for allowing former employees to completely withdraw the employee and employer accumulation regardless of amount or age. Board tax counsel has opined that the plan's current restrictions on withdrawals are not common.

The proposed revisions are as follows:

1. Amend Section 7.1 by replacing the words: "Cash withdrawals (to the extent the Funding Vehicle permits and subject to the limitations in the "cash withdrawals" section of this Article)" with the following: "Cash withdrawals to the extent the Funding Vehicle permits."
2. Delete Section 7.2 "Cash Withdrawals."
3. Delete Section 7.7 "Small Lump Sum Payments."
4. Amend Section 7.6 to read as follows:  
Minimum Distribution Requirements. No payment option may be selected by the Participant (or a Beneficiary) unless it satisfies the requirements of Internal Revenue Service Code section 401(a)(9) (including the incidental death benefit requirements of Code section 401(a)(9)(G). and Treasury Regulations 1.409(a)-1 through 1.401(a)(9)-8), all as applicable to governmental plans. The requirements of this section shall take precedence over any inconsistent provisions of the Plan. All distributions shall begin not later than the April 1 immediately following the calendar year in which the Participant reaches age 70 ½ or in which the Participant subsequently retires from employment with the Institution.
5. Add Section 7.8 to require a mandatory distribution of a Participant's Account which is valued at \$1,000 or less at the time of distribution.
6. Revise and clarify the definition of the term "Compensation" (see Section 1.6). While this definition differs from how the term is defined in the 403(b) and 457(b) plans, the definition of compensation will generally affect only the amount of ORP employee and employer contributions, not the amount of 403(b) or 457(b) plan contributions because the ORP contributions are based on a percentage of compensation. In contrast, an employee whose regular pay exceeds \$16,500 (plus a bit more for those making catch-up contributions) should be able to make the maximum 403(b) and 457(b) contributions regardless of the details of what the definition of compensation includes or excludes.

Finally, the provisions of Amendment 1 to the Plan have been incorporated into the Plan document itself so it is no longer necessary to read both the plan document and the amendment together to determine allowance and requirements.

**IMPACT**

This amendment will simplify ORP distribution rules to: (1) allow terminated employees to elect to take distribution of their ORP accounts without regard to their age, the size of the account or whether the distribution is rolled over to an IRA; and (2) incorporate by reference the minimum distribution rules of the



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Internal Revenue Code. The amendment will also make the document more user friendly.

**ATTACHMENTS**

Attachment 1 – Plan Document - Clean

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Attachment 2 – Plan Document - Redline

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**STAFF COMMENTS AND RECOMMENDATIONS**

Staff has worked with the Board's tax counsel and deputy attorney general in drafting this amendment. Institution human resources and benefits directors, along with ORP vendor representatives, have all had opportunity for prior review and comment of the amendment. Staff recommends approval.

**BOARD ACTION**

I move to approve the amendments to the Optional Retirement Plan document as presented in Attachment 1.

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



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**Idaho State Board of Education  
Optional Retirement Plan**

**A Defined Contribution Retirement Plan**

**Restated November 2001**

**Amendment 1, effective the first day of the first plan year beginning after December 31, 2001**

**Restated December 2003**

**Restated to include amendments through 2008**

**Restated December 2011**

**Restated effective January 2013**



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ARTICLE X	Miscellaneous



**Article I: Definitions**

- 1.1 **Accumulation Account** means the separate account(s) established for each Participant. The current value of a Participant's Accumulation Account includes all Plan Contributions, less expense charges, and reflects credited investment experience.
- 1.2 **Annual Additions** means the sum of the following amounts credited to a Participant's Accumulation Account during the Limitation Year: (a) Plan Contributions; (b) forfeitures, if any; and (c) individual medical account amounts described in section 415(l)(2) and 419A(d)(2) of the Code, if any.
- 1.3 **Beneficiary (ies)** means the individual, institution, trustee, or estate designated by the Participant to receive the Participant's benefits at his or her death.
- 1.4 **Board** means the Idaho State Board of Education and Board of Regents of the University of Idaho as defined in Idaho Code §33-101.
- 1.5 **Code** means the Internal Revenue Code of 1986, as amended.
- 1.6 **Compensation** means an employee's total annual salary (inclusive of bonuses, overtime pay and overload pay, as applicable) paid in the Plan Year not reduced by a compensation election deduction because of the application of Code Sections 125 , 403(b) or 457(b). Compensation does not include the following items (even if includible in gross income):
- (a) Contributions by employers to employee held medical savings accounts, as those accounts are defined in section 63-3022K, Idaho Code.
  - (b) Lump sum payments inconsistent with usual compensation patterns made by the employer to the employee only upon termination from service including, but not limited to, vacation payoffs and bonuses.
  - (c) Employer payments to employees for or related to travel, mileage, meals, lodging or subsistence expenses, without regard to the taxability of such payments for federal income tax purposes and without regard to the form of payment, including payment made as reimbursement of an itemized expense voucher and payment made of an unvouchered expense allowance.
  - (d) The value of a reduction in tuition provided by an educational institution to an employee which does not qualify for exclusion from the employee's wages because of the application of Code Section 117.
  - (e) Fringe benefits (cash and noncash).
  - (f) Moving expense reimbursements as defined in section 67-5337, Idaho Code.

**Annual Compensation Limit.** The annual compensation of each Participant taken into account in determining allocations for any plan year beginning after December 31, 2001, shall not exceed \$200,000, as adjusted for cost-of-living increases in accordance with section 401(a)(17)(B) of the Code. Annual compensation means compensation during the plan year or such other consecutive 12 month period over which compensation is otherwise determined under the plan (the determination period). The cost-of-living adjustment in effect for a calendar year applies to annual compensation for



the determination period that begins with or within such calendar year. If a determination period consists of fewer than 12 months, the annual compensation limit will be multiplied by a fraction, the numerator of which is the number of months in the determination period, and the denominator of which is 12.

If compensation for any prior determination period is taken into account in determining an employee's benefits accruing in the current Plan Year, the compensation for that prior determination period is subject to the OBRA '93 annual compensation limit in effect for that prior determination period. For this purpose, for determination periods beginning before the first day of the first Plan Year beginning on or after January 1, 1996 through December 31, 2001, the OBRA '93 annual compensation limit is \$150,000.

Notwithstanding the above, employees who became Participants in the Plan before the first day of the Plan Year beginning on or after January 1, 1996, will be subject to the annual compensation limit in effect under the Plan before that date, as determined by IRS regulations.

- 1.7 ***Date of Employment or Reemployment*** means the effective date of the appointment for a faculty member or professional staff. For all other employees, the Date of Employment or Reemployment is the first day upon which an employee completes an Hour of Service for performance of duties during the employee's most recent period of service with the Institution.
- 1.8 ***Eligible Employee*** means faculty or nonclassified staff of the Office of the Idaho State Board of Education, Boise State University, Idaho State University, University of Idaho, or Lewis-Clark State College initially appointed or hired between July 1, 1990 and June 30, 1993 who work on a .50 full-time equivalency basis or more and similar employees hired before July 1, 1990 who elected to participate in the Plan during the 90 day period from July 1, 1990 to September 28, 1990; and teaching staff and officers of the Office of the Idaho State Board of Education, Boise State University, Idaho State University, University of Idaho, or Lewis-Clark State College initially appointed or hired on or after July 1, 1993 who work on a .50 full-time equivalency basis or more; and teaching staff and officers of the College of Southern Idaho, North Idaho College, College of Western Idaho, or Eastern Idaho Technical College initially appointed or hired on or after July 1, 1997 who work on a .50 full-time equivalency basis or more and similar employees hired before July 1, 1997 who elected to participate in the Plan during the 150 day period from July 1, 1997 to November 28, 1997. However, "Eligible Employee" shall exclude:
  - (a) an Employee whose employment is expected to be less than five (5) months; and
  - (b) an Employee whose employment is incidental to his or her status as a student at the Institution; and
  - (c) an Employee who is vested in the Public Employee Retirement System of Idaho (PERSI) and who makes a one time irrevocable election to remain a member of that retirement system within 60 days of the date of initial hire or appointment.

The term Eligible Employee shall not include any leased employee deemed to be an employee of the Institution as provided in Code Section 414(n).



If an individual is classified as an independent contractor during any period of providing services to the Institution, such individual will be deemed to be in an ineligible class of employees for purposes of the Plan during such period, even if the individual is determined to be a common law employee during such period pursuant to a government audit or litigation. Notwithstanding the above, if the failure to cover such reclassified individual would prevent the Plan from satisfying the minimum coverage requirement under Code Section 410(b) for a Plan year, the minimum number of such individuals necessary for the plan to fulfill such minimum coverage requirements will be included as eligible employees for the plan year, with preference given to those reclassified individuals with the smallest amount of compensation.

No individual who is deemed to be an independent contractor, as determined by the Plan Administrator in its sole discretion, or individual performing services for the Employer pursuant to an agreement that provides that such individual shall not be eligible to participate in the retirement or other benefit plans of the Employer, shall be an Eligible Employee for purposes of this plan.

- 1.9 ***Fund Sponsor*** means an insurance, variable annuity or Investment Company that provides Funding Vehicles available to Participants under this Plan.
- 1.10 ***Funding Vehicles*** means the annuity contracts or custodial accounts that satisfy the requirements of Code Section 401(f) issued for funding accrued benefits under this Plan and specifically approved by the Institution for use under this Plan.
- 1.11 ***Hours of Service means:***
- (a) Each hour for which an employee is paid, or entitled to payment, for the performance of duties for the Institution.
  - (b) Each hour for which an employee is paid, or entitled to payment, on account of a period of time during which no duties are performed (regardless of whether employment has terminated) due to vacation, holiday, illness, incapacity (including disability), layoff, jury duty, military duty, leave of absence, or maternity or paternity leave (whether paid or unpaid). However, any period for which a payment is made or due under a plan maintained solely for the purpose of complying with Workers' Compensation or unemployment compensation or disability insurance laws, or solely to reimburse the employee for medical or medically-related expenses is excluded. An employee is directly or indirectly paid, or entitled to payment by the Institution regardless of whether payment is made by or due from the Institution directly or made indirectly through a trust fund, insurer or other entity to which the Institution contributes or pays premium. No more than 501 Hours of Service will be credited under this paragraph. Hours of Service under this paragraph will be calculated and credited pursuant to Section 2530.200b-2 of the Department of Labor Regulations, incorporated herein by reference.



- (c) Each hour for which back pay, irrespective of mitigation of damages, is either awarded or agreed to by the Institution, without duplication of hours provided above, and subject to the 501-hour restriction for periods described in (b) above.

Hours of Service will be credited for employment with other members of an affiliated service group (under Code Section 414(m)), a controlled group of corporations (under Code Section 414(b)), or a group of trades or businesses under common control (under Code Section 414(c)) of which the Institution is a member, and any other entity required to be aggregated with the employer pursuant to Code Section 414(o) and the regulations thereunder. Hours of Service also will be credited for any person considered an employee for this Plan under Code Sections 414(n) or 414(o) and the regulations thereunder.

Hours of Service will be determined on the basis of actual hours that an employee is paid or entitled to payment.

- 1.12 ***Institution*** means the Board and employment units under its jurisdiction, namely:  
 The Office of the Idaho State Board of Education  
 Boise State University  
 Idaho State University  
 University of Idaho  
 Lewis-Clark State College  
 Eastern Idaho Technical College  
 College of Southern Idaho  
 North Idaho College  
 College of Western Idaho
- 1.13 ***Institution Plan Contributions*** means contributions made by the Institution under this Plan.
- 1.14 ***Limitation Year*** means a calendar year.
- 1.15 ***Normal Retirement Age*** means age 65.
- 1.16 ***Participant*** means any Eligible Employee of the Institution participating in this Plan.
- 1.17 ***Participant Plan Contributions*** means contributions made by a Participant under this Plan. Participant Plan Contributions are designated as being picked-up by the Institution in lieu of contributions by the Participant, in accordance with Code Section 414(h)(2). The pick-up amounts cannot be received directly by the Participant and are required to be made.
- 1.18 ***Plan*** means the Idaho State Board of Education Optional Retirement Plan as set forth in this document, and pursuant to Idaho Code §33-107A and 33-107B.
- 1.19 ***Plan Contributions*** means the combination of Participant Plan Contributions and Institution Plan Contributions.



- 1.20 **Plan Entry Date** means the later of the Effective Date of the Plan or the Eligible Employee's Date of Employment or Reemployment.
- 1.21 **Plan Year** means January 1 through December 31.
- 1.22 **Year of Service** means a 12-month period (computation period) during which the Eligible Employee completes 1,000 or more Hours of Service.

**Article II: Establishment of Plan**

- 2.1 **Establishment of Plan.** The Idaho State Legislature authorized the Board to establish the Plan as of July 1, 1990.

This Plan document sets forth the provisions of this Code Section 401(a) Plan. The Plan was restated as of November 1, 2001. Plan Contributions are invested, at the direction of each Participant, in one or more of the Funding Vehicles available to Participants under the Plan. Plan Contributions shall be held for the exclusive benefit of Participants. Participant Plan Contributions are designated as being picked-up by the Institution in lieu of contributions by the Participant, in accordance with Code Section 414(h)(2).

It is intended that this Plan will not be subject to the requirements of ERISA under Department of Labor Regulation Section 2510.3-2(f).



**Article III: Eligibility for Participation**

- 3.1 **Eligibility.** An Eligible Employee must, as a condition of employment, begin participation in this Plan on the Plan Entry Date following employment at the Institution.
- 3.2 **Notification.** The Institution will notify an Eligible Employee when he or she has completed the requirements necessary to become a Participant. An Eligible Employee who complies with the requirements and becomes a Participant is entitled to the benefits and is bound by all the terms, provisions, and conditions of this Plan, including any amendments that, from time to time, may be adopted, and including the terms, provisions and conditions of any Funding Vehicle(s) to which Plan Contributions for the Participant have been applied.
- 3.3 **Enrollment in Plan.** To participate in this Plan, an Eligible Employee must complete the necessary enrollment form(s) and return them to the Institution. An employee who has been notified that he or she is eligible to participate but who fails to return the enrollment forms will be deemed to have waived all of his or her rights under the Plan except the right to enroll at a future date.
- 3.4 **Reemployment.** A former employee who is reemployed by the Institution will be eligible to participate upon meeting the requirements stated in the "Eligibility" section of Article III. A former employee who satisfied these requirements before termination of employment will be eligible to begin participation immediately after reemployment provided the former employee is an Eligible Employee.
- 3.5 **Termination of Participation.** A Participant will continue to be eligible for the Plan until one of the following conditions occur:
- he or she ceases to be an Eligible Employee;
  - the Plan is terminated.



## Article IV: Plan Contributions

- 4.1 **Plan Contributions.** Plan Contributions will be made for Eligible Employees who have satisfied the requirements of Article III as follows:

Each Institution shall contribute the percentage indicated below of the Compensation of that Institution's Participants, reduced by the amount necessary, if any, to provide contributions to a total disability program, but in no event less than five percent (5%) of each Participant's Compensation:

NIC, CSI, CWI and EITC: an amount equal to the Public Employee Retirement System of Idaho (PERSI) contributions rates;

UI, BSU, ISU, LCSC and the Office of the State Board of Education: nine and thirty-five one hundredths percent (9.35%); and

Each Participant shall contribute an amount equal to six and ninety-seven hundredths percent (6.97%) of his or her Compensation.

Plan Contribution rates are defined in Idaho Code §33-107A and §33-107B and are subject to change as those sections are amended.

Plan Contributions are considered to be credited to Participants no later than the last day of the Plan Year for which the Plan Contributions are made.

- 4.2 **When Contributions Are Made.** Plan Contributions will begin when the Institution has determined that the Participant has met or will meet the requirements of Article III. Any part of a year's Plan Contributions not contributed before this determination will be included in contributions made for that year after the determination. Plan Contributions will be forwarded to the Fund Sponsor(s) in accordance with the procedures established by the Institution. Institution Plan Contributions will be forwarded to the Fund Sponsor(s) at least annually. Participant Plan Contributions will be forwarded by the Institution to the Fund Sponsor(s) as soon as it is administratively feasible for the Institution to segregate contributions, but in any event, within the time required by law.
- 4.3 **Allocation of Contributions.** A Participant may allocate Plan Contributions to the Funding Vehicle(s) in any whole-number percentages that equal 100 percent. A Participant may change his or her allocation of future contributions to the Funding Vehicle(s) according to the administrative procedures of the Fund Sponsor(s). A Participant may direct contributions to only one Fund Sponsor at any given time. However, a Participant may change Fund Sponsors once per calendar year by completing the appropriate forms provided by the Institution.
- 4.4 **Leave of Absence.** During a paid leave of absence, Plan Contributions will continue to be made for a Participant on the basis of Compensation then being paid by the Institution. No Plan Contributions will be made during an unpaid leave of absence.
- 4.5 **Transfer of Funds from Another Plan.** The Fund Sponsor shall accept contributions



that are transferred directly from any other plan qualified under sections 401(a) or 403(a) of the Code, whether such plans are funded through a trustee arrangement or through an annuity contract, if such contributions are attributable only to employer and employee contributions and the earnings thereon and accompanied by instructions showing the respective amounts attributable to employer and employee contributions. Such funds and the accumulation generated from them shall always be fully vested and nonforfeitable.

#### 4.6 ***Rollovers from other Plans.***

(a) Direct Rollovers. The Plan will accept a direct rollover of an eligible rollover distribution from:

- (i) A qualified plan described in section 401(a) or 403(a) of the Code including after-tax employee contributions.
- (ii) A tax sheltered annuity plan described in section 403(b) of the Code, excluding after-tax employee contributions.
- (iii) An eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.

(b) Participant Rollover Contributions from Other Plans. The Plan will accept a Participant contribution of an eligible rollover distribution from:

- (i) A qualified plan described in section 401(a) or 403(a) of the Code.
- (ii) A tax sheltered annuity plan described in section 403(b) of the Code.
- (iii) An eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.

(c) Participant Rollover Contributions from IRAs. The Plan will accept a Participant rollover contribution of the portion of a distribution from an individual retirement account or annuity described in section 408(a) or 408(b) of the Code that is eligible to be rolled over and would otherwise be includible in gross income.



**4.7 Military Service.** Notwithstanding any provision of this Plan to the contrary, contributions, benefits, and service credit with respect to qualified military service will be provided to the extent required by Code section 414(u).

(a) Effective January 1, 2009, for purposes of applying the limitations of Code section 415 as described in section 4.8 of the Plan, compensation includes differential wage payments. A "differential wage payment" is a payment which (1) is made by the Institution with respect to a period during which an individual is on active military duty for a period of more than 30 days, and (2) represents all or a portion of the wages the individual would have received from the Institution if the individual were performing service for the Institution, all as defined by Code section 3401(h)(2).

(b) Effective January 1, 2007, to the extent required by Code section 401(a)(37), if a Participant dies while performing qualified military service (within the meaning of Code section 414(u)(5)), the Participant shall be treated as having terminated employment with the Institution due to his death for purposes of any additional benefits (other than contributions relating to the period of qualified military service) provided under the Plan.

(c) Effective December 12, 1994, a Participant who returns to employment with the Institution as an Eligible Employee during the period within which reemployment rights are guaranteed by law may elect to contribute to the Plan all or a part of the contributions the Participant would have made to the Plan if the Participant had remained continuously employed by the Institution throughout the period of the Participant's qualified military service. The amount of contributions the Participant may make according to this subsection 4.7(c) shall be determined on the basis of the Participant's Compensation in effect immediately before the qualified military service and the terms of the Plan at that time. A Participant may make such contributions during a period beginning on the Participant's reemployment with the Institution and lasting for the shorter of five years or three times the Participant's period of qualified military service. To the extent the Participant makes contributions permitted by this subsection 4.7(c), the Participant's Accumulation Account will receive Institution contributions that would have been made during the same period.

**4.8 Maximum Plan Contributions.** Notwithstanding anything contained in this Plan to the contrary, the total Annual Additions made for any Participant for any year will not exceed the amount permitted under section 415 of the Code. The limitations of Code Section 415 are hereby incorporated by reference.

If the limitations are exceeded because the Participant is also participating in another plan required to be aggregated with this Plan for Code Section 415, then the extent to which annual contributions under this Plan will be reduced, as compared with the extent to which annual benefits or contributions under any other plans will be reduced, will be determined by the Institution in a manner as to maximize the aggregate benefits payable to the Participant from all plans. If the reduction is under this Plan, the Institution will advise affected Participants of any additional limitation on their annual contributions required by this paragraph.



Maximum Annual Addition. The annual addition that may be contributed or allocated to a Participant's account under the Plan for any limitation year shall not exceed the lesser of:

- (a) \$40,000, as adjusted for increases in the cost-of-living under section 415(d) of the Code, or
- (b) 100 percent of the Participant's compensation, within the meaning of section 415(c)(3) of the Code, for the limitation year.

The compensation limit referred to in (b) shall not apply to any contribution for medical benefits after separation from service (within the meaning of section 401(h) or section 419(f)(2) of the Code), if any, otherwise treated as an annual addition.



**Article V: Funding Vehicles**

5.1 ***Funding Vehicles.*** Plan Contributions are invested in one or more Funding Vehicles available to Participants under this Plan. The Fund Sponsors are:

- (a) Teachers Insurance and Annuity Association-College Retirement Equities Fund (TIAA-CREF)
- (b) Variable Annuity Life Insurance Company (VALIC)

Participants may choose any Funding Vehicle offered by a Fund Sponsor. The Institution's current selection of Fund Sponsors isn't intended to limit future additions or deletions of Fund Sponsors. Any additional accounts offered by a Fund Sponsor will automatically be made available to Participants in accordance with the procedures established by the Institution and the Fund Sponsor.

5.2 ***Fund Transfers.*** Subject to a Funding Vehicle's rules for transfers and in accordance with the provisions of the Code for maintaining the tax deferral of the Accumulation Account(s), a Participant may transfer funds accumulated under the Plan among the Plan's approved Funding Vehicles to the extent permitted by the Funding Vehicles.



**Article VI: Vesting**

- 6.1 ***Plan Contributions.*** Plan Contributions shall be fully vested and nonforfeitable when such Plan Contributions are made.



## Article VII: Benefits

- 7.1 **Retirement Benefits.** A Participant who has terminated employment may elect to receive retirement benefits under any of the forms of benefit, as provided below.

**Forms of Benefit.** The forms of benefit are the benefit options offered by the Funding Vehicles available under this Plan. These forms are equally available to all Participants choosing the Funding Vehicle. The forms of benefit available under this Plan include:

- (a) Single life annuities as provided under the Funding Vehicle contract.
- (b) Joint and survivor annuities as provided under the Funding Vehicle contract.
- (c) Cash withdrawals to the extent the Funding Vehicle permits.
- (d) Fixed period annuities, as permitted by the Funding Vehicle contract.
- (e) Retirement Transition Benefit.
- (f) Such other annuity and withdrawal options as provided under the Funding Vehicle contract.

- 7.2 **Retirement Transition Benefit.** Unless the Minimum Distribution Annuity, or the Limited Periodic Withdrawal Option is elected, a Participant may elect to receive a one-time lump-sum payment of up to 10 percent of his or her Accumulation Account(s) in TIAA and/or the CREF account(s) at the time annuity income begins, provided the one sum payment from each TIAA contract and/or CREF account(s) doesn't exceed 10 percent of the respective Accumulation Account(s) being converted to retirement income.

- 7.3 **Survivor Benefits.** If a Participant dies before the start of retirement benefit payments, the full current value of the Accumulation Account(s) is payable to the Beneficiary (ies) under the options offered by the Funding Sponsors. Distribution of Survivor Benefits is subject to the required distribution rules set forth in Code Section 401(a)(9).

- 7.4 **Application for Benefits.** Procedures for receipt of benefits are initiated by writing directly to the Fund Sponsor. Benefits will be payable by the Fund Sponsor upon receipt of a satisfactorily completed application for benefits and supporting documents. The necessary forms will be provided to the Participant, the surviving spouse, or the Beneficiary (ies) by the Fund Sponsor.

- 7.5 **Minimum Distribution Requirements.** No payment option may be selected by the Participant (or a Beneficiary) unless it satisfies the requirements of Code section 401(a)(9) (including the incidental death benefit requirements of Code section 401(a)(9)(G). and Treasury Regulations 1.409(a)(9)-1 through 1.401(a)(9)-8), all as applicable to governmental plans. The requirements of this section shall take precedence over any inconsistent provisions of the Plan. All distributions shall begin not later than the April 1 immediately following the calendar year in which the Participant reaches age 70 ½ or in which the



Participant subsequently retires from employment with the Institution ("Required Beginning Date").

- 7.6 **Direct Rollovers.** This section applies to distributions made on or after December 31, 2001. Notwithstanding any provision of the Plan to the contrary that would otherwise limit a distributee's election under this section, a distributee may elect, at the time and in the manner prescribed by the plan administrator, to have any portion of an eligible rollover distribution paid directly to an eligible retirement plan specified by the distributee in a direct rollover. A portion of a distribution shall not fail to be an eligible rollover distribution merely because the portion consists of after-tax employee contributions which are not includible in gross income. However, such portion may be transferred only to an individual retirement account or annuity described in section 408(a) or (b) of the Code, or to a qualified defined contribution plan described in section 401(a) or 403(a) of the Code that agrees to separately account for amounts so transferred, including separately accounting for the portion of such distribution which is includible in gross income and the portion of such distribution which is not so includible.

For this section, the following definitions apply:

- (a) **Eligible rollover distribution:** An eligible rollover distribution is any distribution of all or any portion of the balance to the credit of the distributee, except that an eligible rollover distribution does not include: any distribution that is one of a series of substantially equal periodic payments (not less frequently than annually) made for the life (or life expectancy) of the distributee or the joint lives (or joint life expectancies) of the distributee and the distributee's designated beneficiary, or for a specified period of ten years or more; any distribution to the extent such distribution is required under Code Section 401(a)(9); and the portion of any distribution that is not includable in gross income (determined without regard to the exclusion for net unrealized appreciation with respect to employer securities); and, for any distributions after 12/31/99, any hardship distribution described in Code Section 401(k)(2)(b)(i)(iv).
- (b) **Eligible retirement plan:** An eligible retirement plan is an individual retirement account described in Code Section 408(a), an individual retirement described in section 408(b) of the Code, or a qualified retirement plan described in Code Section 401 (a) or 403 (a) of the Code, that accepts the distributee's eligible rollover distribution, a tax sheltered annuity plan described in section 403(b) of the Code and an eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state and which agrees to separately account for amounts transferred into such plan from this Plan. Effective January 1, 2008, an eligible retirement



plan shall also mean a Roth IRA described in Code section 408A, subject to the adjusted gross income limits of Code section 408A(c)(3)(B), if applicable, and subject to the distribution rules of Code section 408A(d)(3). The definition of eligible retirement plan shall also apply in the case of a distribution to a surviving spouse, or to a spouse or former spouse who is the alternate payee under a qualified domestic relation order, as defined in section 414(p) of the Code.

- (c) **Distributee:** A distributee includes an employee or former Employee. In addition, the Employee's or former Employee's surviving spouse and the Employee's or former Employee's spouse or former spouse who is the alternate payee under a qualified domestic relations order, as defined in section 414(p) of the Code, are distributees with regard to the interest of the spouse or former spouse.
- (d) **Direct rollover:** A direct rollover is a payment by the Plan to the eligible retirement plan specified by the distributee.

7.7 ***Distribution to IRA of Nonspouse Beneficiary.*** A Participant's nonspouse Beneficiary may elect payment of any portion of the deceased Participant's account in a direct trustee to trustee transfer to an individual retirement account or annuity described in section 402(c)(8)(B)(i) or (ii) of the Code that is established to receive the Plan distribution on behalf of the Beneficiary. For purposes of this section, a trust maintained for the benefit of one or more designated beneficiaries may be the Beneficiary to the extent provided in rules prescribed by the Secretary of Treasury. If the Participant dies after the Participant's Required Beginning Date as defined in section 7.5, the required minimum distribution in the year of death may not be transferred according to this section. The requirements of section 402(c)(11) of the Code apply to distributions under this section.

7.8 ***Mandatory Distributions.*** The Plan shall make a mandatory distribution of a Participant's Account which is valued at \$1,000 or less at the time of distribution. Participant or Beneficiary consent to a mandatory distribution shall not be required. A mandatory distribution shall be made no earlier than 30 days from the date the Plan provides notice of the right to elect payment in a direct rollover, pursuant to Code section 402(f), and no later than an administratively feasible date following the end of the Plan Year in which the Participant's employment with the Employer terminates. Mandatory distributions shall be paid in a single lump sum cash payment.



**Article VIII: Administration**

- 8.1 ***Plan Administrator.*** The Idaho State Board of Education, located at 650 W. State Street Boise, Idaho 83720, is the administrator of this Plan and has designated the following as responsible for enrolling Participants, sending Plan contributions for each Participant to the Fund Sponsor(s) selected by a Participant, and for performing other duties required for the operation of the Plan:

Chief Fiscal Officer  
Office of the Idaho State Board of Education

Vice President for Finance and Administration  
Boise State University

Vice President for Finance and Administration  
Idaho State University

Vice President for Finance and Administration  
University of Idaho

Vice President for Finance and Administration  
Lewis-Clark State College

Vice President for Finance and Administration  
Eastern Idaho Technical College

Financial Vice President  
College of Southern Idaho

Financial Vice President  
North Idaho College

Vice President for Finance and Administration  
College of Western Idaho

- 8.2 ***Authority of the Institution.*** The Institution has all the powers and authority expressly conferred upon it herein and further shall have discretionary and final authority to determine all questions concerning eligibility and contributions under the Plan, to interpret and construe all terms of the Plan, including any uncertain terms, and to determine any disputes arising under and all questions concerning administration of the Plan. Any determination made by the Institution shall be given deference, if it is subject to judicial review, and shall be overturned only if it is arbitrary or capricious. In exercising these powers and authority, the Institution will always exercise good faith, apply standards of uniform application, and refrain from arbitrary action. The Institution may employ attorneys, agents, and accountants, as it finds necessary or advisable to assist it in carrying out its



duties. The Institution, by action of the Board, may designate a person or persons other than the Institution to carry out any of its powers, authority, or responsibilities. Any delegation will be set forth in writing.

- 8.3 **Action of the Institution.** Any act authorized, permitted, or required to be taken by the Institution under the Plan, which has not been delegated in accordance section 8.2 "Authority of the Institution," may be taken by a majority of the members of the Board, by vote at a meeting. All notices, advice, directions, certifications, approvals, and instructions required or authorized to be given by the Institution under the Plan will be in writing and signed by either (i) a majority of the members of the Board, or by any member or members as may be designated by the Board, as having authority to execute the documents on its behalf, or ii) a person who becomes authorized to act for the Institution in accordance with the provisions of section 8.2 "Authority of the Institution." Any action taken by the Institution that is authorized, permitted, or required under the Plan and is in accordance with Funding Vehicles contractual obligations are final and binding upon the Institution, and all persons who have or who claim an interest under the Plan, and all third parties dealing with the Institution.
- 8.4 **Indemnification.** Subject to the limits of the Idaho Tort Claims Act, Idaho Code §6-901 et. seq., The Institution will satisfy any liability actually and reasonably incurred by any members of the Board or any person to whom any power, authority or responsibility of the Institution is delegated pursuant to section 8.2 "Authority of the Institution" (other than the Fund Sponsors) arising out of any action (or inaction) relating to this plan. These liabilities include expenses, attorney's fees, judgments, fines, and amounts paid in connection with any threatened, pending or completed action, suit or proceeding related to the exercise (or failure to exercise) of this authority. This is in addition to whatever rights of indemnification exist under the articles of incorporation, regulations or by-laws of the Institution, under any provision of law, or under any other agreement.
- 8.5 **No Reversion.** Under no circumstances or conditions will any Plan Contributions of the Institution revert to, be paid to, or inure to the benefit of, directly or indirectly, the Institution. However, if Plan Contributions are made by the Institution by mistake of fact, these amounts may be returned to the Institution within one year of the date that they were made, at the option of the Institution.
- 8.6 **Statements.** The Institution will determine the total amount of contributions to be made for each Participant from time to time on the basis of its records and in accordance with the provisions of this Article. When each contribution payment is made by the Institution, the Institution will prepare a statement showing the name of each Participant and the portion of the payment that is made for him or her, and will deliver the statement to the appropriate Fund Sponsors with the contributions payment. Any determination by the Institution, evidenced by a statement delivered to the Fund Sponsors, is final and binding on all Participants, their Beneficiaries or contingent annuitants, or any other person or persons



claiming an interest in or derived from the contribution's payment.

- 8.7 **Reporting.** Records for each Participant under this Plan are maintained on the basis of the Plan Year. At least once a year the Fund Sponsors will send each Participant a report summarizing the status of his or her Accumulation Account(s) as of December 31 each year. Similar reports or illustrations may be obtained by a Participant upon termination of employment or at any other time by writing directly to the Fund Sponsors.



**Article IX: Amendment and Termination**

- 9.1 ***Amendment and Termination.*** While it is expected that this Plan will continue indefinitely, the Institution reserves the right to amend, otherwise modify, or terminate the Plan, or to discontinue any further contributions or payments under the Plan, by resolution of its Board. In the event of a termination of the Plan or complete discontinuance of Plan Contributions, the Institution will notify all Participants of the termination. As of the date of complete or partial termination, all Accumulation Accounts will become nonforfeitable to the extent that benefits are accrued.
- 9.2 ***Limitation.*** Notwithstanding the provisions of the "Amendment and Termination" section of Article IX, the following conditions and limitations apply:
- (a) No amendment will be made which will operate to recapture for the Institution any contributions previously made under this Plan. However, Plan Contributions made based on a mistake of fact may be returned to the Institution within one year of the date on which the Plan Contribution was made. Also, Plan Contributions made in contemplation of approval by the Internal Revenue Service may be returned to the Institution if the Internal Revenue Service fails to approve the Plan.
  - (b) No amendment will deprive, take away, or alter any then accrued right of any Participant insofar as Plan Contributions are concerned.



**Article X: Miscellaneous**

- 10.1 ***Plan Non-Contractual.*** Nothing in this Plan will be construed as a commitment or agreement on the part of any person to continue his or her employment with the Institution, and nothing in this Plan will be construed as a commitment on the part of the Institution to continue the employment or the rate of compensation of any person for any period, and all employees of the Institution will remain subject to discharge to the same extent as if the Plan had never been put into effect.
- 10.2 ***Claims of Other Persons.*** The provisions of the Plan will not be construed as giving any Participant or any other person, firm, entity, or corporation, any legal or equitable right against the Institution, its officers, employees, or directors, except the rights as specifically provided for in this Plan or created in accordance with the terms and provisions of this Plan.
- 10.3 ***Merger, Consolidation, or Transfers of Plan Assets.*** In the event of a merger or consolidation with, or transfer of assets to, another plan, each Participant will receive immediately after such action a benefit under the plan that is equal to or greater than the benefit he or she would have received immediately before a merger, consolidation, or transfer of assets or liabilities.
- 10.4 ***Finality of Determination.*** All determinations with respect to the crediting of Years of Service under the Plan are made on the basis of the records of the Institution, and all determinations made are final and conclusive upon employees, former employees, and all other persons claiming a benefit interest under the Plan. Notwithstanding anything to the contrary contained in this Plan, there will be no duplication of Years of Service credited to an employee for any one period of his or her employment.
- 10.5 ***Non-Alienation of Retirement Rights or Benefits.*** No benefit under the Plan may, at any time, be subject in any manner to alienation, encumbrance, the claims of creditors or legal process to the fullest extent permitted by law. No person will have power in any manner to transfer, assign, alienate, or in any way encumber his or her benefits under the Plan, or any part thereof, and any attempt to do so will be void and of no effect. However, this Plan will comply with any judgment, decree or order which establishes the rights of another person to all or a portion of a Participant's benefit under this Plan to the extent that it is a "qualified domestic relations order" under section 414(p) of the Code.
- 10.6 ***Governing Law.*** Except as provided under federal law, the provisions of the Plan are governed by and construed in accordance with the laws of the State of Idaho.



**Article XI: Trust Provisions**

- 11.1 **Establishment of Trust.** The Institution shall establish a Trust, pursuant to applicable law, to hold the assets of the Trust Fund (as defined below). By signing below, the Trustees agree to hold the assets of the Trust Fund, as constituted from time to time, in trust, and to administer the Trust Fund in accordance with the terms and conditions of the Trust provisions in this Article XI. The Trustees shall, at the direction of the Institution as named fiduciary of the Plan, be the owner of the custodial account pursuant to which mutual funds shall be made available under the Plan as investment options. The Trustees shall follow the proper directions of the Institution, as named fiduciary of the Plan, with respect to the investment and withdrawal of assets in the mutual funds provided such directions are made in accordance with the terms of the Plan and are not contrary to ERISA. The shares of such mutual funds in the custodial account shall constitute the "Trust Fund." TIAA-CREF annuity contracts or certificates (and any other annuity contracts that satisfy the requirements of §401(f) of the Code) shall not be part of the Trust Fund. It shall be prohibited at any time for any part of the Trust Fund (other than such amounts as are required or permitted to be used to pay Plan expenses) to be used for, or diverted to, purposes other than the exclusive benefit of Plan Participants and Beneficiaries except as otherwise permitted under the Code and ERISA.
- 11.2 **Nontransferability or Alienation of Benefits.** No right or interest of a Plan Participant or Beneficiary shall be (a) assignable or transferable in any manner, (b) subject to any lien, or (c) liable for, or subject to any obligation or liability of any person except as otherwise permitted under the Code and ERISA. The preceding sentence shall not apply to an assignment, transfer, or attachment pursuant to a qualified domestic relations order (as defined in section 414(p) of the Code) or to a lien or levy on behalf of the Internal Revenue Service.
- 11.3 **Trustees' Authority and Powers over Trust Fund.** Subject to any limitations imposed by § 4975 of the Code and § 406 of ERISA related to prohibited transactions:
- (a) The Trustees shall have the exclusive authority and custody over all Plan assets deposited in the Trust, except to the extent otherwise provided herein.
  - (b) The Trustees shall have the authority and power to make, execute, acknowledge and deliver any instruments that may be necessary or appropriate to carry out their powers.
  - (c) The Trustees shall have the authority to vote by proxy on any mutual fund shares constituting the Trust Fund. In voting such proxies, the Trustees shall follow the instructions of Plan Participants and their Beneficiaries. If no instructions for voting proxies applicable to mutual fund shares are



received, the Trustees shall not exercise the voting rights for such shares and will not be responsible for the failure to vote or instruct the vote of such shares.

- (d) The Trustees shall have full authority and power to do all acts whether or not expressly authorized which may be deemed necessary or proper for the protection of the Trust Fund including the exercise of any conversion privilege and/or mutual fund subscription rights.
- (e) The Trustees shall have full authority and power to sell, dispose, purchase, exchange or transfer any Trust Fund shares pursuant to the instructions of the Institution, including a return of Plan contributions to the Institution that is permitted under ERISA and the Plan. No provision of this Trust shall be construed to prevent the transfer of funds at the direction of Participants or Beneficiaries among the Plan Allocation Accounts.
- (f) The Trustees shall apply for beneficial ownership of the custodial account pursuant to the instructions of the Institution as named fiduciary under the Plan.

**11.4 Standard of Care.** The Trustees shall discharge their duties with the care, skill, prudence and diligence under the circumstances then prevailing that a prudent man acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims. No Trustee shall cause the Trust to engage in any prohibited transaction under ERISA.

**11.5 Payment of Benefits.** The Trustees shall take such actions as may be necessary to distribute Plan assets held in the Trust to Participants or Beneficiaries in accordance the instructions of the Institution under the Plan. Except as provided in the following sentence, the Trust shall not retain any part of the Accumulation Account due a Participant or Beneficiary. If the Trustees receive any claim to assets held in the Trust which is adverse to a Participant's interest or the interest of his or her Beneficiary, and the Institution as named fiduciary under the Plan, in its absolute discretion, decides the claim is, or may be, meritorious, the Institution may direct the Trustees, and the Trustees shall agree, to withhold distribution until the claim is resolved or until instructed by a court of competent jurisdiction. As an alternative, the Institution may direct the Trustees and the Trustees shall agree, to deposit all or any portion of the Participant's or Beneficiaries' interest in the Trust into the court. Deposit with the court shall relieve the Trustees of any further obligation with respect to the assets deposited. The Trustees have the right to be reimbursed from the Institution for legal fees and costs incurred.

**11.6 Reliance on Trustees as Owner.** No one dealing with the Trustees shall be bound to see to the application of any money paid or property transferred to or upon the order of the Trustees, or to inquire into the validity or propriety of anything the Trustees may purport to do.



- 11.7 **Reliance on Institution.** The Trustees may consult with the Institution or counsel designated by the Institution with respect to the meaning or construction of any provision of the Plan, a funding instrument which is an asset of the Trust, the Trustees' obligations or duties under this Article XI or with respect to any action or proceeding arising hereunder. To the extent permitted by law, the Trustees shall be fully protected both with respect to any action taken or omitted in good faith pursuant to the advice of the Institution or its counsel and in reliance upon any statement of fact made by the Institution.
- 11.8 **Accounting of the Trustees.** Within a reasonable period of time after the end of each Plan Year, and/or upon termination of the Trust, the Trustees shall submit to the Institution sufficient information requested by the Institution which is necessary for the Institution to carry out its respective duties under ERISA with respect to the Plan.
- 11.9 **Trustees' Records.**
- (a) The Trustees shall keep accurate and detailed accounts of all investments (if any), Plan assets, receipts, disbursements, and other transactions involving the Trust Fund (if any), not otherwise prepared by the custodian/record-keeper of the custodial account. All accounts, books and records relating to such transactions shall be open to inspection at all reasonable times by any person designated by the Institution.
  - (b) The Trustees shall submit copies of any statements or written communications received pertaining to the investment of any Plan assets constituting the Trust Fund to the Institution contemporaneously with their receipt by the Trustees.
- 11.10 **Annual Valuation.** The Trustees shall cause a valuation of the Trust Fund to be made as of the last day of each Plan Year and shall provide the Institution with a written report of such valuation within a reasonable period of time after the valuation is performed. On each valuation date the earnings and losses shall be allocated to the Accumulation Account of each Participant with interest in such asset in the ratio that the Participant's interest bears to the fair market value of the asset and the Institution shall receive written notice of the value of each Participant's account held in such asset. Such report shall be prepared by the custodian/record-keeper of the custodial account.
- 11.11 **Compensation of Trustee.** The Trustees shall receive such reasonable compensation for services as agreed to in writing by the Trustees and the Institution, except that no compensation shall be paid to an employee of the Institution or its subsidiaries for service as a Trustee.
- 11.12 **Expenses.** All expenses incurred in connection with the administration of the Plan, including but not limited to Trustees' fees, fees of appraisers and accountants (if any), and legal fees shall be paid by the Institution. All expenses of the Trust Fund (if any), shall be paid by the Institution.



- 11.13 Removal or Resignation of Trustee.** Any person may be removed as Trustee by the Institution at any time by notice in writing to such Trustee. Any person acting as Trustee hereunder may resign at any time upon 30 days notice in writing to the Institution. A resigning or removed Trustee shall transfer and deliver to the Institution all records of the Trust in his or her possession and shall deliver to their successor Trustees (or the Institution if there are no successor Trustees) all instruments of transfer or assignment, whereupon such Trustee shall have no further duties hereunder; provided, however, that nothing herein shall prevent any Trustee at any time from filing a judicial settlement and accounting with a court of competent jurisdiction. The only parties to such action shall be the Trustees and the Institution. A successor Trustee shall have no duty to examine the accounts, records, investments, or acts of any previous Trustee.
- 11.14 Appointment of Successor and Additional Trustees.** The Institution may at any time and from time to time appoint successor Trustees and/or additional Trustees. The appointment of a successor and/or an additional Trustee shall become effective upon such Trustee's written acceptance of such appointment agreeing to be bound by the provisions of this Article XI. Upon acceptance of the appointment, each successor and/or additional Trustee shall have all the powers and duties of a Trustee. Except to the extent otherwise provided under ERISA, no successor or additional Trustee shall be personally liable for any act or omission which occurred prior to the time he or she became a Trustee.
- 11.15 Actions of Trustees.** Except as otherwise provided herein, when there are two Trustees, both must join in taking an action. When more than two Trustees are serving hereunder, all powers of the Trustees shall be by the act of a majority of such persons. Notwithstanding the foregoing, a Trustee may in a signed writing delegate his power to one or more of the other Trustees. No delegation of power may be irrevocable. Notwithstanding the delegation of a power, any Trustee who releases a power shall be liable as a result of the exercise or non-exercise of said power in the same manner as if the power had not been delegated.
- 11.16 Trustees Liability and Protection.** To the extent permitted by applicable law:
- (a) The Trustees shall not be responsible for the adequacy of the Trust Fund to meet and discharge any and all payments and liabilities under the Plan or Trust. The Trustees shall be fully protected in acting upon any instrument, certificate, or payment believed to be genuine and to be signed or presented by the proper person or persons, and the Trustees shall be under no duty to make any investigation or inquiry as to any statement contained in any such writing but may accept the same as conclusive evidence of the truth and accuracy of the statements therein contained. Except as otherwise provided in Section 405 of ERISA, each Trustee shall be liable only for his or her own acts of fraud, negligence or willful misconduct and for losses or diminution in value that results from his or her own acts of fraud, negligence or willful misconduct.
  - (b) The responsibilities of the Trustees shall be limited to those duties specifically imposed upon them under the terms of this Article XI, and the Trustees shall not



be personally liable for the acts or omissions of any other fiduciary of the Plan, except as provided in ERISA.

- (c) Except to the extent otherwise provided in this Article XI, the Trustees shall not be responsible for the investment of any property delivered to, or held in the Trust. The Trustees shall not be liable for any losses sustained by the Trust Fund by reason of the purchase, sale, retention, transfer or exchange of any investment in accordance with the provisions of the instrument or instructions of the Institution, Plan Participants and Beneficiaries under the terms of the Plan.
- (d) To the extent permitted by law, the Trustees shall be fully protected in relying upon the advice of legal counsel or the Institution with respect to their duties under the Trust.
- (e) In addition to whatever rights of indemnification the Trustees may be entitled to under the articles of incorporation, regulations or by-laws of the Institution, under any provision of law, or under any other agreement, the Institution will satisfy any liability actually and reasonably incurred by any Trustee, including expenses, attorney's fees, judgments, fines, and amounts paid in settlement or in connection with any threatened, pending, or completed action, suit, or proceeding which is related to the exercise or failure to exercise of any of the powers, authority, responsibilities, or discretion of the Trustee as provided in this Article XI or which is reasonably believed by the Trustee to be provided hereunder or any action taken by such Trustee in connection with such reasonable belief.

**11.17 Documentation.** Any action by the Institution pursuant to this Article XI may be evidenced by writing over the signature of a person designated by the Institution in writing and the Trustees shall be fully protected in acting in accordance with such writing. Any action of the Trustees may be evidenced by a writing signed by such Trustee, and any party shall be fully protected in acting in accordance with such writing. Except to the extent otherwise provided, any notice to be given under this Article XI will be considered effective when received.

**11.18 Amendment.** The Institution may amend any provisions of this Article XI by submitting a copy of the amendment to each Trustee provided that no such amendment which affects the rights, duties or responsibilities of any Trustee may be made without his or her written consent.

**11.19 Termination.** The Trust shall continue in full force and effect for such time as may be necessary to accomplish the purposes for which it is created. If the Plan is terminated by the Institution, the Trust shall remain in existence until such time as all assets held in the Trust Fund have been distributed in accordance with the terms of the Plan.

**11.20 No Bond.** No original, successor or additional Trustee shall be required to furnish any bond except to the extent required by ERISA and other applicable law.



11.21 **Governing Law.** This Trust shall be construed and enforced according to the laws of the State of domicile of the Institution, and all provisions hereof shall be administered according to the laws of such State except to the extent such laws are superseded by ERISA. The determination that any provision of this Trust is not enforceable in accordance with its terms in a particular jurisdiction shall not affect the validity or enforceability of the remaining provisions of this Trust generally or in any other jurisdiction or as to any other parties, but rather such unenforceable provisions shall be stricken or modified in accordance with such determination only as to such parties and this Trust, as so modified, shall continue to bind the specific parties involved therein and otherwise all other parties in unmodified form.

*Employer Identification Number: -*  
*Plan Number: 001*

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(Signature of Plan Administrator)







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Idaho State Board of Education  
Optional Retirement Plan

A Defined Contribution Retirement Plan

Restated November 2001

Amendment 1, effective the first day of the first plan year beginning after December 31, 2001

Restated December 2003

Restated to include amendments through 2008

Restated December 2011

Restated effective January 2013



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**Article I: Definitions**

- 1.1 **Accumulation Account** means the separate account(s) established for each Participant. The current value of a Participant's Accumulation Account includes all Plan Contributions, less expense charges, and reflects credited investment experience.
- 1.2 **Annual Additions** means the sum of the following amounts credited to a Participant's Accumulation Account during the Limitation Year: (a) Plan Contributions; (b) forfeitures, if any; and (c) individual medical account amounts described in section 415(l)(2) and 419A(d)(2) of the Code, if any.
- 1.3 **Beneficiary (ies)** means the individual, institution, trustee, or estate designated by the Participant to receive the Participant's benefits at his or her death.
- 1.4 **Board** means the Idaho State Board of Education and Board of Regents of the University of Idaho as defined in Idaho Code §33-101.
- 1.5 **Code** means the Internal Revenue Code of 1986, as amended.
- 1.6 **Compensation** means an employee's total annual salary (inclusive of bonuses, overtime pay and overload pay, as applicable) paid in the Plan Year the amount reported as wages on the Participant's Form W-2, excluding compensation not currently included reduced by a compensation election deduction because of the application of Code Sections 125 or 403(b) or 457(b). Compensation does not include the following items (even if includible in gross income):
- (a) Contributions by employers to employee held medical savings accounts, as those accounts are defined in section 63-3022K, Idaho Code.
  - (b) Lump sum payments inconsistent with usual compensation patterns made by the employer to the employee only upon termination from service including, but not limited to, vacation payoffs and bonuses.
  - (c) Employer payments to employees for or related to travel, mileage, meals, lodging or subsistence expenses, without regard to the taxability of such payments for federal income tax purposes and without regard to the form of payment, including payment made as reimbursement of an itemized expense voucher and payment made of an unvouchered expense allowance.
  - (d) The value of a reduction in tuition provided by an educational institution to an employee which does not qualify for exclusion from the employee's wages because of the application of Code Section 117.
  - (e) Fringe benefits (cash and noncash).
  - (f) Moving expense reimbursements as defined in section 67-5337, Idaho Code.

Annual Compensation Limit. The annual compensation of each Participant taken into account in determining allocations for any plan year beginning after December 31, 2001, shall not exceed \$200,000, as adjusted for cost-of-living increases in accordance with section 401(a)(17)(B) of the Code. Annual compensation means compensation during the plan year or such other consecutive 12 month period over which



~~compensation is otherwise determined under the plan (the determination period). The cost-of-living adjustment in effect for a calendar year applies to annual compensation for the determination period that begins with or within such calendar year. In addition to other applicable limitations stated in the plan, and notwithstanding any other provision of the Plan to the contrary, for Plan years beginning on or after January 1, 1996, the annual compensation of each employee taken into account under the Plan shall not exceed the OBRA '93 annual compensation limit. The OBRA '93 annual compensation limit is \$150,000, as adjusted by the Commissioner of the Internal Revenue Service for increases in the cost of living in accordance with section 401(a)(17)(B) of the Internal Revenue Code. The cost of living adjustment in effect for a calendar year applies to any period, not exceeding 12 months, over which compensation is determined (determination period) beginning in such calendar year. If a determination period consists of fewer than 12 months, the OBRA '93 annual compensation limit will be multiplied by a fraction, the numerator of which is the number of months in the determination period, and the denominator of which is 12.~~

~~For Plan years beginning on or after January 1, 1996, any reference in this Plan to the limitation under section 401(a)(17) of the Code shall mean the OBRA '93 annual compensation limit stated in this provision.~~

If compensation for any prior determination period is taken into account in determining an employee's benefits accruing in the current Plan Year, the compensation for that prior determination period is subject to the OBRA '93 annual compensation limit in effect for that prior determination period. For this purpose, for determination periods beginning before the first day of the first Plan Year beginning on or after January 1, 1996 through December 31, 2001, the OBRA '93 annual compensation limit is \$150,000.

Notwithstanding the above, employees who became Participants in the Plan before the first day of the Plan Year beginning on or after January 1, 1996, will ~~not~~ be subject to the annual compensation limit in effect under the Plan before that date, as determined by IRS regulations.

- 1.7 ***Date of Employment or Reemployment*** means the effective date of the appointment for a faculty member or professional staff. For all other employees, the Date of Employment or Reemployment is the first day upon which an employee completes an Hour of Service for performance of duties during the employee's most recent period of service with the Institution.



1.8 **Eligible Employee** means faculty or nonclassified staff of the Office of the Idaho State Board of Education, Boise State University, Idaho State University, University of Idaho, or Lewis-Clark State College initially appointed or hired between July 1, 1990 and June 30, 1993 who work on a .50 full-time equivalency basis or more and similar employees hired before July 1, 1990 who elected to participate in the Plan during the 90 day period from July 1, 1990 to September 28, 1990; and teaching staff and officers of the Office of the Idaho State Board of Education, Boise State University, Idaho State University, University of Idaho, or Lewis-Clark State College initially appointed or hired on or after July 1, 1993 who work on a .50 full-time equivalency basis or more; and teaching staff and officers of the College of Southern Idaho, North Idaho College, College of Western Idaho, or Eastern Idaho Technical College initially appointed or hired on or after July 1, 1997 who work on a .50 full-time equivalency basis or more and similar employees hired before July 1, 1997 who elected to participate in the Plan during the 150 day period from July 1, 1997 to November 28, 1997. However, "Eligible Employee" shall exclude:

- (a) an Employee whose employment is expected to be less than five (5) months; and
- (b) an Employee whose employment is incidental to his or her status as a student at the Institution; and
- (c) an Employee who is vested in the Public Employee Retirement System of Idaho (PERSI) and who makes a one time irrevocable election to remain a member of that retirement system within 60 days of the date of initial hire or appointment.

The term Eligible Employee shall not include any leased employee deemed to be an employee of the Institution as ~~provided~~ provided in Code Section 414(n).

If an individual is classified as an independent contractor during any period of providing services to the Institution, such individual will be deemed to be in an ineligible class of employees for purposes of the Plan during such period, even if the individual is determined to be a common law employee during such period pursuant to a government audit or litigation. Notwithstanding the above, if the failure to cover such reclassified individual would prevent the Plan from satisfying the minimum coverage requirement under Code Section 410(b) for a Plan year, the minimum number of such individuals necessary for the plan to fulfill such minimum coverage requirements will be included as eligible employees for the plan year, with preference given to those reclassified individuals with the smallest amount of compensation.

No individual who is deemed to be an independent contractor, as determined by the Plan Administrator in its sole discretion, or individual performing services for the Employer pursuant to an agreement that provides that such individual shall not be eligible to participate in the retirement or other benefit plans of the Employer, shall be an Eligible Employee for purposes of this plan.

1.9 **Fund Sponsor** means an insurance, variable annuity or Investment Company that provides Funding Vehicles available to Participants under this Plan.

1.10 **Funding Vehicles** means the annuity contracts or custodial accounts that satisfy the



requirements of Code Section 401(f) issued for funding accrued benefits under this Plan and specifically approved by the Institution for use under this Plan.

**1.11 *Hours of Service means:***

- (a) Each hour for which an employee is paid, or entitled to payment, for the performance of duties for the Institution.
- (b) Each hour for which an employee is paid, or entitled to payment, on account of a period of time during which no duties are performed (regardless of whether employment has terminated) due to vacation, holiday, illness, incapacity (including disability), layoff, jury duty, military duty, leave of absence, or maternity or paternity leave (whether paid or unpaid). However, any period for which a payment is made or due under a plan maintained solely for the purpose of complying with Workers' Compensation or unemployment compensation or disability insurance laws, or solely to reimburse the employee for medical or medically-related expenses is excluded. An employee is directly or indirectly paid, or entitled to payment by the Institution regardless of whether payment is made by or due from the Institution directly or made indirectly through a trust fund, insurer or other entity to which the Institution contributes or pays premium. No more than 501 Hours of Service will be credited under this paragraph. Hours of Service under this paragraph will be calculated and credited pursuant to Section 2530.200b-2 of the Department of Labor Regulations, incorporated herein by reference.
- (c) Each hour for which back pay, irrespective of mitigation of damages, is either awarded or agreed to by the Institution, without duplication of hours provided above, and subject to the 501-hour restriction for periods described in (b) above.

Hours of Service will be credited for employment with other members of an affiliated service group (under Code Section 414(m)), a controlled group of corporations (under Code Section 414(b)), or a group of trades or businesses under common control (under Code Section 414(c)) of which the Institution is a member, and any other entity required to be aggregated with the employer pursuant to Code Section 414(o) and the regulations thereunder. Hours of Service also will be credited for any person considered an employee for this Plan under Code Sections 414(n) or 414(o) and the regulations thereunder.

Hours of Service will be determined on the basis of actual hours that an employee is paid or entitled to payment.

**1.12 *Institution* means the Board and employment units under its jurisdiction, namely:**

The Office of the Idaho State Board of Education  
 Boise State University  
 Idaho State University  
 University of Idaho  
 Lewis-Clark State College



Eastern Idaho Technical College  
College of Southern Idaho  
North Idaho College  
College of Western Idaho

- 1.13 ***Institution Plan Contributions*** means contributions made by the Institution under this Plan.
- 1.14 ***Limitation Year*** means a calendar year.
- 1.15 ***Normal Retirement Age*** means age 65.
- 1.16 ***Participant*** means any Eligible Employee of the Institution participating in this Plan.
- 1.17 ***Participant Plan Contributions*** means contributions made by a Participant under this Plan. Participant Plan Contributions are designated as being picked-up by the Institution in lieu of contributions by the Participant, in accordance with Code Section 414(h)(2). The pick-up amounts cannot be received directly by the Participant and are required to be made.



- 1.18 **Plan** means the Idaho State Board of Education Optional Retirement Plan as set forth in this document, and pursuant to Idaho Code §33-107A and 33-107B.
- 1.19 **Plan Contributions** means the combination of Participant Plan Contributions and Institution Plan Contributions.
- 1.20 **Plan Entry Date** means the later of the Effective Date of the Plan or the Eligible Employee's Date of Employment or Reemployment.
- 1.21 **Plan Year** means January 1 through December 31.
- 1.22 **Year of Service** means a 12-month period (computation period) during which the Eligible Employee completes 1,000 or more Hours of Service.



**Article II: Establishment of Plan**

- 2.1 ***Establishment of Plan.*** The Idaho State Legislature authorized the Board to establish the Plan as of July 1, 1990.

This Plan document sets forth the provisions of this Code Section 401(a) Plan. The Plan was restated as of November 1, 2001. Plan Contributions are invested, at the direction of each Participant, in one or more of the Funding Vehicles available to Participants under the Plan. Plan Contributions shall be held for the exclusive benefit of Participants. Participant Plan Contributions are designated as being picked-up by the Institution in lieu of contributions by the Participant, in accordance with Code Section 414(h)(2).

It is intended that this Plan will not be subject to the requirements of ERISA under Department of Labor Regulation Section 2510.3-2(f).



**Article III: Eligibility for Participation**

- 3.1 **Eligibility.** An Eligible Employee must, as a condition of employment, begin participation in this Plan on the Plan Entry Date following employment at the Institution.
- 3.2 **Notification.** The Institution will notify an Eligible Employee when he or she has completed the requirements necessary to become a Participant. An Eligible Employee who complies with the requirements and becomes a Participant is entitled to the benefits and is bound by all the terms, provisions, and conditions of this Plan, including any amendments that, from time to time, may be adopted, and including the terms, provisions and conditions of any Funding Vehicle(s) to which Plan Contributions for the Participant have been applied.
- 3.3 **Enrollment in Plan.** To participate in this Plan, an Eligible Employee must complete the necessary enrollment form(s) and return them to the Institution. An employee who has been notified that he or she is eligible to participate but who fails to return the enrollment forms will be deemed to have waived all of his or her rights under the Plan except the right to enroll at a future date.
- 3.4 **Reemployment.** A former employee who is reemployed by the Institution will be eligible to participate upon meeting the requirements stated in the "Eligibility" section of Article III. A former employee who satisfied these requirements before termination of employment will be eligible to begin participation immediately after reemployment provided the former employee is an Eligible Employee.
- 3.5 **Termination of Participation.** A Participant will continue to be eligible for the Plan until one of the following conditions occur:
- he or she ceases to be an Eligible Employee;
  - the Plan is terminated.



## Article IV: Plan Contributions

- 4.1 **Plan Contributions.** Plan Contributions will be made for Eligible Employees who have satisfied the requirements of Article III as follows:

Each Institution shall contribute the percentage indicated below of the Compensation of that Institution's Participants, reduced by the amount necessary, if any, to provide contributions to a total disability program, but in no event less than five percent (5%) of each Participant's Compensation:

NIC, CSI, CWI and EITC: ~~seven and eighty-one one hundredths percent (7.81%)~~ an amount equal to the Public Employee Retirement System of Idaho (PERSI) contributions rates;

UI, BSU, ISU, LCSC and the Office of the State Board of Education: nine and thirty-five one hundredths percent (9.35%) ~~effective July 1, 2007; seven and eighty-one one hundredths percent (7.81%) prior to July 1, 2007;~~ and

Each Participant shall contribute an amount equal to six and ninety-seven hundredths percent (6.97%) of his or her Compensation.

Plan Contribution rates are defined in Idaho Code §33-107A and §33-107B and are subject to change as ~~that those~~ sections are amended.

Plan Contributions are considered to be credited to Participants no later than the last day of the Plan Year for which the Plan Contributions are made.

- 4.2 **When Contributions Are Made.** Plan Contributions will begin when the Institution has determined that the Participant has met or will meet the requirements of Article III. Any part of a year's Plan Contributions not contributed before this determination will be included in contributions made for that year after the determination. Plan Contributions will be forwarded to the Fund Sponsor(s) in accordance with the procedures established by the Institution. Institution Plan Contributions will be forwarded to the Fund Sponsor(s) at least annually. Participant Plan Contributions will be forwarded by the Institution to the Fund Sponsor(s) as soon as it is administratively feasible for the Institution to segregate contributions, but in any event, within the time required by law.
- 4.3 **Allocation of Contributions.** A Participant may allocate Plan Contributions to the Funding Vehicle(s) in any whole-number percentages that equal 100 percent. A Participant may change his or her allocation of future contributions to the Funding Vehicle(s) according to the administrative procedures of the Fund Sponsor(s). A Participant may direct contributions to only one Fund Sponsor at any given time. However, a Participant may change Fund Sponsors once per calendar year by completing the appropriate forms provided by the Institution.
- 4.4 **Leave of Absence.** During a paid leave of absence, Plan Contributions will continue to be made for a Participant on the basis of Compensation then being paid by the Institution. No Plan Contributions will be made during an unpaid leave of absence.



- 4.5 ***Transfer of Funds from Another Plan.*** The Fund Sponsor shall accept contributions that are transferred directly from any other plan qualified under sections 401(a) or 403(a) of the Code, whether such plans are funded through a trustee arrangement or through an annuity contract, if such contributions are attributable only to employer and employee contributions and the earnings thereon and accompanied by instructions showing the respective amounts attributable to employer and employee contributions. Such funds and the accumulation generated from them shall always be fully vested and nonforfeitable.

- 4.6 ~~***Acceptance of Rollover Contributions.*** If a Participant is entitled to receive a distribution from another plan qualified under sections 401(a) or 403(a) of the Code that is an eligible rollover distribution under section 402 of the Code, the Fund Sponsor will accept such amount under this Plan provided the rollover to this Plan is made 1) directly from another plan; or 2) by the Participant within 60 days of the receipt of the distribution.~~

**Rollovers from other Plans.**

(a) Direct Rollovers. The Plan will accept a direct rollover of an eligible rollover distribution from:

- (i) A qualified plan described in section 401(a) or 403(a) of the Code including after-tax employee contributions.
- (ii) A tax sheltered annuity plan described in section 403(b) of the Code, excluding after-tax employee contributions.
- (iii) An eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.

(b) Participant Rollover Contributions from Other Plans. The Plan will accept a Participant contribution of an eligible rollover distribution from:

- (i) A qualified plan described in section 401(a) or 403(a) of the Code.
- (ii) A tax sheltered annuity plan described in section 403(b) of the Code.
- (iii) An eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.

(c) Participant Rollover Contributions from IRAs. The Plan will accept a Participant rollover contribution of the portion of a distribution from an individual retirement account or annuity described in section 408(a) or 408(b) of the Code that is eligible to be rolled over and would otherwise be includible in gross income.



- 4.7 ***Military Service.*** Notwithstanding any provision of this Plan to the contrary, contributions, benefits, and service credit with respect to qualified military service will be provided to the extent required by Code section 414(u).

(a) Effective January 1, 2009, for purposes of applying the limitations of Code section 415 as described in section 4.8 of the Plan, compensation includes differential wage payments. A "differential wage payment" is a payment which (1) is made by the Institution with respect to a period during which an individual is on active military duty for a period of more than 30 days, and (2) represents all or a portion of the wages the individual would have received from the Institution if the individual were performing service for the Institution, all as defined by Code section 3401(h)(2).

(b) Effective January 1, 2007, to the extent required by Code section 401(a)(37), if a Participant dies while performing qualified military service (within the meaning of Code section 414(u)(5)), the Participant shall be treated as having terminated employment with the Institution due to his death for purposes of any additional benefits (other than contributions relating to the period of qualified military service) provided under the Plan.

(c) Effective December 12, 1994, a Participant who returns to employment with the Institution as an Eligible Employee during the period within which reemployment rights are guaranteed by law may elect to contribute to the Plan all or a part of the contributions the Participant would have made to the Plan if the Participant had remained continuously employed by the Institution throughout the period of the Participant's qualified military service. The amount of contributions the Participant may make according to this subsection 4.7(c) shall be determined on the basis of the Participant's Compensation in effect immediately before the qualified military service and the terms of the Plan at that time. A Participant may make such contributions during a period beginning on the Participant's reemployment with the Institution and lasting for the shorter of five years or three times the Participant's period of qualified military service. To the extent the Participant makes contributions permitted by this subsection 4.7(c), the Participant's Accumulation Account will receive Institution contributions that would have been made during the same period.

- 4.8 ***Maximum Plan Contributions.*** Notwithstanding anything contained in this Plan to the contrary, the total Annual Additions made for any Participant for any year will not exceed the amount permitted under section 415 of the Code. The limitations of Code Section 415 are hereby incorporated by reference.

If the limitations are exceeded because the Participant is also participating in another plan required to be aggregated with this Plan for Code Section 415, then the extent to which annual contributions under this Plan will be reduced, as compared with the extent to which annual benefits or contributions under any other plans will be reduced, will be determined by the Institution in a manner as to maximize the aggregate benefits payable to the Participant from all plans. If the reduction is under this Plan, the Institution will advise affected Participants of any additional limitation on their annual contributions required by this paragraph.



Maximum Annual Addition. The annual addition that may be contributed or allocated to a Participant's account under the Plan for any limitation year shall not exceed the lesser of:

(a) \$40,000, as adjusted for increases in the cost-of-living under section 415(d) of the Code, or

(b) 100 percent of the Participant's compensation, within the meaning of section 415(c)(3) of the Code, for the limitation year.

The compensation limit referred to in (b) shall not apply to any contribution for medical benefits after separation from service (within the meaning of section 401(h) or section 419(f)(2) of the Code), if any, otherwise treated as an annual addition.



**Article V: Funding Vehicles**

5.1 ***Funding Vehicles.*** Plan Contributions are invested in one or more Funding Vehicles available to Participants under this Plan. The Fund Sponsors are:

- (a) Teachers Insurance and Annuity Association-College Retirement Equities Fund (TIAA-CREF)
- (b) Variable Annuity Life Insurance Company (VALIC)

Participants may choose any Funding Vehicle offered by a Fund Sponsor. The Institution's current selection of Fund Sponsors isn't intended to limit future additions or deletions of Fund Sponsors. Any additional accounts offered by a Fund Sponsor will automatically be made available to Participants in accordance with the procedures established by the Institution and the Fund Sponsor.

5.2 ***Fund Transfers.*** Subject to a Funding Vehicle's rules for transfers and in accordance with the provisions of the Code for maintaining the tax deferral of the Accumulation Account(s), a Participant may transfer funds accumulated under the Plan among the Plan's approved Funding Vehicles to the extent permitted by the Funding Vehicles.



**Article VI: Vesting**

- 6.1 ***Plan Contributions.*** Plan Contributions shall be fully vested and nonforfeitable when such Plan Contributions are made.



## Article VII: Benefits

7.1 **Retirement Benefits.** A Participant who has terminated employment may elect to receive retirement benefits under any of the forms of benefit, as provided below.

**Forms of Benefit.** The forms of benefit are the benefit options offered by the Funding Vehicles available under this Plan. These forms are equally available to all Participants choosing the Funding Vehicle. The forms of benefit available under this Plan include:

- (a) Single life annuities as provided under the Funding Vehicle contract.
- (b) Joint and survivor annuities as provided under the Funding Vehicle contract.
- (c) Cash withdrawals ~~(to the extent the Funding Vehicle permits and subject to the limitations in the "Cash Withdrawal" section of this Article).~~
- (d) Fixed period annuities, as permitted by the Funding Vehicle contract.
- (e) Retirement Transition Benefit.
- (f) Such other annuity and withdrawal options as provided under the Funding Vehicle contract.

~~7.2 **Cash Withdrawals.** A Participant who has terminated employment may withdraw Participant Plan Contributions or receive benefits in any form the relevant Funding Vehicle permits, including a cash withdrawal.~~

~~Except, following retirement or termination of employment prior to age 55, if total accumulation is less than or equal to \$15,000, both Participant and Institution Plan Contributions are available in a cash withdrawal subject to any restrictions of the Funding Vehicles of the Fund Sponsor.~~

7.32 **Retirement Transition Benefit.** Unless the Minimum Distribution Annuity, or the Limited Periodic Withdrawal Option is elected, a Participant may elect to receive a one-time lump-sum payment of up to 10 percent of his or her Accumulation Account(s) in TIAA and/or the CREF account(s) at the time annuity income begins, provided the one sum payment from each TIAA contract and/or CREF account(s) doesn't exceed 10 percent of the respective Accumulation Account(s) being converted to retirement income.

7.43 **Survivor Benefits.** If a Participant dies before the start of retirement benefit payments, the full current value of the Accumulation Account(s) is payable to the Beneficiary (ies) under the options offered by the Funding Sponsors. Distribution of Survivor Benefits is subject to the required distribution rules set forth in Code Section 401(a)(9).

7.54 **Application for Benefits.** Procedures for receipt of benefits are initiated by writing directly to the Fund Sponsor. Benefits will be payable by the Fund Sponsor upon receipt of a satisfactorily completed application for benefits and supporting documents. The necessary forms will be provided to the Participant, the surviving spouse, or the Beneficiary (ies) by the Fund Sponsor.



**7.65 Minimum Distribution Requirements.** No payment option may be selected by the Participant (or a Beneficiary) unless it satisfies the requirements of Code section 401(a)(9) (including the incidental death benefit requirements of Code section 401(a)(9)(G). and Treasury Regulations 1.409(a)(9)-1 through 1.401(a)(9)-8, all as applicable to governmental plans. The requirements of this section shall take precedence over any inconsistent provisions of the Plan. All distributions shall begin not later than the April 1 immediately following the calendar year in which the Participant reaches age 70 ½ or in which the Participant subsequently retires from employment with the Institution ("Required Beginning Date").

~~The provisions of this Section will apply for purposes of determining required minimum distributions for calendar years beginning with the 2003 calendar year. The requirements of this Section shall apply to any distribution of a Participant's vested Accumulation Account(s) and will take precedence over any inconsistent provisions of this Plan. Distributions in all cases will be made in accordance with Code Section 401(a)(9) and the regulations promulgated thereunder.~~

~~(a) Time and Manner of Distribution.~~

~~(i) Required Beginning Date. The participant's entire interest shall be distributed, or begin to be distributed, to the Participant no later than the Participant's Required Beginning Date.~~

~~(ii) Death of Participant Before Distributions Begin. If the Participant dies before distributions begin, the Participant's entire interest shall be distributed, or begin to be distributed, no later than as follows:~~

~~(1) If the participant's surviving spouse is the Participant's sole designated Beneficiary, then distributions to the surviving spouse shall begin by December 31 of the calendar year immediately following the calendar year in which the Participant died, or by December 31 of the calendar year in which the Participant would have attained age 70½, if later.~~

~~(2) If the participant's surviving spouse is not the Participant's sole designated beneficiary, then distributions to the designated beneficiary shall begin by December 31 of the calendar year immediately following the calendar year in which the Participant died.~~

~~(3) If there is no designated Beneficiary as of September 30 of the year following the year of the Participant's death, the Participant's entire interest shall be distributed by December 31 of the calendar year containing the fifth anniversary of the Participant's death.~~

~~(4) If the Participant's surviving spouse is the Participant's sole designated Beneficiary and the surviving spouse dies after the Participant but before~~



~~distributions to the surviving spouse begin, this subsection (a)(ii), other than subsection (a)(ii)(1), will apply as if the surviving spouse were the Participant.~~

~~For purposes of subsections (a)(ii) and (c), unless subsection (a)(ii)(4) applies, distributions are considered to begin on the Participant's Required Beginning Date. If subsection (a)(ii)(4) applies, distributions are considered to begin on the date distributions are required to begin to the surviving spouse under subsection (a)(ii)(1). If distributions under an annuity purchased from an insurance company irrevocably commence to the Participant before the Participant's Required Beginning Date (or to the Participant's surviving spouse before the date distributions are required to begin to the surviving spouse under subsection (a)(ii)(1), the date distributions are considered to begin is the date distributions actually commence.~~

~~(iii) **Forms of Distribution.** Unless the Participant's interest is distributed in the form of an annuity purchased from an insurance company or in a single sum on or before the Required Beginning Date, as of the first distribution calendar year distributions shall be made in accordance with subsections (b) and (c) of this Section. If the Participant's interest is distributed in the form of an annuity purchased from an insurance company, distributions thereunder will be made in accordance with the requirements of Code Section 401(a)(9) and the Treasury Regulations.~~

~~(b) **Required Minimum Distributions During Participant's Lifetime.**~~

~~(i) **Amount of Required Minimum Distribution for Each Distribution Calendar Year.** During the Participant's lifetime, the minimum amount that will be distributed for each distribution calendar year is the lesser of:~~

~~(1) the quotient obtained by dividing the Participant's account balance by the distribution period in the Uniform Lifetime Table set forth in Treasury Regulation Section 1.401(a)(9)-9, using the Participant's age as of the Participant's birthday in the distribution calendar year; or~~

~~(2) if the Participant's sole designated Beneficiary for the distribution calendar year is the Participant's spouse, the quotient obtained by dividing the Participant's account balance by the number in the Joint and Last Survivor Table set forth in Treasury Regulation Section 1.401(a)(9)-9, using the Participant's and spouse's attained ages as of the Participant's and spouse's birthdays in the distribution calendar year.~~

~~(ii) **Lifetime Required Minimum Distribution Through Year of Participant's Death.** Required minimum distributions will be determined under this subsection (b) beginning with the first distribution calendar year and up to and including the distribution calendar year that includes the Participant's date of death.~~

~~(c) **Required Minimum Distributions After Participant's Death**~~



~~(i) — Death On or After Date Distributions Begin.~~

~~(1) — Participant Survived by Designated Beneficiary. If the Participant dies on or after the date distributions begin and there is a designated beneficiary, the minimum amount that will be distributed for each distribution calendar year after year of the Participant's death is the quotient obtained by dividing the Participant's account balance by the longer of the remaining life expectancy of the Participant or the remaining life expectancy of the Participant's designated beneficiary, determined as follows:~~

~~(a) — The Participant's remaining life expectancy is calculated using the age of the Participant in the year of death, reduced by one for each subsequent year.~~

~~(b) — If the Participant's surviving spouse is the Participant's sole designated beneficiary, the remaining life expectancy of the surviving spouse is calculated for each distribution calendar year after the year of the Participant's death using the surviving spouse's age as of the spouse's birthday in that year. For distribution calendar years after the year of the surviving spouse's death, the remaining life expectancy of the surviving spouse is calculated using the age of the surviving spouse as of the spouse's birthday in the calendar year of the spouse's death, reduced by one for each subsequent calendar year.~~

~~(c) — If the Participant's surviving spouse is not the Participant's sole designated beneficiary, the designated beneficiary's remaining life expectancy is calculated using the age of the beneficiary in the year following the year of the Participant's death, reduced by one for each subsequent year.~~

~~(2) — No Designated Beneficiary. If the Participant dies on or after the date distributions begin and there is no designated beneficiary as of September 30 of the year after the year of the Participant's death, minimum amount that shall be distributed for each distribution calendar year after the year of the Participant's death is the quotient obtained by dividing the Participant's account balance by the Participant's remaining life expectancy calculated using the age of the Participant in the year of death, reduced by one for each subsequent year.~~

~~(ii) — Death Before Date Distributions Begin~~

~~(1) — Participant Survived by Designated Beneficiary. If the Participant dies before the date distributions begin and there is a designated beneficiary, the minimum amount that shall be distributed for each distribution calendar year after the year of the Participant's death is the quotient obtained by dividing the Participant's account balance by the remaining life expectancy of the Participant's designated beneficiary, determined as provided in subsection (c)(i).~~

~~(2) — No Designated Beneficiary. If the Participant dies before the date distributions begin and there is no designated beneficiary as of September 30 of the year following the year of the Participant's death, distribution of the Participant's entire~~



~~interest shall be completed by December 31 of the calendar year containing the fifth anniversary of the Participant's death.~~

- ~~(3) **Death of Surviving Spouse Before Distributions to Surviving Spouse are Required to Begin.** If the Participant dies before the date distributions begin, the Participant's surviving spouse is the Participant's sole designated beneficiary, and the surviving spouse dies before distributions are required to begin to the surviving spouse under subsection (a)(ii)(1), this subsection (c)(ii) shall apply as if the surviving spouse were the Participant.~~
- ~~(d) **Definitions**~~
- ~~(i) **Designated Beneficiary.** The individual who is designated as the Beneficiary under the Plan and is the designated Beneficiary under Code Section 401(a)(9) and Treasury Regulation Section 1.401(a)(9)-1, Q&A-4.~~
- ~~(ii) **Distribution calendar year.** A calendar year for which a minimum distribution is required. For distributions beginning before the Participant's death, the first distribution calendar year is the calendar year immediately preceding the calendar year which contains the Participant's Required Beginning Date. For distributions beginning after the Participant's death, the first distribution calendar year is the calendar year in which distributions are required to begin under subsection (a)(ii). The required minimum distribution for the Participant's first distribution calendar year shall be made on or before the Participant's Required Beginning Date. The required minimum distribution for other distribution calendar years, including the required minimum distribution for the distribution calendar year in which the Participant's Required Beginning Date occurs, will be made on or before December 31 of that distribution calendar year.~~
- ~~(iii) **Life Expectancy.** Life expectancy as computed by use of the Single Life Table in Treasury Regulation Section 1.401(a)(9)-9.~~
- ~~(iv) **Participant's Account Balance.** The Participant's account balance as of the last valuation date in the calendar year immediately preceding the distribution calendar year (valuation calendar year) increased by the amount of any contributions made and allocated or forfeitures allocated to the Participant's account balance as of dates in the valuation calendar year after the valuation date and decreased by distributions made in the valuation calendar year after the valuation date. The Participant's account balance for the valuation calendar year includes any amounts rolled over or transferred to the Plan either in the valuation calendar year or in the distribution calendar year if distributed or transferred in the valuation calendar year.~~
- ~~(v) **Required Beginning Date.** The Required Beginning Date of a Participant is April 1 following the calendar year in which the Participant attains age 70½ or if later, April 1 following the calendar year in which the Participant retires.~~



~~(e) Election to Allow Participants, Former Participants or Beneficiaries to Elect 5-Year Rule.~~

~~Participants or beneficiaries may elect on an individual basis whether the 5-year rule or the life expectancy rule in subsections (a)(ii) and (c)(ii) applies to distributions after the death of a Participant who has a designated beneficiary. The election must be made no later than the earlier of September 30 of the calendar year in which distribution would be required to begin under Subsection (a)(ii), or by September 30 of the calendar year which contains the fifth anniversary of the Participant's (or, if applicable, surviving spouse's) death. If neither the Participant nor beneficiary makes an election under this paragraph, distributions will be made in accordance with subsection (a)(ii) and (c)(ii).~~

~~(f) Election to Allow Designated Beneficiary Receiving Distributions Under 5-Year Rule to Elect Life Expectancy Distributions.~~

~~A designated beneficiary who is receiving payments under the 5-year rule may make a new election to receive payments under the life expectancy rule until December 31, 2003, provided that all amounts that would have been required to be distributed under the life expectancy rule for all distribution calendar years before 2004 are distributed by the earlier of December 31, 2003 or the end of the 5-year period.~~

~~7.7 **Small Sum Payments.** A participant's accumulations may be received in a single sum if certain conditions are met. If a Participant in this Plan terminates employment with the Institution and requests that the Fund Sponsor pay his or her Group Retirement Annuity accumulation in a single sum, the Institution will approve such request if, at the time of the request, the following conditions apply:~~

~~— (a) The total Accumulation Account is \$2,000 or less.~~

~~(a) The total accumulation Account attributable to Plan Contributions is not more than \$4,000.~~

~~— Upon request for the small sum payment, the total Accumulation Account will be payable by the Fund Sponsor to the Participant in a lump sum and will be in full satisfaction of the Participant's rights and his or her spouse's rights to retirement or survivor benefits.~~

~~7.86~~ **Direct Rollovers.** This section applies to distributions made on or after ~~January 1, 1993~~December 31, 2001. Notwithstanding any provision of the Plan to the contrary that would otherwise limit a distributee's election under this section, a distributee may elect, at the time and in the manner prescribed by the plan administrator, to have any portion of an eligible rollover distribution paid directly to an eligible retirement plan specified by the distributee in a direct rollover. A



portion of a distribution shall not fail to be an eligible rollover distribution merely because the portion consists of after-tax employee contributions which are not includible in gross income. However, such portion may be transferred only to an individual retirement account or annuity described in section 408(a) or (b) of the Code, or to a qualified defined contribution plan described in section 401(a) or 403(a) of the Code that agrees to separately account for amounts so transferred, including separately accounting for the portion of such distribution which is includible in gross income and the portion of such distribution which is not so includible.

For this section, the following definitions apply:

- (a) Eligible rollover distribution: An eligible rollover distribution is any distribution of all or any portion of the balance to the credit of the distributee, except that an eligible rollover distribution does not include: any distribution that is one of a series of substantially equal periodic payments (not less frequently than annually) made for the life (or life expectancy) of the distributee or the joint lives (or joint life expectancies) of the distributee and the distributee's designated beneficiary, or for a specified period of ten years or more; any distribution to the extent such distribution is required under Code Section 401(a)(9); and the portion of any distribution that is not includable in gross income (determined without regard to the exclusion for net unrealized appreciation with respect to employer securities)-; and, for any distributions after 12/31/99, any hardship distribution described in Code Section 401(k)(2)(b)(i)(iv).
- (b) Eligible retirement plan: An eligible retirement plan is an individual retirement account described in Code Section 408(a), an individual retirement described in section 408(b) of the Code, or a qualified retirement plan described in Code Section 401 (a) or 403 (a) of the Code, that accepts the distributee's eligible rollover distribution, a tax sheltered annuity plan described in section 403(b) of the Code and an eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state and which agrees to separately account for amounts transferred into such plan from this Plan. ~~However, in the case of an eligible rollover distribution to the surviving spouse, an eligible retirement plan is an individual retirement account or individual retirement annuity.~~ Effective January 1, 2008, an eligible retirement plan shall also mean a Roth IRA described in Code section 408A, subject to the adjusted gross income limits of Code section 408A(c)(3)(B), if applicable, and subject to the distribution rules of Code section 408A(d)(3). The definition of eligible retirement plan shall also apply in the case of a distribution to a surviving spouse, or to a spouse or former spouse who is the alternate payee under a qualified domestic relation order, as defined in section 414(p) of the Code.



- (c) Distributee: A distributee includes an employee or former Employee. In addition, the Employee's or former Employee's surviving spouse and the Employee's or former Employee's spouse or former spouse who is the alternate payee under a qualified domestic relations order, as defined in section 414(p) of the Code, are distributees with regard to the interest of the spouse or former spouse.
- (d) Direct rollover: A direct rollover is a payment by the Plan to the eligible retirement plan specified by the distributee.

**7.97 *Distribution to IRA of Nonspouse Beneficiary.*** A Participant's nonspouse Beneficiary may elect payment of any portion of the deceased Participant's account in a direct trustee to trustee transfer to an individual retirement account or annuity described in section 402(c)(8)(B)(i) or (ii) of the Code that is established to receive the Plan distribution on behalf of the Beneficiary. For purposes of this section, a trust maintained for the benefit of one or more designated beneficiaries may be the Beneficiary to the extent provided in rules prescribed by the Secretary of Treasury. If the Participant dies after the Participant's ~~Required beginning~~ **beginning** ~~date~~ **Date** as defined in section 7.65, the required minimum distribution in the year of death may not be transferred according to this section. The requirements of section 402(c)(11) of the Code apply to distributions under this section.

**7.8 *Mandatory Distributions.*** The Plan shall make a mandatory distribution of a Participant's Account which is valued at \$1,000 or less at the time of distribution. Participant or Beneficiary consent to a mandatory distribution shall not be required. A mandatory distribution shall be made no earlier than 30 days from the date the Plan provides notice of the right to elect payment in a direct rollover, pursuant to Code section 402(f), and no later than an administratively feasible date following the end of the Plan Year in which the Participant's employment with the Employer terminates. Mandatory distributions shall be paid in a single lump sum cash payment.



**Article VIII: Administration**

- 8.1 ***Plan Administrator.*** The Idaho State Board of Education, located at 650 W. State Street Boise, Idaho 83720, is the administrator of this Plan and has designated the following as responsible for enrolling Participants, sending Plan contributions for each Participant to the Fund Sponsor(s) selected by a Participant, and for performing other duties required for the operation of the Plan:

Chief Fiscal Officer  
Office of the Idaho State Board of Education

Vice President for Finance and Administration  
Boise State University

Vice President for Finance and Administration  
Idaho State University

Vice President for Finance and Administration  
University of Idaho

Vice President for Finance and Administration  
Lewis-Clark State College

Vice President for Finance and Administration  
Eastern Idaho Technical College

Financial Vice President  
College of Southern Idaho

Financial Vice President  
North Idaho College

Vice President for Finance and Administration  
College of Western Idaho

- 8.2 ***Authority of the Institution.*** The Institution has all the powers and authority expressly conferred upon it herein and further shall have discretionary and final authority to determine all questions concerning eligibility and contributions under the Plan, to interpret and construe all terms of the Plan, including any uncertain terms, and to determine any disputes arising under and all questions concerning administration of the Plan. Any determination made by the Institution shall be given deference, if it is subject to judicial review, and shall be overturned only if it is arbitrary or capricious. In exercising these powers and authority, the Institution will always exercise good faith, apply standards of uniform application, and refrain from arbitrary action. The Institution may employ attorneys, agents, and accountants, as it finds necessary or advisable to assist it in carrying out its



duties. The Institution, by action of the Board, may designate a person or persons other than the Institution to carry out any of its powers, authority, or responsibilities. Any delegation will be set forth in writing.

- 8.3 **Action of the Institution.** Any act authorized, permitted, or required to be taken by the Institution under the Plan, which has not been delegated in accordance section 8.2 "Authority of the Institution," may be taken by a majority of the members of the Board, by vote at a meeting. All notices, advice, directions, certifications, approvals, and instructions required or authorized to be given by the Institution under the Plan will be in writing and signed by either (i) a majority of the members of the Board, or by any member or members as may be designated by the Board, as having authority to execute the documents on its behalf, or ii) a person who becomes authorized to act for the Institution in accordance with the provisions of section 8.2 "Authority of the Institution." Any action taken by the Institution that is authorized, permitted, or required under the Plan and is in accordance with Funding Vehicles contractual obligations are final and binding upon the Institution, and all persons who have or who claim an interest under the Plan, and all third parties dealing with the Institution.
- 8.4 **Indemnification.** Subject to the limits of the Idaho Tort Claims Act, Idaho Code §6-901 et. seq., The Institution will satisfy any liability actually and reasonably incurred by any members of the Board or any person to whom any power, authority or responsibility of the Institution is delegated pursuant to section 8.2 "Authority of the Institution" (other than the Fund Sponsors) arising out of any action (or inaction) relating to this plan. These liabilities include expenses, attorney's fees, judgments, fines, and amounts paid in connection with any threatened, pending or completed action, suit or proceeding related to the exercise (or failure to exercise) of this authority. This is in addition to whatever rights of indemnification exist under the articles of incorporation, regulations or by-laws of the Institution, under any provision of law, or under any other agreement.
- 8.5 **No Reversion.** Under no circumstances or conditions will any Plan Contributions of the Institution revert to, be paid to, or inure to the benefit of, directly or indirectly, the Institution. However, if Plan Contributions are made by the Institution by mistake of fact, these amounts may be returned to the Institution within one year of the date that they were made, at the option of the Institution.
- 8.6 **Statements.** The Institution will determine the total amount of contributions to be made for each Participant from time to time on the basis of its records and in accordance with the provisions of this Article. When each contribution payment is made by the Institution, the Institution will prepare a statement showing the name of each Participant and the portion of the payment that is made for him or her, and will deliver the statement to the appropriate Fund Sponsors with the contributions payment. Any determination by the Institution, evidenced by a statement delivered to the Fund Sponsors, is final and binding on all Participants, their Beneficiaries or contingent annuitants, or any other person or persons



claiming an interest in or derived from the contribution's payment.

- 8.7 **Reporting.** Records for each Participant under this Plan are maintained on the basis of the Plan Year. At least once a year the Fund Sponsors will send each Participant a report summarizing the status of his or her Accumulation Account(s) as of December 31 each year. Similar reports or illustrations may be obtained by a Participant upon termination of employment or at any other time by writing directly to the Fund Sponsors.



**Article IX: Amendment and Termination**

- 9.1 ***Amendment and Termination.*** While it is expected that this Plan will continue indefinitely, the Institution reserves the right to amend, otherwise modify, or terminate the Plan, or to discontinue any further contributions or payments under the Plan, by resolution of its Board. In the event of a termination of the Plan or complete discontinuance of Plan Contributions, the Institution will notify all Participants of the termination. As of the date of complete or partial termination, all Accumulation Accounts will become nonforfeitable to the extent that benefits are accrued.
- 9.2 ***Limitation.*** Notwithstanding the provisions of the "Amendment and Termination" section of Article IX, the following conditions and limitations apply:
- (a) No amendment will be made which will operate to recapture for the Institution any contributions previously made under this Plan. However, Plan Contributions made based on a mistake of fact may be returned to the Institution within one year of the date on which the Plan Contribution was made. Also, Plan Contributions made in contemplation of approval by the Internal Revenue Service may be returned to the Institution if the Internal Revenue Service fails to approve the Plan.
  - (b) No amendment will deprive, take away, or alter any then accrued right of any Participant insofar as Plan Contributions are concerned.



**Article X: Miscellaneous**

- 10.1 ***Plan Non-Contractual.*** Nothing in this Plan will be construed as a commitment or agreement on the part of any person to continue his or her employment with the Institution, and nothing in this Plan will be construed as a commitment on the part of the Institution to continue the employment or the rate of compensation of any person for any period, and all employees of the Institution will remain subject to discharge to the same extent as if the Plan had never been put into effect.
- 10.2 ***Claims of Other Persons.*** The provisions of the Plan will not be construed as giving any Participant or any other person, firm, entity, or corporation, any legal or equitable right against the Institution, its officers, employees, or directors, except the rights as specifically provided for in this Plan or created in accordance with the terms and provisions of this Plan.
- 10.3 ***Merger, Consolidation, or Transfers of Plan Assets.*** In the event of a merger or consolidation with, or transfer of assets to, another plan, each Participant will receive immediately after such action a benefit under the plan that is equal to or greater than the benefit he or she would have received immediately before a merger, consolidation, or transfer of assets or liabilities.
- 10.4 ***Finality of Determination.*** All determinations with respect to the crediting of Years of Service under the Plan are made on the basis of the records of the Institution, and all determinations made are final and conclusive upon employees, former employees, and all other persons claiming a benefit interest under the Plan. Notwithstanding anything to the contrary contained in this Plan, there will be no duplication of Years of Service credited to an employee for any one period of his or her employment.
- 10.5 ***Non-Alienation of Retirement Rights or Benefits.*** No benefit under the Plan may, at any time, be subject in any manner to alienation, encumbrance, the claims of creditors or legal process to the fullest extent permitted by law. No person will have power in any manner to transfer, assign, alienate, or in any way encumber his or her benefits under the Plan, or any part thereof, and any attempt to do so will be void and of no effect. However, this Plan will comply with any judgment, decree or order which establishes the rights of another person to all or a portion of a Participant's benefit under this Plan to the extent that it is a "qualified domestic relations order" under section 414(p) of the Code.
- 10.6 ***Governing Law.*** Except as provided under federal law, the provisions of the Plan are governed by and construed in accordance with the laws of the State of Idaho.



**Article XI: Trust Provisions**

- 11.1 **Establishment of Trust.** The Institution shall establish a Trust, pursuant to applicable law, to hold the assets of the Trust Fund (as defined below). By signing below, the Trustees agree to hold the assets of the Trust Fund, as constituted from time to time, in trust, and to administer the Trust Fund in accordance with the terms and conditions of the Trust provisions in this Article XI. The Trustees shall, at the direction of the Institution as named fiduciary of the Plan, be the owner of the custodial account pursuant to which mutual funds shall be made available under the Plan as investment options. The Trustees shall follow the proper directions of the Institution, as named fiduciary of the Plan, with respect to the investment and withdrawal of assets in the mutual funds provided such directions are made in accordance with the terms of the Plan and are not contrary to ERISA. The shares of such mutual funds in the custodial account shall constitute the "Trust Fund." TIAA-CREF annuity contracts or certificates (and any other annuity contracts that satisfy the requirements of §401(f) of the Code) shall not be part of the Trust Fund. It shall be prohibited at any time for any part of the Trust Fund (other than such amounts as are required or permitted to be used to pay Plan expenses) to be used for, or diverted to, purposes other than the exclusive benefit of Plan Participants and Beneficiaries except as otherwise permitted under the Code and ERISA.
- 11.2 **Nontransferability or Alienation of Benefits.** No right or interest of a Plan Participant or Beneficiary shall be (a) assignable or transferable in any manner, (b) subject to any lien, or (c) liable for, or subject to any obligation or liability of any person except as otherwise permitted under the Code and ERISA. The preceding sentence shall not apply to an assignment, transfer, or attachment pursuant to a qualified domestic relations order (as defined in section 414(p) of the Code) or to a lien or levy on behalf of the Internal Revenue Service.
- 11.3 **Trustees' Authority and Powers over Trust Fund.** Subject to any limitations imposed by § 4975 of the Code and § 406 of ERISA related to prohibited transactions:
- (a) The Trustees shall have the exclusive authority and custody over all Plan assets deposited in the Trust, except to the extent otherwise provided herein.
  - (b) The Trustees shall have the authority and power to make, execute, acknowledge and deliver any instruments that may be necessary or appropriate to carry out their powers.
  - (c) The Trustees shall have the authority to vote by proxy on any mutual fund shares constituting the Trust Fund. In voting such proxies, the Trustees shall follow the instructions of Plan Participants and their Beneficiaries. If no instructions for voting proxies applicable to mutual fund shares are



received, the Trustees shall not exercise the voting rights for such shares and will not be responsible for the failure to vote or instruct the vote of such shares.

- (d) The Trustees shall have full authority and power to do all acts whether or not expressly authorized which may be deemed necessary or proper for the protection of the Trust Fund including the exercise of any conversion privilege and/or mutual fund subscription rights.
- (e) The Trustees shall have full authority and power to sell, dispose, purchase, exchange or transfer any Trust Fund shares pursuant to the instructions of the Institution, including a return of Plan contributions to the Institution that is permitted under ERISA and the Plan. No provision of this Trust shall be construed to prevent the transfer of funds at the direction of Participants or Beneficiaries among the Plan Allocation Accounts.
- (f) The Trustees shall apply for beneficial ownership of the custodial account pursuant to the instructions of the Institution as named fiduciary under the Plan.

**11.4 Standard of Care.** The Trustees shall discharge their duties with the care, skill, prudence and diligence under the circumstances then prevailing that a prudent man acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims. No Trustee shall cause the Trust to engage in any prohibited transaction under ERISA.

**11.5 Payment of Benefits.** The Trustees shall take such actions as may be necessary to distribute Plan assets held in the Trust to Participants or Beneficiaries in accordance the instructions of the Institution under the Plan. Except as provided in the following sentence, the Trust shall not retain any part of the Accumulation Account due a Participant or Beneficiary. If the Trustees receive any claim to assets held in the Trust which is adverse to a Participant's interest or the interest of his or her Beneficiary, and the Institution as named fiduciary under the Plan, in its absolute discretion, decides the claim is, or may be, meritorious, the Institution may direct the Trustees, and the Trustees shall agree, to withhold distribution until the claim is resolved or until instructed by a court of competent jurisdiction. As an alternative, the Institution may direct the Trustees and the Trustees shall agree, to deposit all or any portion of the Participant's or Beneficiaries' interest in the Trust into the court. Deposit with the court shall relieve the Trustees of any further obligation with respect to the assets deposited. The Trustees have the right to be reimbursed from the Institution for legal fees and costs incurred.

**11.6 Reliance on Trustees as Owner.** No one dealing with the Trustees shall be bound to see to the application of any money paid or property transferred to or upon the order of the Trustees, or to inquire into the validity or propriety of anything the Trustees may purport to do.



- 11.7 **Reliance on Institution.** The Trustees may consult with the Institution or counsel designated by the Institution with respect to the meaning or construction of any provision of the Plan, a funding instrument which is an asset of the Trust, the Trustees' obligations or duties under this Article XI or with respect to any action or proceeding arising hereunder. To the extent permitted by law, the Trustees shall be fully protected both with respect to any action taken or omitted in good faith pursuant to the advice of the Institution or its counsel and in reliance upon any statement of fact made by the Institution.
- 11.8 **Accounting of the Trustees.** Within a reasonable period of time after the end of each Plan Year, and/or upon termination of the Trust, the Trustees shall submit to the Institution sufficient information requested by the Institution which is necessary for the Institution to carry out its respective duties under ERISA with respect to the Plan.
- 11.9 **Trustees' Records.**
- (a) The Trustees shall keep accurate and detailed accounts of all investments (if any), Plan assets, receipts, disbursements, and other transactions involving the Trust Fund (if any), not otherwise prepared by the custodian/record-keeper of the custodial account. All accounts, books and records relating to such transactions shall be open to inspection at all reasonable times by any person designated by the Institution.
  - (b) The Trustees shall submit copies of any statements or written communications received pertaining to the investment of any Plan assets constituting the Trust Fund to the Institution contemporaneously with their receipt by the Trustees.
- 11.10 **Annual Valuation.** The Trustees shall cause a valuation of the Trust Fund to be made as of the last day of each Plan Year and shall provide the Institution with a written report of such valuation within a reasonable period of time after the valuation is performed. On each valuation date the earnings and losses shall be allocated to the Accumulation Account of each Participant with interest in such asset in the ratio that the Participant's interest bears to the fair market value of the asset and the Institution shall receive written notice of the value of each Participant's account held in such asset. Such report shall be prepared by the custodian/record-keeper of the custodial account.
- 11.11 **Compensation of Trustee.** The Trustees shall receive such reasonable compensation for services as agreed to in writing by the Trustees and the Institution, except that no compensation shall be paid to an employee of the Institution or its subsidiaries for service as a Trustee.
- 11.12 **Expenses.** All expenses incurred in connection with the administration of the Plan, including but not limited to Trustees' fees, fees of appraisers and accountants (if any), and legal fees shall be paid by the Institution. All expenses of the Trust Fund (if any), shall be paid by the Institution.



- 11.13 Removal or Resignation of Trustee.** Any person may be removed as Trustee by the Institution at any time by notice in writing to such Trustee. Any person acting as Trustee hereunder may resign at any time upon 30 days notice in writing to the Institution. A resigning or removed Trustee shall transfer and deliver to the Institution all records of the Trust in his or her possession and shall deliver to their successor Trustees (or the Institution if there are no successor Trustees) all instruments of transfer or assignment, whereupon such Trustee shall have no further duties hereunder; provided, however, that nothing herein shall prevent any Trustee at any time from filing a judicial settlement and accounting with a court of competent jurisdiction. The only parties to such action shall be the Trustees and the Institution. A successor Trustee shall have no duty to examine the accounts, records, investments, or acts of any previous Trustee.
- 11.14 Appointment of Successor and Additional Trustees.** The Institution may at any time and from time to time appoint successor Trustees and/or additional Trustees. The appointment of a successor and/or an additional Trustee shall become effective upon such Trustee's written acceptance of such appointment agreeing to be bound by the provisions of this Article XI. Upon acceptance of the appointment, each successor and/or additional Trustee shall have all the powers and duties of a Trustee. Except to the extent otherwise provided under ERISA, no successor or additional Trustee shall be personally liable for any act or omission which occurred prior to the time he or she became a Trustee.
- 11.15 Actions of Trustees.** Except as otherwise provided herein, when there are two Trustees, both must join in taking an action. When more than two Trustees are serving hereunder, all powers of the Trustees shall be by the act of a majority of such persons. Notwithstanding the foregoing, a Trustee may in a signed writing delegate his power to one or more of the other Trustees. No delegation of power may be irrevocable. Notwithstanding the delegation of a power, any Trustee who releases a power shall be liable as a result of the exercise or non-exercise of said power in the same manner as if the power had not been delegated.
- 11.16 Trustees Liability and Protection.** To the extent permitted by applicable law:
- (a) The Trustees shall not be responsible for the adequacy of the Trust Fund to meet and discharge any and all payments and liabilities under the Plan or Trust. The Trustees shall be fully protected in acting upon any instrument, certificate, or payment believed to be genuine and to be signed or presented by the proper person or persons, and the Trustees shall be under no duty to make any investigation or inquiry as to any statement contained in any such writing but may accept the same as conclusive evidence of the truth and accuracy of the statements therein contained. Except as otherwise provided in Section 405 of ERISA, each Trustee shall be liable only for his or her own acts of fraud, negligence or willful misconduct and for losses or diminution in value that results from his or her own acts of fraud, negligence or willful misconduct.
  - (b) The responsibilities of the Trustees shall be limited to those duties specifically imposed upon them under the terms of this Article XI, and the Trustees shall not



be personally liable for the acts or omissions of any other fiduciary of the Plan, except as provided in ERISA.

- (c) Except to the extent otherwise provided in this Article XI, the Trustees shall not be responsible for the investment of any property delivered to, or held in the Trust. The Trustees shall not be liable for any losses sustained by the Trust Fund by reason of the purchase, sale, retention, transfer or exchange of any investment in accordance with the provisions of the instrument or instructions of the Institution, Plan Participants and Beneficiaries under the terms of the Plan.
- (d) To the extent permitted by law, the Trustees shall be fully protected in relying upon the advice of legal counsel or the Institution with respect to their duties under the Trust.
- (e) In addition to whatever rights of indemnification the Trustees may be entitled to under the articles of incorporation, regulations or by-laws of the Institution, under any provision of law, or under any other agreement, the Institution will satisfy any liability actually and reasonably incurred by any Trustee, including expenses, attorney's fees, judgments, fines, and amounts paid in settlement or in connection with any threatened, pending, or completed action, suit, or proceeding which is related to the exercise or failure to exercise of any of the powers, authority, responsibilities, or discretion of the Trustee as provided in this Article XI or which is reasonably believed by the Trustee to be provided hereunder or any action taken by such Trustee in connection with such reasonable belief.

**11.17 Documentation.** Any action by the Institution pursuant to this Article XI may be evidenced by writing over the signature of a person designated by the Institution in writing and the Trustees shall be fully protected in acting in accordance with such writing. Any action of the Trustees may be evidenced by a writing signed by such Trustee, and any party shall be fully protected in acting in accordance with such writing. Except to the extent otherwise provided, any notice to be given under this Article XI will be considered effective when received.

**11.18 Amendment.** The Institution may amend any provisions of this Article XI by submitting a copy of the amendment to each Trustee provided that no such amendment which affects the rights, duties or responsibilities of any Trustee may be made without his or her written consent.

**11.19 Termination.** The Trust shall continue in full force and effect for such time as may be necessary to accomplish the purposes for which it is created. If the Plan is terminated by the Institution, the Trust shall remain in existence until such time as all assets held in the Trust Fund have been distributed in accordance with the terms of the Plan.

**11.20 No Bond.** No original, successor or additional Trustee shall be required to furnish any bond except to the extent required by ERISA and other applicable law.



11.21 **Governing Law.** This Trust shall be construed and enforced according to the laws of the State of domicile of the Institution, and all provisions hereof shall be administered according to the laws of such State except to the extent such laws are superseded by ERISA. The determination that any provision of this Trust is not enforceable in accordance with its terms in a particular jurisdiction shall not affect the validity or enforceability of the remaining provisions of this Trust generally or in any other jurisdiction or as to any other parties, but rather such unenforceable provisions shall be stricken or modified in accordance with such determination only as to such parties and this Trust, as so modified, shall continue to bind the specific parties involved therein and otherwise all other parties in unmodified form.

*Employer Identification Number: -*  
*Plan Number: 001*

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(Signature of Plan Administrator)



**Amendment 1****AMENDMENT OF THE Idaho State Board of Education Optional Retirement Plan for EGTRRA**

~~IN WITNESS WHEREOF, Idaho State Board of Education and Board of Regents of the University of Idaho herein amends the Idaho State Board of Education Optional Retirement Plan, as follows:~~

**A. ~~PREAMBLE~~**

~~1. Adoption and effective date of amendment. This amendment of the Plan is adopted to reflect certain provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001 ("EGTRRA"). This amendment is intended as good faith compliance with the requirements of EGTRRA and is to be construed in accordance with EGTRRA and guidance issued thereunder. Except as otherwise provided, this amendment shall be effective as of the first day of the first plan year beginning after December 31, 2001.~~

~~2. Supersession of inconsistent provisions. This amendment shall supersede the provisions of the Plan to the extent those provisions are inconsistent with the provisions of this amendment.~~

**B. ~~LIMITATIONS ON CONTRIBUTIONS~~**

~~Maximum Annual Addition. The annual addition that may be contributed or allocated to a Participant's account under the Plan for any limitation year shall not exceed the lesser of:~~

~~(a) \$40,000, as adjusted for increases in the cost-of-living under section 415(d) of the Code, or~~

~~(b) 100 percent of the Participant's compensation, within the meaning of section 415(c)(3) of the Code, for the limitation year.~~

~~The compensation limit referred to in (b) shall not apply to any contribution for medical benefits after separation from service (within the meaning of section 401(h) or section 419(f)(2) of the Code), if any, otherwise treated as an annual addition.~~

**C. ~~INCREASE IN COMPENSATION LIMIT~~**

~~1. Annual Compensation Limit. The annual compensation of each Participant taken into account in determining allocations for any plan year beginning after December 31, 2001, shall not exceed \$200,000, as adjusted for cost of living increases in accordance with section 401(a)(17)(B) of the Code. Annual compensation means compensation during the plan year or such other consecutive 12 month period over which compensation is otherwise determined under the plan (the determination period). The cost-of-living adjustment in effect for a calendar~~



~~year applies to annual compensation for the determination period that begins with or within such calendar year.~~

~~2. Plan Definition of Compensation. To the extent the Plan's definition of Compensation includes compensation not currently includable because of the application of Code Section 125 or 403(b), this definition is amended to include compensation not currently includable because of the application of Code §§ 132(f)(4) and 457.~~

~~3. Special Rule for Governmental Plans. Notwithstanding the above, employees of governmental employers who became Participants in the Plan before the first day of the plan year beginning after December 31, 1995, will be subject to the annual compensation limit in effect under the Plan before that date, as determined by IRS regulations.~~

#### ~~D. DIRECT ROLLOVERS OF PLAN DISTRIBUTIONS~~

~~1. Effective date. This section shall apply to distributions made after December 31, 2001.~~

~~2. Modification of definition of eligible retirement plan. For purposes of the direct rollover provisions in Article VII of the Plan, an eligible retirement plan shall mean a qualified retirement plan described in section 401(a) or section 403(a), of the Code, a tax sheltered annuity plan described in section 403(b) of the Code and an eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state and which agrees to separately account for amounts transferred into such plan from this Plan. The definition of eligible retirement plan shall also apply in the case of a distribution to a surviving spouse, or to a spouse or former spouse who is the alternate payee under a qualified domestic relation order, as defined in section 414(p) of the Code.~~

~~3. Modification of definition of eligible rollover distribution to exclude hardship distributions. For purposes of the direct rollover provisions in Article VII of the Plan, any amount that is distributed on account of hardship shall not be an eligible rollover distribution and the distributee may not elect to have any portion of such a distribution paid directly to an eligible retirement plan.~~

~~3. Modification of definition of eligible rollover distribution to include after tax employee contributions. For purposes of the direct rollover provisions in Article VII of the Plan, a portion of a distribution shall not fail to be an eligible rollover distribution merely because the portion consists of after tax employee contributions which are not includible in gross income. However, such portion may be transferred only to an individual retirement account or annuity described in section 408(a) or (b) of the Code, or to a qualified defined contribution plan described in section 401(a) or 403(a) of the Code that agrees to separately account for amounts so transferred, including separately accounting for the portion of such distribution which is includible in gross income and the portion of such distribution which is not so includible.~~

#### ~~E. ROLLOVERS FROM OTHER PLANS~~



1. ~~Direct Rollovers.~~ The Plan will accept a direct rollover of an eligible rollover distribution from:
  - a. ~~A qualified plan described in section 401(a) or 403(a) of the Code including after-tax employee contributions.~~
  - b. ~~A tax sheltered annuity plan described in section 403(b) of the Code, excluding after-tax employee contributions.~~
  - c. ~~An eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.~~
2. ~~Participant Rollover Contributions from Other Plans.~~ The Plan will accept a Participant contribution of an eligible rollover distribution from:
  - a. ~~A qualified plan described in section 401(a) or 403(a) of the Code.~~
  - b. ~~A tax sheltered annuity plan described in section 403(b) of the Code.~~
  - c. ~~An eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.~~
3. ~~Participant Rollover Contributions from IRAs.~~ The Plan will accept a Participant rollover contribution of the portion of a distribution from an individual retirement account or annuity described in section 408(a) or 408(b) of the Code that is eligible to be rolled over and would otherwise be includible in gross income.



**BUSINESS AFFAIRS AND HUMAN RESOURCES  
OCTOBER 18, 2012**

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**SUBJECT**

Idaho State Board of Education Policy II.H. – first reading

**REFERENCE**

December 2010	Board approved 2 <sup>nd</sup> reading of amendments to Board policy II.H. and changes to the model coaches contract incorporated therein.
October 2011	Board approved 1 <sup>st</sup> reading removing annual reporting requirement of performance relative to academic incentive.
December 2011	Board approved 2 <sup>nd</sup> reading removing annual reporting requirement of performance relative to academic incentive.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section II.H.

**BACKGROUND/DISCUSSION**

Idaho State Board of Education Policy II.H. provides that “The chief executive officer of an institution is authorized to enter into a contract for the services of a head coach or athletic director with that institution for a term of more than one (1) year, but not more than five (5) years, subject to approval by the Board ....”

At the October 2011 Board meeting, the chair of the Athletic Committee indicated the Committee wants the institutions to be aware the Board is looking for four criteria when looking at contracts: 1) timelines, 2) meaningful academic incentives, 3) three-year terms (with some exceptions) and 4) liquidated damages. The chair reiterated that future contracts need to contain these criteria to be considered and follow the model contract in Board policy. Staff subsequently decided to not revise the policy to require that contracts not exceed three (3) years because if there was later a need to approve a contract in excess of that amount the policy would have to be waived. Since that time, however, the Board has expressed its intent to limit coach contracts to three years.

**IMPACT**

This policy revision would limit multi-year coach contracts to not more than three years, absent extraordinary circumstances. All such employment contracts would require prior Board approval.

**ATTACHMENTS**

Attachment 1 – Policy II.H. – first reading

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends approval.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**BOARD ACTION**

I move to approve the first reading of proposed amendments to Board Policy Section II.H., Policies Regarding Coaching Personnel and Athletic Directors with all revisions as presented.

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



**GOVERNING POLICIES AND PROCEDURES**

SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES

Subsection: H. Policies Regarding Coaching Personnel and Athletic Directors December 2014<sup>2</sup>

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1. Agreements Longer Than One Year

The chief executive officer of an institution is authorized to enter into a contract for the services of a head coach or athletic director with that institution for a term of more than one (1) year, but not more than ~~five-three~~ (53) years, subject to approval by the Board as to the terms, conditions, and compensation there under, and subject further to the condition that the contract of employment carries terms and conditions of future obligations of the coach or athletic director to the institution for the performance of such contracts. A contract in excess of three (3) years or a rolling three (3) year contract may be considered by the Board upon the documented showing of extraordinary circumstances. All contracts must be submitted for Board approval prior to the contract effective date. Each contract for the services shall follow the general form approved by the Board as a model contract. Such contract shall define the entire employment relationship between the Board and the coach or athletic director and may incorporate by reference applicable Board and institutional policies and rules, and applicable law. The December 9, 2010 Board revised and approved multiyear model contract is adopted by reference into this policy. The model contract may be found on the Board's website at <http://boardofed.idaho.gov/>.

2. Agreements For One Year Or Less

The chief executive officer of an institution is authorized to enter into a contract for the services of a head coach or athletic director with that institution for a term of one (1) year or less without Board approval. Each contract shall follow the general form approved by the Board as a model contract. Such contract shall define the entire employment relationship between the Board and the coach or athletic director and may incorporate by reference applicable Board and institutional policies and rules, and applicable law. The December 9, 2010 Board revised and approved model contract is adopted by reference into this policy. The single-year model contract may be found on the Board's website at <http://boardofed.idaho.gov/>.

3. Academic Incentives

Each contract for a head coach shall include incentives, separate from any other incentives, based upon the academic performance of the student athletes whom the coach supervises. The chief executive officer of the institution shall determine such incentives.

4. Part-time Coaches Excepted

The chief executive officer of an institution is authorized to hire part-time head coaches as provided in the policies of the institution. Applicable Board policies shall be followed.



**GOVERNING POLICIES AND PROCEDURES**

**SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES**

**Subsection: H. Policies Regarding Coaching Personnel and Athletic Directors** December 2014<sup>2</sup>

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**5. Assistant Coaches**

The chief executive officer of the institution is authorized to hire assistant coaches as provided in the policies of the institution. Applicable Board policies shall be followed.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**SUBJECT**

Compensation Adjustments for Agency Heads of the State Board of Education

**REFERENCE**

May 2012  
June 2012

Board approved IPTV General Manager Salary  
Board approved SBOE Executive Director Salary

**APPLICABLE STATUTES, RULES OR POLICY**

Section 33-102A, Idaho Code  
Idaho State Board of Education Governing Policies & Procedures, Section I.E.

**BACKGROUND / DISCUSSION**

At the Board's May Retreat, it approved an equity salary increase for Peter Morrill as General Manager of Idaho Public Television for FY 2013, at \$50.50/hr or \$105,040 annually effective June 24, 2012, which reflected a 13.46% base salary increase.

At the Board's June meeting the Board approved a salary increase for Dr. Mike Rush as Executive Director of the Idaho State Board of Education at \$58.76/hr or \$122,220.80 annually, which reflected an 8.9% base salary increase.

After the Board took these respective actions, the Governor's Office and the Division of Financial Management contacted the Board President and Executive Director and expressed a desire for relative consistency in all State agency head salary increases. Negotiations commenced and the parties reached an agreement on Mr. Morrill and Dr. Rush at a 5% and 8% increase, respectively. It has been determined it is now necessary and appropriate for the Board to approve these respective salaries as modified by the Governor's Office.

Salary increases for Mr. Morrill and Dr. Rush, as agreed to with the Governor's Office, have already been budgeted and implemented.

**IMPACT**

Board policy I.E. states the Board sets the salaries for chief executive officers. Approval will bring negotiated salaries into alignment with policy.

**STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends approval.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**BOARD ACTION**

I move to amend the salary for Mike Rush as Executive Director of the Idaho State Board of Education, and to set an hourly rate of \$58.27/hr or \$121,201.60 annually, effective June 24, 2012.

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

I move to amend the salary for Peter Morrill as General Manager of Idaho Public Television, and to set at an hourly rate of \$46.74/hr or \$97,219.20 annually, effective June 10, 2012.

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



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Vice President for University Advancement – Multi-Year Contract

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section II. B.3.a. and II.F.

**BACKGROUND/DISCUSSION**

Boise State University requests Board approval to offer a multi-year contract to Laura Simic as Vice President for University Advancement. The proposed term is two years and eight months, November 1, 2012 - June 30, 2015.

The Vice President for University Advancement works to build relationships and support for the university's mission of academic excellence. In partnership with the Alumni Association, Bronco Athletic Association and the Boise State University Foundation, University Advancement seeks to develop and nurture donor-centered relationships and help ensure the stewardship of gifts made in support of the University.

Laura is a career professional in the field of advancement with an impressive record of experience, accomplishments, and service for both private and public institutions. Most recently, she served four years at Creighton University in Omaha, Nebraska, as the interim vice president for university relations and senior associate vice president of development and campaign director. She led the final years of Creighton's fundraising campaign which exceeded its fundraising goal by 34 percent with a total of \$471 million. She reshaped the advancement program to create an integrated approach among its operations and support services.

Laura also worked as the associate vice chancellor for development at University of North Carolina Charlotte from 2000-2008 where she provided strategic leadership in the university's private fundraising efforts that resulted in a 332% increase in gift income over a five-year period. Prior to this, she spent 10 years at the University of Tennessee where her role evolved from the director of development for the university libraries to the assistant vice president for planned giving. Her advancement career began at the University of Oregon as a development officer.

Laura earned her Bachelor of Arts degree from the University of Oregon in journalism and public relations and her Master of Science degree from the University of Tennessee in education/leadership studies. She became a Certified Fund Raising Executive in 1996 and has been recertified five times.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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Notwithstanding the multi-year term, the employment contract establishes appropriate procedures regarding dismissal for cause.

**IMPACT**

The salary is \$220,000 annually, and salary increases as may be determined appropriate by the President as consistent with the raises granted to other employees of the University.

**ATTACHMENTS**

Attachment 1 – Proposed Contract

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

Board policy II.F. provides policies regarding non-classified employees. The policy requires employment contracts with non-classified employees to contain certain standard terms and conditions. Staff has verified that the proposed contract contains the requisite terms and conditions.

The Policy also provides that “salaries for new appointments to ... vice president ... may not exceed the median rate for such position established by the College and University Professional Association for Human Resources (CUPA-HR), or its equivalent, without prior Board approval.” BSU matched this job to the CUPA benchmark for a “Chief Development Officer” and used an average of the median salaries of the Doctorate and Master’s Institutions survey data to arrive at an average median rate of \$197,500. The 2010 edition of the Carnegie Classifications lists BSU under “Master’s/L: Master’s Colleges and Universities (larger programs).” The median salary for this position among Master’s institutions is \$160,000. The requested salary for this position would 138% of the Master’s median (or 111% of the “average median” rate used by BSU). The salary of the previous incumbent, who left 6/26/2011, was \$192,816. Since then, there has been an individual in an acting appointment who makes \$186,868.

**BOARD ACTION**

I move to approve the request by Boise State University to enter into a multi-year contract with Laura Simic as Vice President for University Advancement of the University, for a term commencing on November 1, 2012 with an annual salary of \$220,000, in substantial conformance to the form submitted to the Board, and to authorize the President of Boise State University to execute the contract.

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



## EMPLOYMENT AGREEMENT

This Employment Agreement ("Agreement") is entered into by and between Boise State University ("University") and Laura Simic ("Employee").

### ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University shall employ Employee as "Vice President for University Advancement" (the "Position"). Employee represents and warrants that Employee is fully qualified to serve, and is available for employment, in this capacity.

1.2. Reporting Relationship. Employee shall report and be responsible to the University President.

1.3. Duties. Employee shall perform such duties in the University as the President may assign and as may be described elsewhere in this Agreement. The University shall have the right, at any time, to reassign Employee to duties at the University other than as set forth herein, provided that Employee's compensation and benefits shall not be affected by any such reassignment.

### ARTICLE 2

2.1. Term. This Agreement is for a fixed-term appointment of two (2) years and eight (8) months, commencing on November 1, 2012 and terminating, without further notice to Employee, on June 30, 2015 (the "Term") unless sooner terminated in accordance with other provisions of this Agreement.

2.2. Extension or Renewal. This Agreement is renewable solely upon an offer from the University and an acceptance by Employee, both of which must be in writing and signed by the parties. Any renewal is subject to the prior approval of University's Board of Trustees.

### ARTICLE 3

#### 3.1. Regular Compensation.

3.1.1. In consideration of Employee's services and satisfactory performance of this Agreement, the University shall provide to Employee:

- (a) An annual salary of \$220,000 per year, payable in biweekly installments in accordance with normal University procedures, and such salary increases as may be determined appropriate by the President as consistent with the raises granted to other employees of the University annually;



- (b) The opportunity to receive such employee benefits calculated on the above salary as the University provides generally to non-faculty exempt employees.

3.2. General Conditions of University Based Compensation. All compensation provided by the University to Employee is subject to deductions and withholdings as required by law or the terms and conditions of any fringe benefit in which Employee participates.

#### ARTICLE 4

4.1. Outside Activities. Employee shall not undertake any business, professional or personal activities, or pursuits that would prevent Employee from fulfilling Employee's performance duties under this Agreement, or that, in the opinion of the University, would reflect adversely upon the University. Employee may not use the University's name, logos, or trademarks in connection with any such arrangements without the prior written approval of the President.

#### ARTICLE 5

5.1. Termination of Employee for Cause. The University may, in its discretion, suspend Employee from some or all of Employee's duties, temporarily or permanently, and with or without pay; reassign Employee to other duties; or terminate this Agreement at any time for good or adequate cause, as those terms are defined in applicable State Board of Education and University policies.

5.1.1. In the event of any termination for good or adequate cause, the University's obligation to provide compensation and benefits to Employee, whether direct, indirect, supplemental or collateral, shall cease as of the date of such termination, and the University shall not be liable for the loss of any collateral business opportunities or other benefits, perquisites, or income resulting from outside activities or from any other sources.

5.2. Termination of Employee for Convenience of University.

5.2.1. At any time after commencement of this Agreement, University, for its own convenience, may terminate this Agreement by giving ten (10) days prior written notice to Employee.

5.2.2. In the event the University terminates this Agreement for convenience, Employee's salary will continue as set forth in Section 3.1.1 until the end of the Term.

5.3. Termination Due to Disability or Death of Employee.

5.3.1. Notwithstanding any other provision of this Agreement, this Agreement shall terminate automatically if Employee becomes totally or permanently disabled as defined by the University's disability insurance carrier, becomes unable to perform the essential functions of Position, or dies.



5.3.2. If this Agreement is terminated because of Employee's death, Employee's salary and all other benefits shall terminate as of the last day worked, except that the Employee's personal representative or other designated beneficiary shall be paid all compensation due or unpaid and death benefits, if any, as may be contained in any fringe benefit plan now in force or hereafter adopted by the University and due to the Employee's estate or beneficiaries thereunder.

5.3.3. If this Agreement is terminated because the Employee becomes totally or permanently disabled as defined by the University's disability insurance carrier, or becomes unable to perform the essential functions of the Position, all salary and other benefits shall terminate, except that the Employee shall be entitled to receive any compensation due or unpaid and any disability-related benefits to which he is entitled by virtue of employment with the University.

5.4. No Liability. The University shall not be liable to Employee for the loss of any collateral business opportunities or any other benefits, perquisites or income from any sources that may ensue as a result of any termination of this Agreement by either party or due to death or disability or the suspension or reassignment of Employee, regardless of the circumstances.

## ARTICLE 6

6.1. Board Approval. This Agreement shall not be effective until and unless approved by the University's Board of Trustees and executed by both parties as set forth below. In addition, the payment of any compensation pursuant to this agreement shall be subject to the approval of the University's Board of Trustees and the President; the sufficiency of legislative appropriations; the receipt of sufficient funds in the account from which such compensation is paid; and the Board of Trustees and University's rules or policies regarding financial exigency, furlough and work hour adjustments.

6.2. Governing Policies and Procedures. The terms of employment set forth in this Agreement are subject to the governing policies and procedures of the State Board of Education and the policies and procedures of Boise State University, and as such, may be amended from time to time and without notice during the Term of this Agreement.

6.3. Assignment. Neither party may assign its rights or delegate its obligations under this Agreement without the prior written consent of the other party.

6.4. Waiver. No waiver of any default in the performance of this Agreement shall be effective unless in writing and signed by the waiving party. The waiver of a particular breach in the performance of this Agreement shall not constitute a waiver of any other or subsequent breach. The resort to a particular remedy upon a breach shall not constitute a waiver of any other available remedies.

6.5. Severability. If any provision of this Agreement is determined to be invalid or unenforceable, the remainder of the Agreement shall not be affected and shall remain in effect.



6.6. Governing Law. This Agreement shall be subject to and construed in accordance with the laws of the state of Idaho as an agreement to be performed in Idaho. Any action based in whole or in part on this Agreement shall be brought in the courts of the state of Idaho.

6.7. Oral Promises. Oral promises of an increase in annual salary or of any supplemental or other compensation shall not be binding upon the University.

6.8. Force Majeure. Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes therefore, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the reasonable control of the party obligated to perform (including financial inability), shall excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

6.9. Non-Confidentiality. The Employee hereby consents and agrees that this document may be released and made available to the public after it is signed by the Employee. The Employee further agrees that all documents and reports he is required to produce under this Agreement may be released and made available to the public at the University's sole discretion.

6.10. Notices. Any notice under this Agreement shall be in writing and be delivered in person or by public or private courier service (including U.S. Postal Service Express Mail) or certified mail with return receipt requested or by facsimile. All notices shall be addressed to the parties at the following addresses or at such other addresses as the parties may from time to time direct in writing:

the University:                      Boise State University  
    Office of the President  
    1910 University Drive  
    Boise, Idaho 83725-1000

the Employee:                      Laura Simic  
    [Employee's last known address on file with  
    Human Resource Services]

Any notice shall be deemed to have been given on the earlier of: (a) actual delivery or refusal to accept delivery, (b) the date of mailing by certified mail, or (c) the day facsimile delivery is verified. Actual notice, however and from whomever received, shall always be effective.

6.11. Headings. The headings contained in this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation hereof

6.12. Binding Effect. This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties and their respective heirs, legal representatives, successors and assigns.

6.13. Non-Use of Names and Trademarks. The Employee shall not, without the University's prior written consent in each case, use any name, trade name, trademark, or other



designation of the University (including contraction, abbreviation or simulation), except in the course and scope of his official University duties.

6.14. No Third Party Beneficiaries. There are no intended or unintended third party beneficiaries to this Agreement.

6.15. Entire Agreement; Amendments. This Agreement constitutes the entire agreement of the parties and supersedes all prior agreements and understandings with respect to the same subject matter. No amendment or modification of this Agreement shall be effective unless in writing, signed by both parties, and approved by University's Board of Trustees.

UNIVERSITY

EMPLOYEE

\_\_\_\_\_  
Robert W. Kustra, President

\_\_\_\_\_  
Laura Simic

Approved by the Board on the \_\_\_\_ day of \_\_\_\_\_, 2012.



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**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**UNIVERSITY OF IDAHO**

**SUBJECT**

Employment contract extension for Director of Track and Field and Cross Country, Wayne Phipps

**REFERENCE**

October 17, 2005	Board approval of original multi-year agreement
August 9-10, 2007	Board approval of coaching contract extension

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures Section II.H.1.

**BACKGROUND/DISCUSSION**

The University of Idaho (UI) wishes to extend the contract to its Director of Track and Field and Cross Country, Wayne Phipps for a period of five years ending August 12, 2017. The primary terms of the agreement are set forth below, and the entire contract and matrix comparison to the Board model contract are attached.

The University seeks a 5 year contract based on the following factors:

- 17 seasons coaching track & field/cross country at the University of Idaho
- Last three seasons as Director of Track & Field/Cross Country
- Nine times named conference coach of the year
- Athletes regularly honored by U.S. Track & Field and Cross Country Coaches Association Division I All-Academic Teams in both men's and women's cross country and track and field.
- Five Idaho athletes named as WAC top male or female athlete since 2005.
- Other factors, as well as additional detail for the factors set out above can be found in the attached biography.

**IMPACT**

The annual base salary from appropriated funds is \$63,252.80, with eligibility to receive University-wide changes in employee compensation approved by the Director of Athletics and the President.

There is an annual media payment of \$8,000 and the following incentive/supplemental compensation provisions:

- Conference champions or co-champion = \$1,000 per team for each conference championship or co-championship team (total of 6 possible<sup>1</sup>)

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<sup>1</sup> Four teams for track and field (indoor and outdoor for both men and women) and 2 teams for cross country (men and women).



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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- Top 20 national ranking at season end = \$1,000 per team for each conference championship or co-championship team (total of 6 possible)
- Conference Coach of the Year = \$1,000 per team (total of 6 possible)
- Individual National Champion in intercollegiate track and field and cross country \$500 per champion (estimate one per team per year) = \$3,000
- Academic achievement and behavior of team (categorized using APR) =:
  - National score within sport
  - 975 – 979 = \$250 per team
  - 980 – 985 = \$300 per team
  - 986 – 990 = \$400 per team
  - 990 and above = \$450 per team (total 6 possible)

Total potential annual compensation (base salary, media payment and incentive is \$88,952.80 (using an estimated maximum individual national champions of one per team in any given year).

Liquidated damages for the Coach terminating the contract early for his own convenience are \$15,000 for approximately the first 22 months, then \$10,000 for the next 12 months, \$5,000 for the 12 months thereafter, and \$5,000 for the final 12 months.

**ATTACHMENTS**

Attachment 1 – Employment Contract	Page 5
Attachment 2 – Comparison to Board Model Contract	Page 19
Attachment 3 – Coach Phipps' biography	Page 35

**STAFF COMMENTS AND RECOMMENDATIONS**

At the October 2011 Board meeting, the chair of the Athletic Committee indicated the Committee wants the institutions to be aware the Board is looking for four criteria when looking at contracts: 1) timelines, 2) meaningful academic incentives, 3) three-year terms (with some exceptions) and 4) liquidated damages. The chair reiterated that future contracts need to contain these criteria to be considered and follow the model contract in Board policy.

UI brings a contract for its Director of Track and Field and Cross Country. The term of this five year employment agreement was effective August 13, 2012. The Board may wish to inquire about timelines and contract length. The academic incentives are adequate – with the highest amount almost equivalent to incentive pay for individual national champions. The contract also contains adequate liquidated damages in favor of the University.

The employment agreement follows the Board-approved model contract.

Staff recommends the institution provide justification to the Board for seeking retroactive approval of a five year contract.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**BOARD ACTION**

I move to approve the request by the University of Idaho to extend the University's employment contract with Wayne Phipps, as Director of Track and Field and Cross Country, for a term commencing retroactively on August 13, 2012 and expiring on August 12, 2017 with an annual base salary of \$63,252.80 and such contingent base salary increases, annual media payments, and incentive/supplemental compensation provisions as set forth in the materials presented to the Board, in substantial conformance with the terms of contract set forth in Attachment 1 to the Board materials.

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



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## EMPLOYMENT AGREEMENT

This Employment Agreement (Agreement) is entered into by and between the University of Idaho (University), and Wayne Phipps (Coach).

### ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University shall employ Coach as the Director of its intercollegiate track and field and cross country teams (Teams). Coach represents and warrants that Coach is fully qualified to serve, and is available for employment, in this capacity.

1.2. Reporting Relationship. Coach shall report and be responsible directly to the University's Director of Athletics (Director) or the Director's designee. Coach shall abide by the reasonable instructions of Director or the Director's designee and shall confer with the Director or the Director's designee on all administrative and technical matters. Coach shall also be under the general supervision of the University's President (President).

1.3. Duties. Coach shall manage and supervise the Teams and shall perform such other duties in the University's athletic program as the Director may assign and as may be described elsewhere in this Agreement. The University shall have the right, at any time, to reassign Coach to duties at the University other than as head coach of the Teams, provided that Coach's compensation and benefits shall not be affected by any such reassignment, except that the opportunity to earn supplemental compensation as provided in sections 3.2.1 through 3.2.7 shall cease.

### ARTICLE 2

2.1. Term. This Agreement is for a fixed-term appointment of five (5) years, commencing on August 13, 2012, and terminating, without further notice to Coach, on August 12, 2017, unless sooner terminated in accordance with other provisions of this Agreement.

2.2. Extension or Renewal. This Agreement is renewable solely upon an offer from the University and an acceptance by Coach, both of which must be in writing and signed by the parties. Any renewal is subject to the prior approval of University's Board of Regents. This Agreement in no way grants to Coach a claim to tenure in employment, nor shall Coach's service pursuant to this agreement count in any way toward tenure at the University.

### ARTICLE 3

3.1 Regular Compensation.



3.1.1 In consideration of Coach's services and satisfactory performance of this Agreement, the University shall provide to Coach:

- a) An annual salary of \$63,252.80 per year, payable in biweekly installments in accordance with normal University procedures. Coach will be eligible to receive University-wide changes in employee compensation approved by the Director and President;
- b) The opportunity to receive such employee benefits as the University provides generally to non-faculty exempt employees; and
- c) The opportunity to receive such employee benefits as the University's Department of Athletics (Department) provides generally to its employees of a comparable level. Coach hereby agrees to abide by the terms and conditions, as now existing or hereafter amended, of such employee benefits.

**3.2 Supplemental Compensation**

3.2.1. Each year one of the Teams is the conference champion or co-champion and if Coach continues to be employed as University's co-head coach of its intercollegiate track and field and cross country teams as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$1,000 during the fiscal year in which the championship is achieved. If more than one Team is the conference champion or co-champion, the amount of supplemental compensation will be \$1,000 for each conference champion or co-champion. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.2. Each year one of the teams finishes in the top 20 in the NCAA championships and if Coach continues to be employed as University's co-head coach of its intercollegiate track and field and cross country teams as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$1,000. If more than one Team places in the Top 20 at the NCAA championships, the Coach will earn supplemental compensation of \$1,000 for each Top 20 finish. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.3. For each individual National Champion in intercollegiate track and field and cross country and if Coach continues to be employed as University's head of its intercollegiate track and field and cross country teams as of the ensuing July 1<sup>st</sup>, the University shall pay to Coach supplemental compensation of \$500 for each individual champion.



3.2.4 Each year Coach shall be eligible to receive supplemental compensation based on the academic achievement and behavior of Team members if the single year team Academic Progress Rate (“APR”) for the Team meets the following levels in the National Ranking as follows:

National score within sport

975 – 979 = \$250 per team

980 – 985 = \$300 per team

986 – 990 = \$400 per team

990 and above = \$450 per team

Any such supplemental compensation paid to Coach shall be accompanied with a justification for the supplemental compensation based on the factors listed above, and such justification shall be separately reported to the Board of Regents as a document available to the public under the Idaho Public Records Act.

3.2.5 Each year Coach is named Conference Coach of the Year or Conference Co-Coach of the year, and if Coach continues to be employed as University’s head of its track and field and cross country teams as of the ensuing July 1st, Coach shall receive supplemental compensation of \$1,000. If the Coach is named Conference Coach of the Year or Conference Co-Coach of the year for both the men’s and women’s track and field and cross country teams, Coach will receive \$1,000 for each award. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.6 The Coach shall receive the sum of \$8,000 from the University or the University’s designated media outlet(s) or a combination thereof each year during the term of this Agreement in compensation for participation in media programs and public appearances (Programs). Each year, one-half of this sum shall be paid prior to the first indoor track meet, and one-half shall be paid no later than two weeks after the last outdoor track and field meet. Coach’s right to receive the second half of such payment shall vest on the date of the Team’s last regular season or post-season competition, whichever occurs later, provided Coach has fully participated in media programs and public appearances through that date. Coach’s right to receive any such media payment under this Paragraph is expressly contingent upon the following: (1) academic achievement and behavior of Team members; (2) appropriate behavior by, and supervision of, all assistant coaches, as determined by the Director; and (3) Coach’s compliance with University’s financial stewardship policies as set forth in University’s Administrative Procedures Manual Chapter 25. Agreements requiring the Coach to participate in Programs related to his duties as an employee of University are the property of the University. The University shall have the exclusive right to negotiate and contract with all producers of media productions and all parties desiring public appearances by the Coach. Coach agrees to cooperate with the University in order for the Programs to be



successful and agrees to provide his services to and perform on the Programs and to cooperate in their production, broadcasting, and telecasting. It is understood that neither Coach nor any assistant coaches shall appear without the prior written approval of the Director on any competing radio or television program (including but not limited to a coach's show, call-in show, or interview show) or a regularly scheduled news segment, except that this prohibition shall not apply to routine news media interviews for which no compensation is received. Without the prior written approval of the Director, Coach shall not appear in any commercial endorsements that are broadcast on radio or television that conflict with those broadcast on the University's designated media outlets.

3.2.7 Coach agrees that the University has the exclusive right to operate track and field and cross country camps on its campus using University facilities. The University shall allow Coach the opportunity to earn supplemental compensation by assisting with the University's camps in Coach's capacity as a University employee. Coach hereby agrees to assist in the marketing, supervision, and general administration of the University's track and field camps. Coach also agrees that Coach will perform all obligations mutually agreed upon by the parties.

3.2.8 Coach agrees that the University has the exclusive right to select footwear, apparel and/or equipment for the use of its student-athletes and staff, including Coach, during official practices and games and during times when Coach or the Team is being filmed by motion picture or video camera or posing for photographs in their capacity as representatives of University. Coach recognizes that the University negotiating or has entered into an agreement with Nike to supply the University with athletic footwear, apparel and/or equipment. Coach agrees that, upon the University's reasonable request, Coach will consult with appropriate parties concerning Nike product's design or performance, shall act as an instructor at a clinic sponsored in whole or in part by Nike, or give a lecture at an event sponsored in whole or in part by Nike, or make other educationally-related appearances as may be reasonably requested by the University. Notwithstanding the foregoing sentence, Coach shall retain the right to decline such appearances as Coach reasonably determines to conflict with or hinder his duties and obligations as co-head track and field and cross country coach. In order to avoid entering into an agreement with a competitor of Nike, Coach shall submit all outside consulting agreements to the University for review and approval prior to execution. Coach shall also report such outside income to the University in accordance with NCAA rules. Coach further agrees that Coach will not endorse any athletic footwear, apparel and/or equipment products, including Nike, and will not participate in any messages or promotional appearances which contain a comparative or qualitative description of athletic footwear, apparel or equipment products.

3.3 General Conditions of Compensation. All compensation provided by the University to Coach is subject to deductions and withholdings as required by law or the terms and conditions of any fringe benefit in which Coach participates. However, if any fringe benefit is based in whole or in part upon the compensation provided by the University to Coach, such fringe benefit shall be based only on the compensation



provided pursuant to section 3.1.1, except to the extent required by the terms and conditions of a specific fringe benefit program.

**ARTICLE 4**

4.1. Coach's Specific Duties and Responsibilities. In consideration of the compensation specified in this Agreement, Coach, in addition to the obligations set forth elsewhere in this Agreement, shall:

4.1.1. Devote Coach's full time and best efforts to the performance of Coach's duties under this Agreement;

4.1.2. Develop and implement programs and procedures with respect to the evaluation, recruitment, training, and coaching of Team members which enable them to compete successfully and reasonably protect their health, safety, and well-being;

4.1.3. Observe and uphold all academic standards, requirements, and policies of the University and encourage Team members to perform to their highest academic potential and to graduate in a timely manner; and

4.1.4. Know, recognize, and comply with all applicable laws and the policies, rules and regulations of the University, the University's governing board, the conference, and the NCAA; supervise and take appropriate steps to ensure that Coach's assistant coaches, any other employees for whom Coach is administratively responsible, and the members of the Team know, recognize, and comply with all such laws, policies, rules and regulations; and immediately report to the Director and to the Department's Director of Compliance if Coach has reasonable cause to believe that any person or entity, including without limitation representatives of the University's athletic interests, has violated or is likely to violate any such laws, policies, rules or regulations. Coach shall cooperate fully with the University and Department at all times. The names or titles of employees whom Coach supervises are attached as Exhibit C. The applicable laws, policies, rules, and regulations include: (a) State Board of Education and Board of Regents of the University of Idaho Governing Policies and Procedures and Rule Manual; (b) University's Handbook; (c) University's Administrative Procedures Manual; (d) the policies of the Department; (e) NCAA rules and regulations; and (f) the rules and regulations of the track and field conference of which the University is a member.

4.2 Outside Activities. Coach shall not undertake any business, professional or personal activities, or pursuits that would prevent Coach from devoting Coach's full time and best efforts to the performance of Coach's duties under this Agreement, that would otherwise detract from those duties in any manner, or that, in the opinion of the University, would reflect adversely upon the University or its athletic program. Subject to the terms and conditions of this Agreement, Coach may, with the prior written approval of the Director, who may consult with the President, enter into separate arrangements for outside activities and endorsements which are consistent with Coach's obligations under this Agreement. Coach may not use the University's name, logos, or trademarks in



connection with any such arrangements without the prior written approval of the Director and the President.

4.3 NCAA Rules. In accordance with NCAA rules, Coach shall obtain prior written approval from the University's President for all athletically related income and benefits from sources outside the University and shall report the source and amount of all such income and benefits to the University's President whenever reasonably requested, but in no event less than annually before the close of business on June 30th of each year or the last regular University work day preceding June 30th. The report shall be in a format reasonably satisfactory to University. Sources of such income include, but are not limited to, the following:

- (a) Income from annuities;
- (b) Sports camps;
- (c) Housing benefits, including preferential housing arrangements;
- (d) Country club memberships;
- (e) Complimentary ticket sales;
- (f) Television and radio programs; and
- (g) Endorsement or consultation contracts with athletics shoe, apparel or equipment manufacturers.

In no event shall Coach accept or receive directly or indirectly any monies, benefits, or gratuities whatsoever from any person, association, corporation, University booster club, University alumni association, University foundation, or other benefactor, if the acceptance or receipt of the monies, benefits, or gratuities would violate applicable law or the policies, rules, and regulations of the University, the University's governing board, the conference, or the NCAA.

4.4 Hiring Authority. Coach shall have the responsibility and the sole authority to recommend to the Director the hiring and termination of assistant coaches for the Team, but the decision to hire or terminate an assistant coach shall be made by the Director and shall, when necessary or appropriate, be subject to the approval of President and the University's Board of Regents.

4.5 Scheduling. Coach shall consult with, and may make recommendations to, the Director or the Director's designee with respect to the scheduling of Team competitions, but the final decision shall be made by the Director or the Director's designee.

4.6 Other Coaching Opportunities. Coach shall not, under any circumstances, interview for, negotiate for, or accept employment as a coach at any other institution of higher education or with any professional sports team, requiring performance of duties prior to the expiration of this Agreement, without the prior approval of the Director. Such approval shall not unreasonably be withheld.

## ARTICLE 5

5.1 Termination of Coach for Cause. The University may, in its discretion,



suspend Coach from some or all of Coach's duties, temporarily or permanently, and with or without pay; reassign Coach to other duties; or terminate this Agreement at any time for good or adequate cause, as those terms are defined in applicable rules and regulations.

5.1.1 In addition to the definitions contained in applicable rules and regulations, University and Coach hereby specifically agree that the following shall constitute good or adequate cause for suspension, reassignment, or termination of this Agreement:

- a) A deliberate or major violation of Coach's duties under this agreement or the refusal or unwillingness of Coach to perform such duties in good faith and to the best of Coach's abilities;
- b) The failure of Coach to remedy any violation of any of the terms of this agreement within 30 days after written notice from the University;
- c) A deliberate or major violation by Coach of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference or the NCAA, including but not limited to any such violation which may have occurred during the employment of Coach at another NCAA or NAIA member institution;
- d) Ten (10) working days' absence of Coach from duty without the University's consent;
- e) Any conduct of Coach that constitutes moral turpitude or that would, in the University's judgment, reflect adversely on the University or its athletic programs;
- f) The failure of Coach to represent the University and its athletic programs positively in public and private forums;
- g) The failure of Coach to fully and promptly cooperate with the NCAA or the University in any investigation of possible violations of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference, or the NCAA;
- h) The failure of Coach to report a known violation of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference, or the NCAA, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team;  
or



- i) A violation of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference, or the NCAA, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team if Coach knew or should have known of the violation and could have prevented it by ordinary supervision.

5.1.2 Suspension, reassignment, or termination for good or adequate cause shall be effectuated by the University as follows: before the effective date of the suspension, reassignment, or termination, the Director or his or her designee shall provide Coach with notice, which notice shall be accomplished in the manner provided for in this Agreement and shall include the reason(s) for the contemplated action. Coach shall then have an opportunity to respond. After Coach responds or fails to respond, University shall notify Coach whether, and if so when, the action will be effective.

5.1.3 In the event of any termination for good or adequate cause, the University's obligation to provide compensation and benefits to Coach, whether direct, indirect, supplemental or collateral, shall cease as of the date of such termination, and the University shall not be liable for the loss of any collateral business opportunities or other benefits, perquisites, or income resulting from outside activities or from any other sources.

5.1.4 If found in violation of NCAA regulations, Coach shall, in addition to the provisions of Section 5.1, be subject to disciplinary or corrective action as set forth in the provisions of the NCAA enforcement procedures. This section applies to violations occurring at the University or at previous institutions at which the Coach was employed.

## **5.2 Termination of Coach for Convenience of University.**

5.2.1 At any time after commencement of this Agreement, University, for its own convenience, may terminate this Agreement by giving ten (10) days prior written notice to Coach.

5.2.2 In the event that University terminates this Agreement for its own convenience, University shall be obligated to pay Coach, as liquidated damages and not a penalty, the salary set forth in section 3.1.1(a), excluding all deductions required by law, on the regular paydays of University until the term of this Agreement ends; provided, however, in the event Coach obtains other employment of any kind or nature after such termination, then the amount of compensation the University pays will be adjusted and reduced by the amount of compensation paid Coach as a result of such other employment, such adjusted compensation to be calculated for each University pay-period by reducing the gross salary set forth in section 3.1.1(a) (before deductions required by law) by the gross compensation paid to Coach under the other employment, then subtracting from this adjusted gross compensation deduction according to law.. In addition, Coach will be entitled to continue his health insurance plan and group life



insurance as if he remained a University employee until the term of this Agreement ends or until Coach obtains reasonably comparable employment, whichever occurs first. Coach shall be entitled to no other compensation or fringe benefits, except as otherwise provided herein or required by law. Coach specifically agrees to inform University within ten business days of obtaining other employment, and to advise University of all relevant terms of such employment, including without limitation the nature and location of employment, salary, other compensation, health insurance benefits, life insurance benefits, and other fringe benefits. Failure to so inform and advise University shall constitute a material breach of this Agreement and University's obligation to pay compensation under this provision shall end. Coach agrees not to accept employment for compensation at less than the fair value of Coach's services, as determined by all circumstances existing at the time of employment. Coach further agrees to repay to University all compensation paid to him by University after the date he obtains other employment, to which he is not entitled under this provision.

5.2.3 University has been represented by legal counsel, and Coach has either been represented by legal counsel or has chosen to proceed without legal counsel, in the contract negotiations and have bargained for and agreed to the foregoing liquidated damages provision, giving consideration to the fact that the Coach may lose certain benefits, supplemental compensation, or outside compensation relating to his employment with University, which damages are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by University and the acceptance thereof by Coach shall constitute adequate and reasonable compensation to Coach for the damages and injury suffered by Coach because of such termination by University. The liquidated damages are not, and shall not be construed to be, a penalty.

### 5.3 Termination by Coach for Convenience.

5.3.1 The Coach recognizes that his promise to work for University for the entire term of this Agreement is of the essence of this Agreement. The Coach also recognizes that the University is making a highly valuable investment in his employment by entering into this Agreement and that its investment would be lost were he to resign or otherwise terminate his employment with the University before the end of the contract term.

5.3.2 The Coach, for his own convenience, may terminate this Agreement during its term by giving prior written notice to the University. Termination shall be effective ten (10) days after notice is given to the University.

5.3.3 If the Coach terminates this Agreement for convenience at any time, all obligations of the University shall cease as of the effective date of the termination. If the Coach terminates this Agreement for his convenience he shall pay to the University, as liquidated damages and not a penalty, for the breach of this Agreement the following sum: (a) if the Agreement is terminated on or before June 1, 2014, the sum



of \$15,000; (b) if the Agreement is terminated between June 2, 2014 and June 1, 2015 inclusive, the sum of \$10,000; (c) if the Agreement is terminated between June 2, 2015 and June 1, 2016 inclusive, the sum of \$5,000; (d) if the Agreement is terminated between June 2, 2016, and June 1, 2017 inclusive, the sum of \$5,000. The liquidated damages shall be due and payable within twenty (20) days of the effective date of the termination, and any unpaid amount shall bear simple interest at a rate eight (8) percent per annum until paid.

5.3.4 University has been represented by legal counsel, and Coach has either been represented by legal counsel or has chosen to proceed without legal counsel, in the contract negotiations and have bargained for and agreed to the foregoing liquidated damages provision, giving consideration to the fact that the University will incur administrative and recruiting costs in obtaining a replacement for Coach, in addition to potentially increased compensation costs if Coach terminates this Agreement for convenience, which damages are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by Coach and the acceptance thereof by University shall constitute adequate and reasonable compensation to University for the damages and injury suffered by it because of such termination by Coach. The liquidated damages are not, and shall not be construed to be, a penalty. This section 5.3.4 shall not apply if Coach terminates this Agreement because of a material breach by the University.

5.3.5 Except as provided elsewhere in this Agreement, if Coach terminates this Agreement for convenience, he shall forfeit to the extent permitted by law his right to receive all supplemental compensation and other payments.

#### 5.4 Termination due to Disability or Death of Coach.

5.4.1 Notwithstanding any other provision of this Agreement, this Agreement shall terminate automatically if Coach becomes totally or permanently disabled as defined by the University's disability insurance carrier, becomes unable to perform the essential functions of the position of head coach, or dies.

5.4.2 If this Agreement is terminated because of Coach's death, Coach's salary and all other benefits shall terminate as of the last day worked, except that the Coach's personal representative or other designated beneficiary shall be paid all compensation due or unpaid and death benefits, if any, as may be contained in any fringe benefit plan now in force or hereafter adopted by the University and due to the Coach's estate or beneficiaries thereunder.

5.4.3 If this Agreement is terminated because the Coach becomes totally or permanently disabled as defined by the University's disability insurance carrier, or becomes unable to perform the essential functions of the position of head coach, all salary and other benefits shall terminate, except that the Coach shall be entitled to receive



any compensation due or unpaid and any disability-related benefits to which he is entitled by virtue of employment with the University.

5.5 Interference by Coach. In the event of termination, suspension, or reassignment, Coach agrees that Coach will not interfere with the University's student-athletes or otherwise obstruct the University's ability to transact business or operate its intercollegiate athletics program.

5.6 No Liability. The University shall not be liable to Coach for the loss of any collateral business opportunities or any other benefits, perquisites or income from any sources that may ensue as a result of any termination of this Agreement by either party or due to death or disability or the suspension or reassignment of Coach, regardless of the circumstances.

5.7 Waiver of Rights. Because the Coach is receiving a multi-year contract and the opportunity to receive supplemental compensation and because such contracts and opportunities are not customarily afforded to University employees, if the University suspends or reassigns Coach, or terminates this Agreement for good or adequate cause or for convenience, Coach shall have all the rights provided for in this Agreement but hereby releases the University from compliance with the notice, appeal, and similar employment-related rights provide for in the State Board of Education and Board or Regents of the University of Idaho Rule Manual (IDAPA 08) and Governing Policies and Procedures Manual, and the University Faculty-Staff Handbook.

## ARTICLE 6

6.1 Board Approval. This Agreement shall not be effective until and unless approved of the University's Board of Regents and executed by both parties as set forth below. In addition, the payment of any compensation pursuant to this agreement shall be subject to the approval of the University's Board of Regents, the President, and the Director; the sufficiency of legislative appropriations; the receipt of sufficient funds in the account from which such compensation is paid; and the Board of Regents and University's rules regarding financial exigency.

6.2 University Property. All personal property (excluding vehicle(s) provided through the Vandal Wheels program), material, and articles of information, including, without limitation, keys, credit cards, personnel records, recruiting records, team information, films, statistics or any other personal property, material, or data, furnished to Coach by the University or developed by Coach on behalf of the University or at the University's direction or for the University's use or otherwise in connection with Coach's employment hereunder are and shall remain the sole property of the University. Within twenty-four (24) hours of the expiration of the term of this agreement or its earlier termination as provided herein, Coach shall immediately cause any such personal property, materials, and articles of information in Coach's possession or control to be delivered to the Director.



6.3 Assignment. Neither party may assign its rights or delegate its obligations under this Agreement without the prior written consent of the other party.

6.4 Waiver. No waiver of any default in the performance of this Agreement shall be effective unless in writing and signed by the waiving party. The waiver of a particular breach in the performance of this Agreement shall not constitute a waiver of any other or subsequent breach. The resort to a particular remedy upon a breach shall not constitute a waiver of any other available remedies.

6.5 Severability. If any provision of this Agreement is determined to be invalid or unenforceable, the remainder of the Agreement shall not be affected and shall remain in effect.

6.6 Governing Law. This Agreement shall be subject to and construed in accordance with the laws of the state of Idaho as an agreement to be performed in Idaho. Any action based in whole or in part on this Agreement shall be brought in the courts of the state of Idaho.

6.7 Oral Promises. Oral promises of an increase in annual salary or of any supplemental or other compensation shall not be binding upon the University.

6.8 Force Majeure. Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes therefor, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the reasonable control of the party obligated to perform (including financial inability), shall excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

6.9 Confidentiality. The Coach hereby consents and agrees that this document may be released and made available to the public after it is signed by the Coach. The Coach further agrees that all documents and reports he is required to produce under this Agreement may be released and made available to the public at the University's sole discretion.

6.10 Notices. Any notice under this Agreement shall be in writing and be delivered in person or by public or private courier service (including U.S. Postal Service Express Mail) or certified mail with return receipt requested or by facsimile. All notices shall be addressed to the parties at the following addresses or at such other addresses as the parties may from time to time direct in writing:

the University:	Director of Athletics
	University of Idaho
	P.O. Box 442302
	Moscow, Idaho 83844-2302



with a copy to: President  
University of Idaho  
P.O. Box 443151  
Moscow, ID 83844-3151

the Coach: Wayne Phipps  
Last known address on file with  
University's Human Resource Services

Any notice shall be deemed to have been given on the earlier of: (a) actual delivery or refusal to accept delivery, (b) the date of mailing by certified mail, or (c) the day facsimile delivery is verified. Actual notice, however and from whomever received, shall always be effective.

6.11 Headings. The headings contained in this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation hereof.

6.12 Binding Effect. This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties and their respective heirs, legal representatives, successors and assigns.

6.13 Non-Use of Names and Trademarks. The Coach shall not, without the University's prior written consent in each case, use any name, trade name, trademark, or other designation of the University (including contraction, abbreviation or simulation), except in the course and scope of his official University duties.

6.14 No Third Party Beneficiaries. There are no intended or unintended third party beneficiaries to this Agreement.

6.15 Entire Agreement; Amendments. This Agreement constitutes the entire agreement of the parties and supersedes all prior agreements and understandings with respect to the same subject matter. No amendment or modification of this Agreement shall be effective unless in writing, signed by both parties, and approved by University's Board of Regents.

6.16 Opportunity to Consult with Attorney. The Coach acknowledges that he has had the opportunity to consult and review this Agreement with an attorney and has either consulted with legal counsel or chosen not to. Accordingly, in all cases, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any party.



UNIVERSITY

COACH

\_\_\_\_\_  
Duane Nellis, President

\_\_\_\_\_  
Date

\_\_\_\_\_  
Wayne Phipps,

\_\_\_\_\_  
Date

Approved by the Board of Regents on the \_\_\_\_ day of October, 2012.



~~(MODEL ATHLETICS CONTRACT)~~

## EMPLOYMENT AGREEMENT

This Employment Agreement (Agreement) is entered into by and between \_\_\_\_\_~~(the~~ University ~~(College)~~of Idaho ~~(University)~~, and \_\_\_\_\_~~Wayne Phipps~~ (Coach).

## ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University ~~(College)~~ shall employ Coach as the ~~head coach~~ Director of its intercollegiate ~~(Sport) team (Team~~ track and field and cross country teams (Teams). Coach represents and warrants that Coach is fully qualified to serve, and is available for employment, in this capacity.

1.2. Reporting Relationship. Coach shall report and be responsible directly to the University ~~(College)~~'s Director of Athletics (Director) or the Director's designee. Coach shall abide by the reasonable instructions of Director or the Director's designee and shall confer with the Director or the Director's designee on all administrative and technical matters. Coach shall also be under the general supervision of the University ~~(College)~~'s President (President).

1.3. Duties. Coach shall manage and supervise the ~~Team~~ Teams and shall perform such other duties in the University ~~(College)~~'s athletic program as the Director may assign and as may be described elsewhere in this Agreement. The University ~~(College)~~ shall have the right, at any time, to reassign Coach to duties at the University ~~(College)~~ other than as head coach of the ~~Team~~ Teams, provided that Coach's compensation and benefits shall not be affected by any such reassignment, except that the opportunity to earn supplemental compensation as provided in sections 3.2.1 through ~~(Depending on supplemental pay provisions used)~~ 3.2.7 shall cease.

## ARTICLE 2

2.1. Term. This Agreement is for a fixed-term appointment of ~~\_\_\_\_\_~~ five (— 5) years, commencing on ~~\_\_\_\_\_~~ August 13, 2012, and terminating, without further notice to Coach, on ~~\_\_\_\_\_~~ August 12, 2017, unless sooner terminated in accordance with other provisions of this Agreement.

2.2. Extension or Renewal. This Agreement is renewable solely upon an offer from the University ~~(College)~~ and an acceptance by Coach, both of which must be in writing and signed by the parties. Any renewal is subject to the prior approval of University ~~(College)~~'s Board of ~~(Regents or Trustees)~~. This Agreement in no way grants to Coach a claim to tenure in employment, nor shall Coach's service pursuant to this agreement count in any way toward tenure at the University ~~(College)~~.

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## ARTICLE 3

3.1 Regular Compensation.

3.1.1 In consideration of Coach's services and satisfactory performance of this Agreement, the University ~~(College)~~ shall provide to Coach:

- a) An annual salary of \$~~\_\_\_\_\_~~ 63,252.80 per year, payable in biweekly installments in accordance with normal University ~~(College) procedures, and such salary increases as may be determined appropriate~~ procedures. Coach will be eligible to receive University-wide changes in employee compensation approved by the Director and President ~~and approved by the University (College)'s Board of (Regents or Trustees) \_\_\_\_\_~~;
- b) The opportunity to receive such employee benefits as the University ~~(College)~~ provides generally to non-faculty exempt employees; and
- c) The opportunity to receive such employee benefits as the University ~~(College)~~'s Department of Athletics (Department) provides generally to its employees of a comparable level. Coach hereby agrees to abide by the terms and conditions, as now existing or hereafter amended, of such employee benefits.

3.2 Supplemental Compensation

3.2.1. Each year one of the Team Teams is the conference champion or co-champion and ~~also becomes eligible for a (bowl game pursuant to NCAA Division I guidelines or post season tournament or post season playoffs), and~~ if Coach continues to be employed as University ~~(College)~~'s co-head (Sport) coach of its intercollegiate track and field and cross country teams as of the ensuing July 1st, the University ~~(College)~~ shall pay to Coach supplemental compensation ~~in an amount equal to (amount or computation) of Coach's Annual Salary of \$1,000~~ during the fiscal year in which the championship ~~and (bowl or other post season) eligibility are achieved. The University (College) is achieved. If more than one Team is the conference champion or co-champion, the amount of supplemental compensation will be \$1,000 for each conference champion or co-champion. The University~~ shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.2. 3.2.2 Each year one of the Team is ranked in the top 25 in the ~~(national rankings, such as final ESPN/USA Today coaches poll of Division IA)~~

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~~football teams)~~ teams finishes in the top 20 in the NCAA championships and if Coach continues to be employed as University ~~(College)~~'s ~~co-head~~ ~~(Sport)~~ coach of its intercollegiate track and field and cross country teams as of the ensuing July 1st, the University ~~(College)~~ shall pay to Coach supplemental compensation ~~in an amount equal to (amount or computation)~~ of Coach's Annual Salary in effect on the date of the final poll. The University (College) of \$1,000. If more than one Team places in the Top 20 at the NCAA championships, the Coach will earn supplemental compensation of \$1,000 for each Top 20 finish. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.3. For each individual National Champion in intercollegiate track and field and cross country and if Coach continues to be employed as University's head of its intercollegiate track and field and cross country teams as of the ensuing July 1<sup>st</sup>, the University shall pay to Coach supplemental compensation of \$500 for each individual champion.

~~3.2.3~~ 3.2.4 Each year Coach shall be eligible to receive supplemental compensation ~~in an amount up to (amount or computation)~~ based on the academic achievement and behavior of Team members. ~~The determination of whether Coach will receive such supplemental compensation and the timing of the payment(s) shall be at the discretion of the President in consultation with the Director and approved by the University (College)'s Board of (Regents or Trustees).~~ The determination shall be based on the following factors: grade point averages; difficulty of major course of study; honors such as scholarships, designation as Academic All-American, and conference academic recognition; progress toward graduation for all athletes, but particularly those who entered the University (College) as academically at-risk students; the conduct of Team members on the University (College) campus, at authorized University (College) activities, in the community, and elsewhere. if the single year team Academic Progress Rate ("APR") for the Team meets the following levels in the National Ranking as follows:

National score within sport

975 – 979 = \$250 per team

980 – 985 = \$300 per team

986 – 990 = \$400 per team

990 and above = \$450 per team

Any such supplemental compensation paid to Coach shall be accompanied with a ~~detailed~~ justification for the supplemental compensation based on the factors listed above, and such justification shall be separately reported to the Board of ~~(Regents or Trustees)~~ as a document available to the public under the Idaho Public Records Act.

~~3.2.4 Each year~~ 3.2.5 Each year Coach is named Conference Coach of the Year or Conference Co-Coach of the year, and if Coach continues to be employed as University's head of its track and field and cross country teams as of the ensuing July 1st,

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Coach shall ~~be eligible to~~ receive supplemental compensation ~~in an amount up to (amount or computation) based on the overall development of the intercollegiate (men's/women's) (Sport) program; ticket sales; fundraising; outreach by Coach to various constituency groups, including University (College) students, staff, faculty, alumni and boosters; and any other factors the President wishes to consider. The determination of whether Coach will receive~~ of \$1,000. If the Coach is named Conference Coach of the Year or Conference Co-Coach of the year for both the men's and women's track and field and cross country teams, Coach will receive \$1,000 for each award. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation and the timing of the payment(s) shall be at the discretion of the President in consultation with the Director and approved by the University (College)'s Board of (Regents or Trustees).

~~3.2.5~~ 3.2.6 The Coach shall receive the sum of ~~(amount or computation)~~ \$8,000 from the University ~~(College)~~ or the University ~~(College)~~'s designated media outlet(s) or a combination thereof each year during the term of this Agreement in compensation for participation in media programs and public appearances (Programs). ~~Coach~~ Each year, one-half of this sum shall be paid prior to the first indoor track meet, and one-half shall be paid no later than two weeks after the last outdoor track and field meet. Coach's right to receive the second half of such a payment shall vest on the date of the Team's last regular season or post-season competition, whichever occurs later. This sum shall be paid (terms or conditions of payment) ., provided Coach has fully participated in media programs and public appearances through that date. Coach's right to receive any such media payment under this Paragraph is expressly contingent upon the following: (1) academic achievement and behavior of Team members; (2) appropriate behavior by, and supervision of, all assistant coaches, as determined by the Director; and (3) Coach's compliance with University's financial stewardship policies as set forth in University's Administrative Procedures Manual Chapter 25. Agreements requiring the Coach to participate in Programs related to his duties as an employee of University (College) are the property of the University (College). The University (College) shall have the exclusive right to negotiate and contract with all producers of media productions and all parties desiring public appearances by the Coach. Coach agrees to cooperate with the University (College) in order for the Programs to be successful and agrees to provide his services to and perform on the Programs and to cooperate in their production, broadcasting, and telecasting. It is understood that neither Coach nor any assistant coaches shall appear without the prior written approval of the Director on any competing radio or television program (including but not limited to a coach's show, call-in show, or interview show) or a regularly scheduled news segment, except that this prohibition shall not apply to routine news media interviews for which no compensation is received. Without the prior written approval of the Director, Coach shall not appear in any commercial endorsements which that are broadcast on radio or television that conflict with those broadcast on the University (College)'s designated media outlets.

~~3.2.6 (SUMMER CAMP OPERATED BY UNIVERSITY (COLLEGE))~~ 3.2.7 Coach agrees that the University ~~(College)~~ has the exclusive right to

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operate ~~youth (Sport)~~ track and field and cross country camps on its campus using University ~~(College)~~ facilities. The University ~~(College)~~ shall allow Coach the opportunity to earn supplemental compensation by assisting with the University ~~(College)~~'s camps in Coach's capacity as a University ~~(College)~~ employee. Coach hereby agrees to assist in the marketing, supervision, and general administration of the University ~~(College)~~'s football's track and field camps. Coach also agrees that Coach will perform all obligations mutually agreed upon by the parties. ~~In exchange for Coach's participation in the University (College)'s summer football camps, the University (College) shall pay Coach (amount) per year as supplemental compensation during each year of his employment as head (Sport) coach at the University (College). This amount shall be paid (terms of payment).~~

~~(SUMMER CAMP OPERATED BY COACH) Coach may operate a summer youth (Sport) camp at the University (College) under the following conditions:~~

- ~~a) The summer youth camp operation reflects positively on the University (College) and the Department;~~
- ~~b) The summer youth camp is operated by Coach directly or through a private enterprise owned and managed by Coach. The Coach shall not use University (College) personnel, equipment, or facilities without the prior written approval of the Director;~~
- ~~c) Assistant coaches at the University (College) are given priority when the Coach or the private enterprise selects coaches to participate;~~
- ~~d) The Coach complies with all NCAA (NAIA), Conference, and University (College) rules and regulations related, directly or indirectly, to the operation of summer youth camps;~~
- ~~e) The Coach or the private enterprise enters into a contract with University (College) and \_\_\_\_\_ (campus concessionaire) for all campus goods and services required by the camp.~~
- ~~f) The Coach or private enterprise pays for use of University (College) facilities including the \_\_\_\_\_.~~
- ~~g) Within thirty days of the last day of the summer youth camp(s), Coach shall submit to the Director a preliminary "Camp Summary Sheet" containing financial and other information related to the operation of the camp. Within~~

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~~ninety days of the last day of the summer youth camp(s); Coach shall submit to Director a final accounting and "Camp Summary Sheet." A copy of the "Camp Summary Sheet" is attached to this Agreement as an exhibit.~~

- ~~h) The Coach or the private enterprise shall provide proof of liability insurance as follows: (1) liability coverage: spectator and staff \$1 million; (2) catastrophic coverage: camper and staff \$1 million maximum coverage with \$100 deductible;~~
- ~~i) To the extent permitted by law, the Coach or the private enterprise shall defend and indemnify the University (College) against any claims, damages, or liabilities arising out of the operation of the summer youth camp(s)~~
- ~~j) All employees of the summer youth camp(s) shall be employees of the Coach or the private enterprise and not the University (College) while engaged in camp activities. The Coach and all other University (College) employees involved in the operation of the camp(s) shall be on annual leave status or leave without pay during the days the camp is in operation. The Coach or private enterprise shall provide workers' compensation insurance in accordance with Idaho law and comply in all respects with all federal and state wage and hour laws~~

~~In the event of termination of this Agreement, suspension, or reassignment, University (College) shall not be under any obligation to permit a summer youth camp to be held by the Coach after the effective date of such termination, suspension, or reassignment, and the University (College) shall be released from all obligations relating thereto.~~

~~3.2.7~~ 3.2.8 Coach agrees that the University ~~(College)~~ has the exclusive right to select footwear, apparel and/or equipment for the use of its student-athletes and staff, including Coach, during official practices and games and during times when Coach or the Team is being filmed by motion picture or video camera or posing for photographs in their capacity as representatives of University ~~(College)~~. Coach recognizes that the University ~~(College)~~ is negotiating or has entered into an agreement with ~~—(Company Name)—Nike~~ to supply the University ~~(College)~~ with athletic footwear, apparel and/or equipment. Coach agrees that, upon the University ~~(College)~~'s reasonable request, Coach will consult with appropriate parties concerning ~~an —(Company Name)—Nike~~ product's design or performance, shall act as an instructor at a clinic sponsored in whole or in part by ~~—(Company Name)—Nike~~, or give a lecture at an event sponsored in whole or in part by ~~—(Company Name)—Nike~~, or make other educationally-related appearances as may be reasonably requested by the University ~~(College)~~. Notwithstanding the

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foregoing sentence, Coach shall retain the right to decline such appearances as Coach reasonably determines to conflict with or hinder his duties and obligations as ~~co-head~~ ~~(Sport)~~ track and field and cross country coach. In order to avoid entering into an agreement with a competitor of ~~(Company Name)~~ Nike, Coach shall submit all outside consulting agreements to the University ~~(College)~~ for review and approval prior to execution. Coach shall also report such outside income to the University ~~(College)~~ in accordance with NCAA ~~(or NAIA)~~ rules. Coach further agrees that Coach will not endorse any athletic footwear, apparel and/or equipment products, including ~~(Company Name)~~ Nike, and will not participate in any messages or promotional appearances which contain a comparative or qualitative description of athletic footwear, apparel or equipment products.

3.3 General Conditions of Compensation. All compensation provided by the University ~~(College)~~ to Coach is subject to deductions and withholdings as required by law or the terms and conditions of any fringe benefit in which Coach participates. However, if any fringe benefit is based in whole or in part upon the compensation provided by the University ~~(College)~~ to Coach, such fringe benefit shall be based only on the compensation provided pursuant to section 3.1.1, except to the extent required by the terms and conditions of a specific fringe benefit program.

#### ARTICLE 4

4.1. Coach's Specific Duties and Responsibilities. In consideration of the compensation specified in this Agreement, Coach, in addition to the obligations set forth elsewhere in this Agreement, shall:

4.1.1. Devote Coach's full time and best efforts to the performance of Coach's duties under this Agreement;

4.1.2. Develop and implement programs and procedures with respect to the evaluation, recruitment, training, and coaching of Team members which enable them to compete successfully and reasonably protect their health, safety, and well-being;

4.1.3. Observe and uphold all academic standards, requirements, and policies of the University ~~(College)~~ and encourage Team members to perform to their highest academic potential and to graduate in a timely manner; and

4.1.4. Know, recognize, and comply with all applicable laws and the policies, rules and regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, and the NCAA ~~(or NAIA)~~; supervise and take appropriate steps to ensure that Coach's assistant coaches, any other employees for whom Coach is administratively responsible, and the members of the Team know, recognize, and comply with all such laws, policies, rules and regulations; and immediately report to the Director and to the Department's Director of Compliance if Coach has reasonable cause to believe that any person or entity, including without limitation representatives of the University ~~(College)~~'s athletic interests, has violated or

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is likely to violate any such laws, policies, rules or regulations. Coach shall cooperate fully with the University ~~(College)~~ and Department at all times. The names or titles of employees whom Coach supervises are attached as Exhibit C. The applicable laws, policies, rules, and regulations include: (a) State Board of Education and Board of Regents of the University of Idaho Governing Policies and Procedures and Rule Manual; (b) University ~~(College)~~'s Handbook; (c) University ~~(College)~~'s Administrative Procedures Manual; (d) the policies of the Department; (e) NCAA ~~(or NAIA)~~ rules and regulations; and (f) the rules and regulations of the ~~(Sport)~~ track and field conference of which the University ~~(College)~~ is a member.

4.2 Outside Activities. Coach shall not undertake any business, professional or personal activities, or pursuits that would prevent Coach from devoting Coach's full time and best efforts to the performance of Coach's duties under this Agreement, that would otherwise detract from those duties in any manner, or that, in the opinion of the University ~~(College)~~, would reflect adversely upon the University ~~(College)~~ or its athletic program. Subject to the terms and conditions of this Agreement, Coach may, with the prior written approval of the Director, who may consult with the President, enter into separate arrangements for outside activities and endorsements which are consistent with Coach's obligations under this Agreement. Coach may not use the University ~~(College)~~'s name, logos, or trademarks in connection with any such arrangements without the prior written approval of the Director and the President.

4.3 NCAA ~~(or NAIA)~~ Rules. In accordance with NCAA ~~(or NAIA)~~ rules, Coach shall obtain prior written approval from the University ~~(College)~~'s President for all athletically related income and benefits from sources outside the University ~~(College)~~ and shall report the source and amount of all such income and benefits to the University ~~(College)~~'s President whenever reasonably requested, but in no event less than annually before the close of business on June 30th of each year or the last regular University ~~(College)~~ work day preceding June 30th. The report shall be in a format reasonably satisfactory to University ~~(College)~~. Sources of such income include, but are not limited to, the following:

- (a) Income from annuities;
- (b) Sports camps;
- (c) Housing benefits, including preferential housing arrangements;
- (d) Country club memberships;
- (e) Complimentary ticket sales;
- (f) Television and radio programs; and
- (g) Endorsement or consultation contracts with athletics shoe, apparel or equipment manufacturers.

In no event shall Coach accept or receive directly or indirectly any monies, benefits, or gratuities whatsoever from any person, association, corporation, University ~~(College)~~ booster club, University ~~(College)~~ alumni association, University ~~(College)~~ foundation, or other benefactor, if the acceptance or receipt of the monies, benefits, or gratuities would violate applicable law or the policies, rules, and regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(or NAIA)~~.

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4.4 Hiring Authority. Coach shall have the responsibility and the sole authority to recommend to the Director the hiring and termination of assistant coaches for the Team, but the decision to hire or terminate an assistant coach shall be made by the Director and shall, when necessary or appropriate, be subject to the approval of President and the University ~~(College)~~'s Board of ~~(Trustees or Regents)~~.

4.5 Scheduling. Coach shall consult with, and may make recommendations to, the Director or the Director's designee with respect to the scheduling of Team competitions, but the final decision shall be made by the Director or the Director's designee.

~~4.7~~4.6 Other Coaching Opportunities. Coach shall not, under any circumstances, interview for, negotiate for, or accept employment as a coach at any other institution of higher education or with any professional sports team, requiring performance of duties prior to the expiration of this Agreement, without the prior approval of the Director. Such approval shall not unreasonably be withheld.

## ARTICLE 5

5.1 Termination of Coach for Cause. The University ~~(College)~~ may, in its discretion, suspend Coach from some or all of Coach's duties, temporarily or permanently, and with or without pay; reassign Coach to other duties; or terminate this Agreement at any time for good or adequate cause, as those terms are defined in applicable rules and regulations.

5.1.1 In addition to the definitions contained in applicable rules and regulations, University ~~(College)~~ and Coach hereby specifically agree that the following shall constitute good or adequate cause for suspension, reassignment, or termination of this Agreement:

- a) A deliberate or major violation of Coach's duties under this agreement or the refusal or unwillingness of Coach to perform such duties in good faith and to the best of Coach's abilities;
- b) The failure of Coach to remedy any violation of any of the terms of this agreement within 30 days after written notice from the University ~~(College)~~;
- c) A deliberate or major violation by Coach of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference or the NCAA ~~(NAIA)~~, including but not limited to any such violation which may have occurred during the employment of Coach at another NCAA or NAIA member institution;
- d) Ten (10) working days' absence of Coach from duty without the University ~~(College)~~'s consent;

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- e) Any conduct of Coach that constitutes moral turpitude or that would, in the University ~~(College)~~'s judgment, reflect adversely on the University ~~(College)~~ or its athletic programs;
- f) The failure of Coach to represent the University ~~(College)~~ and its athletic programs positively in public and private forums;
- g) The failure of Coach to fully and promptly cooperate with the NCAA ~~(NAIA)~~ or the University ~~(College)~~ in any investigation of possible violations of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(NAIA)~~;
- h) The failure of Coach to report a known violation of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(NAIA)~~, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team; or
- i) A violation of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(NAIA)~~, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team if Coach knew or should have known of the violation and could have prevented it by ordinary supervision.

5.1.2 Suspension, reassignment, or termination for good or adequate cause shall be effectuated by the University ~~(College)~~ as follows: before the effective date of the suspension, reassignment, or termination, the Director or his or her designee shall provide Coach with notice, which notice shall be accomplished in the manner provided for in this Agreement and shall include the reason(s) for the contemplated action. Coach shall then have an opportunity to respond. After Coach responds or fails to respond, University ~~(College)~~ shall notify Coach whether, and if so when, the action will be effective.

5.1.3 In the event of any termination for good or adequate cause, the University ~~(College)~~'s obligation to provide compensation and benefits to Coach, whether direct, indirect, supplemental or collateral, shall cease as of the date of such termination, and the University ~~(College)~~ shall not be liable for the loss of any collateral business opportunities or other benefits, perquisites, or income resulting from outside activities or from any other sources.



5.1.4 If found in violation of NCAA-~~(NAIA)~~ regulations, Coach shall, in addition to the provisions of Section 5.1, be subject to disciplinary or corrective action as set forth in the provisions of the NCAA-~~(NAIA)~~ enforcement procedures. This section applies to violations occurring at the University-~~(College)~~ or at previous institutions at which the Coach was employed.

5.2 Termination of Coach for Convenience of University-~~(College)~~.

5.2.1 At any time after commencement of this Agreement, University-~~(College)~~, for its own convenience, may terminate this Agreement by giving ten (10) days prior written notice to Coach.

5.2.2 In the event that University-~~(College)~~ terminates this Agreement for its own convenience, University-~~(College)~~ shall be obligated to pay Coach, as liquidated damages and not a penalty, the salary set forth in section 3.1.1(a), excluding all deductions required by law, on the regular paydays of University-~~(College)~~ until the term of this Agreement ends; provided, however, in the event Coach obtains other employment of any kind or nature after such termination, then the amount of compensation the University pays will be adjusted and reduced by the amount of compensation paid Coach as a result of such other employment, such adjusted compensation to be calculated for each University pay-period by reducing the gross salary set forth in section 3.1.1(a) (before deductions required by law) by the gross compensation paid to Coach under the other employment, then subtracting from this adjusted gross compensation deduction according to law. In addition, Coach will be entitled to continue his health insurance plan and group life insurance as if he remained a University-~~(College)~~ employee until the term of this Agreement ends or until Coach obtains ~~employment or any other employment providing Coach with a~~ reasonably comparable ~~health plan and group life insurance~~employment, whichever occurs first. Coach shall be entitled to no other compensation or fringe benefits, except as otherwise provided herein or required by law. Coach specifically agrees to inform University within ten business days of obtaining other employment, and to advise University of all relevant terms of such employment, including without limitation the nature and location of employment, salary, other compensation, health insurance benefits, life insurance benefits, and other fringe benefits. Failure to so inform and advise University shall constitute a material breach of this Agreement and University's obligation to pay compensation under this provision shall end. Coach agrees not to accept employment for compensation at less than the fair value of Coach's services, as determined by all circumstances existing at the time of employment. Coach further agrees to repay to University all compensation paid to him by University after the date he obtains other employment, to which he is not entitled under this provision.

5.2.3 ~~The parties have both~~University has been represented by legal counsel, ~~and Coach has either been represented by legal counsel or has chosen to proceed without legal counsel~~, in the contract negotiations and have bargained for and agreed to the foregoing liquidated damages provision, giving consideration to the fact that the Coach may lose certain benefits, supplemental compensation, or outside compensation

*Model Contract version: 12/9/2010*



relating to his employment with University ~~(College)~~, which damages are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by University ~~(College)~~ and the acceptance thereof by Coach shall constitute adequate and reasonable compensation to Coach for the damages and injury suffered by Coach because of such termination by University ~~(College)~~. The liquidated damages are not, and shall not be construed to be, a penalty.

### 5.3 Termination by Coach for Convenience.

5.3.1 The Coach recognizes that his promise to work for University ~~(College)~~ for the entire term of this Agreement is of the essence of this Agreement. The Coach also recognizes that the University ~~(College)~~ is making a highly valuable investment in his employment by entering into this Agreement and that its investment would be lost were he to resign or otherwise terminate his employment with the University ~~(College)~~ before the end of the contract term.

5.3.2 The Coach, for his own convenience, may terminate this Agreement during its term by giving prior written notice to the University ~~(College)~~. Termination shall be effective ten (10) days after notice is given to the University ~~(College)~~.

5.3.3 If the Coach terminates this Agreement for convenience at any time, all obligations of the University ~~(College)~~ shall cease as of the effective date of the termination. If the Coach terminates this Agreement for his convenience he shall pay to the University ~~(College)~~, as liquidated damages and not a penalty, for the breach of this Agreement the following sum: (a) if the Agreement is terminated on or before June 1, 2014, the sum of ~~\$30,000.00~~ 15,000; (b) if the Agreement is terminated between June 2, 2014 and June 1, 2015 inclusive, the sum of ~~\$20,000.00~~ 10,000; (c) if the Agreement is terminated between June 2, 2015 and June 1, 2016 inclusive, the sum of ~~\$10,000.00~~ 5,000; (d) if the Agreement is terminated between June 2, 2016, and June 1, 2017 inclusive, the sum of \$5,000. The liquidated damages shall be due and payable within twenty (20) days of the effective date of the termination, and any unpaid amount shall bear simple interest at a rate eight (8) percent per annum until paid.

5.3.4 ~~The parties have both~~ University has been represented by legal counsel, ~~and Coach has either been represented by legal counsel or has chosen to proceed without legal counsel,~~ in the contract negotiations and have bargained for and agreed to the foregoing liquidated damages provision, giving consideration to the fact that the University ~~(College)~~ will incur administrative and recruiting costs in obtaining a replacement for Coach, in addition to potentially increased compensation costs if Coach terminates this Agreement for convenience, which damages are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by Coach and the acceptance thereof by

*Model Contract version: 12/9/2010*



University~~-(College)~~ shall constitute adequate and reasonable compensation to University~~-(College)~~ for the damages and injury suffered by it because of such termination by Coach. The liquidated damages are not, and shall not be construed to be, a penalty. This section 5.3.4 shall not apply if Coach terminates this Agreement because of a material breach by the University~~-(College)~~.

5.3.5 Except as ~~provide~~provided elsewhere in this Agreement, if Coach terminates this Agreement for convenience, he shall forfeit to the extent permitted by law his right to receive all supplemental compensation and other payments.

#### 5.4 Termination due to Disability or Death of Coach.

5.4.1 Notwithstanding any other provision of this Agreement, this Agreement shall terminate automatically if Coach becomes totally or permanently disabled as defined by the University~~-(College)~~'s disability insurance carrier, becomes unable to perform the essential functions of the position of head coach, or dies.

5.4.2 If this Agreement is terminated because of Coach's death, Coach's salary and all other benefits shall terminate as of the last day worked, except that the Coach's personal representative or other designated beneficiary shall be paid all compensation due or unpaid and death benefits, if any, as may be contained in any fringe benefit plan now in force or hereafter adopted by the University ~~-(College)~~ and due to the Coach's estate or beneficiaries thereunder.

5.4.3 If this Agreement is terminated because the Coach becomes totally or permanently disabled as defined by the University~~-(College)~~'s disability insurance carrier, or becomes unable to perform the essential functions of the position of head coach, all salary and other benefits shall terminate, except that the Coach shall be entitled to receive any compensation due or unpaid and any disability-related benefits to which he is entitled by virtue of employment with the University ~~-(College)~~.

5.5 Interference by Coach. In the event of termination, suspension, or reassignment, Coach agrees that Coach will not interfere with the University~~-(College)~~'s student-athletes or otherwise obstruct the University~~-(College)~~'s ability to transact business or operate its intercollegiate athletics program.

~~5.7~~5.6 No Liability. The University~~-(College)~~ shall not be liable to Coach for the loss of any collateral business opportunities or any other benefits, perquisites or income from any sources that may ensue as a result of any termination of this Agreement by either party or due to death or disability or the suspension or reassignment of Coach, regardless of the circumstances.

~~5.8~~5.7 Waiver of Rights. Because the Coach is receiving a multi-year contract and the opportunity to receive supplemental compensation and because such contracts and opportunities are not customarily afforded to University~~-(College)~~ employees, if the

*Model Contract version: 12/9/2010*



University ~~(College)~~ suspends or reassigns Coach, or terminates this Agreement for good or adequate cause or for convenience, Coach shall have all the rights provided for in this Agreement but hereby releases the University ~~(College)~~ from compliance with the notice, appeal, and similar employment-related rights provide for in the State Board of Education and Board or Regents of the University of Idaho Rule Manual (IDAPA 08) and Governing Policies and Procedures Manual, and the University ~~(College)~~ Faculty-Staff Handbook.

## ARTICLE 6

6.1 Board Approval. This Agreement shall not be effective until and unless approved of the University ~~(College)~~'s Board of ~~-(Regents-or-Trustees)-~~ and executed by both parties as set forth below. In addition, the payment of any compensation pursuant to this agreement shall be subject to the approval of the University ~~(College)~~'s Board of ~~-(Regents-or-Trustees)-~~, the President, and the Director; the sufficiency of legislative appropriations; the receipt of sufficient funds in the account from which such compensation is paid; and the Board of ~~-(Regents or-Trustees)-~~ and University ~~(College)~~'s rules regarding financial exigency.

6.2 University ~~(College)~~ Property. All personal property (excluding vehicle(s) provided through the Vandal Wheels program), material, and articles of information, including, without limitation, keys, credit cards, personnel records, recruiting records, team information, films, statistics or any other personal property, material, or data, furnished to Coach by the University ~~(College)~~ or developed by Coach on behalf of the University ~~(College)~~ or at the University ~~(College)~~'s direction or for the University ~~(College)~~'s use or otherwise in connection with Coach's employment hereunder are and shall remain the sole property of the University ~~(College)~~. Within twenty-four (24) hours of the expiration of the term of this agreement or its earlier termination as provided herein, Coach shall immediately cause any such personal property, materials, and articles of information in Coach's possession or control to be delivered to the Director.

6.3 Assignment. Neither party may assign its rights or delegate its obligations under this Agreement without the prior written consent of the other party.

6.4 Waiver. No waiver of any default in the performance of this Agreement shall be effective unless in writing and signed by the waiving party. The waiver of a particular breach in the performance of this Agreement shall not constitute a waiver of any other or subsequent breach. The resort to a particular remedy upon a breach shall not constitute a waiver of any other available remedies.

6.5 Severability. If any provision of this Agreement is determined to be invalid or unenforceable, the remainder of the Agreement shall not be affected and shall remain in effect.

*Model Contract version: 12/9/2010*



6.6 Governing Law. This Agreement shall be subject to and construed in accordance with the laws of the state of Idaho as an agreement to be performed in Idaho. Any action based in whole or in part on this Agreement shall be brought in the courts of the state of Idaho.

6.7 Oral Promises. Oral promises of an increase in annual salary or of any supplemental or other compensation shall not be binding upon the University ~~(College)~~.

6.8 Force Majeure. Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes therefor, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the reasonable control of the party obligated to perform (including financial inability), shall excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

6.9 Confidentiality. The Coach hereby consents and agrees that this document may be released and made available to the public after it is signed by the Coach. The Coach further agrees that all documents and reports he is required to produce under this Agreement may be released and made available to the public at the University ~~(College)~~'s sole discretion.

6.10 Notices. Any notice under this Agreement shall be in writing and be delivered in person or by public or private courier service (including U.S. Postal Service Express Mail) or certified mail with return receipt requested or by facsimile. All notices shall be addressed to the parties at the following addresses or at such other addresses as the parties may from time to time direct in writing:

the University ~~(College)~~:

Director of Athletics  
 \_\_\_\_\_ [University of Idaho](#)  
 \_\_\_\_\_ [P.O. Box 442302](#)  
[Moscow, Idaho 83844-2302](#)

with a copy to:

President  
 \_\_\_\_\_ [University of Idaho](#)  
 \_\_\_\_\_ [P.O. Box 443151](#)  
[Moscow, ID 83844-3151](#)

the Coach:

\_\_\_\_\_ [Wayne Phipps](#)  
 Last known address on file with  
 University ~~(College)~~'s Human Resource Services



Any notice shall be deemed to have been given on the earlier of: (a) actual delivery or refusal to accept delivery, (b) the date of mailing by certified mail, or (c) the day facsimile delivery is verified. Actual notice, however and from whomever received, shall always be effective.

6.11 Headings. The headings contained in this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation hereof.

6.12 Binding Effect. This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties and their respective heirs, legal representatives, successors and assigns.

6.13 Non-Use of Names and Trademarks. The Coach shall not, without the University-~~(College)~~'s prior written consent in each case, use any name, trade name, trademark, or other designation of the University-~~(College)~~ (including contraction, abbreviation or simulation), except in the course and scope of his official University-~~(College)~~ duties.

6.14 No Third Party Beneficiaries. There are no intended or unintended third party beneficiaries to this Agreement.

6.15 Entire Agreement; Amendments. This Agreement constitutes the entire agreement of the parties and supersedes all prior agreements and understandings with respect to the same subject matter. No amendment or modification of this Agreement shall be effective unless in writing, signed by both parties, and approved by University-~~(College)~~'s Board of ~~-(Regents or Trustees)-~~.

6.16 Opportunity to Consult with Attorney. The Coach acknowledges that he has had the opportunity to consult and review this Agreement with an attorney and has either consulted with legal counsel or chosen not to. Accordingly, in all cases, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any party.

UNIVERSITY ~~(COLLEGE)~~

COACH

Duane Nellis , President Date

Wayne Phipps,

Date

~~Date~~

Approved by the Board of ~~-(Regents or Trustees)-~~ on the \_\_\_\_ day of \_\_\_\_\_, ~~2010~~ August, 2012.

*Model Contract version: 12/9/2010*



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## Wayne Phipps

<b>Position:</b>	Director of Track & Field
<b>Alma Mater:</b>	British Columbia
<b>Graduating Year:</b>	1991
<b>Phone:</b>	(208) 885-0210
<b>Email:</b>	vandaltrack@hotmail.com

The 2012-13 season marks Wayne Phipps' third season as Idaho's Director of Track & Field/Cross Country and his 17th overall year with the program. He served as co-head coach from 2000-09 and was an assistant before that from 1995-99. In his time at Idaho, he has been honored nine times as a conference coach of the year and has led the Vandals to a record 11 total conference titles.

Since 2000, Phipps has overseen an Idaho track and field/cross country program that has produced four individual cross country champions, 46 indoor track and field champions and 103 outdoor champions. Vandals have claimed 18 conference athlete of the year awards, broken 15 conference records and qualified for the NCAA Championships 79 times. Since 2000, Vandal athletes have broken 30 indoor school records and 23 outdoor records, and at least one school record has fallen every year at Idaho during his tenure.

Additionally, Idaho has a very strong academic reputation as regular honorees among the U.S. Track & Field and Cross Country Coaches Association Division I All-Academic Teams in both men's and women's cross country and track and field. Since 2005, five Idaho track and field athletes have earned the Western Athletic Conference's prestigious Stan Bates Award as the top male or female student-athlete in the conference, and the team's athletes have been recognized with a combined 442 WAC All-Academic honors.

The 2011-12 season for Idaho featured a laundry list of team and individual accomplishments. Phipps' Vandals claimed the 2011 women's cross country crown - the team's second in a row and fourth in seven tries - and sophomore Hannah Kiser became the team's first individual NCAA Cross Country Championships qualifier since 2004. The Vandal men claimed Idaho's first men's WAC title in any sport with a dramatic win at the 2012 WAC Indoor Championships, then made it a sweep three months later on their home track at the WAC Outdoor Championships. In the 2012 track and field seasons alone, Vandals combined for three All-America honors, four school records, three WAC records, 21 individual WAC titles and three WAC relay titles, 88 men's All-WAC honors, 43 women's All-WAC accolades, 23 WAC Athlete of the Week awards and 97 WAC All-Academic honors.

Success is a staple under Phipps, and it began with his very first year at the position, when, in 2000, the Vandal men won the Big West title and Phipps was honored as 2000 Big West Men's Track and Field Coach of the Year. In 2001, both the men and women won Big West titles and Phipps was chosen Big West Men's Track and Field Coach of the Year once again. In each of his first three years at Idaho, the men's team finished in the top 30 in the nation both indoors and outdoors to make Idaho one of only nine schools in the nation to do so. Phipps' success wasn't limited to track and field, as he also led the Vandal women to a 2002 Big West Cross Country title and earned Big West Cross Country Coach of the Year honors. In 2003, the women's track and field team took home the Big West title.

Phipps led the Vandals to uncharted territory in 2004 when the women's cross country team qualified



for the NCAA Championships for the first time in the program's history and finished 25th overall. The 2005 cross country season saw even more success, as the women's team took home the University of Idaho's first Western Athletic Conference title. Four Vandal runners finished in the top five and Dee Olson earned the individual title, as well as WAC Athlete of the Year and Phipps earned his fourth career Coach of the Year honor. In 2006, the second straight Phipps-coached athlete won the WAC as freshman Rhea Richter took home the women's cross country individual title.

In 2007, Phipps led the women to their second cross country title in three years as four runners finished in the top 10. In 2008, he coached yet another WAC Champion, as Allix Lee-Painter won the women's cross country title and the women finished second as a team. In 2010, Idaho claimed its third WAC title in five years, as the team put five runners in the top 15 to claim the crown. Making that title especially sweet was the fact that it was held in Moscow, and was Idaho's first time hosting a WAC Championship event.

He currently coaches two-time Olympian and volunteer assistant coach Angela Whyte and has coached two-time Olympian and World Championship finalist Tawanda Chiwira, NCAA All-American and world-ranked hurdler Arend Watkins, and Olympian Sherwin James.

Phipps began his coaching career in his hometown of Prince George, British Columbia, with the Prince George Track and Field Club. During that time, he coached several provincial and national medalists and champions. As an athlete, Phipps was a three-year letterwinner in basketball and a four-year letterwinner in track and cross country at D.P. Todd Secondary. He also competed for the Prince George Track and Field Club, where he was coached by his father, Ron, and was a provincial champion and medalist in events ranging from the 100m to the 1500m and cross country. He also competed in both the cross country and track and field national championships in Canada.

Phipps competed for the University of Montana and the University of British Columbia, where he graduated with a degree in exercise science in 1991. Phipps earned his master's of science from the University of Oregon in exercise and movement science, with a sports medicine major and minors in biomechanics and exercise physiology.

#### **Team Conference Titles**

- 2000 Big West Men's Outdoor Track & Field
- 2001 Big West Men's Outdoor Track & Field
- 2001 Big West Women's Outdoor Track & Field
- 2002 Big West Women's Cross Country
- 2003 Big West Women's Outdoor Track & Field
- 2005 WAC Women's Cross Country
- 2007 WAC Women's Cross Country
- 2010 WAC Women's Cross Country
- 2011 WAC Women's Cross Country
- 2012 WAC Men's Indoor Track & Field
- 2012 WAC Men's Outdoor Track & Field

#### **Individual Coaching Honors**

- 2000 Big West Men's Track & Field Coach of the Year
- 2001 Big West Men's Track & Field Coach of the Year
- 2002 Big West Women's Cross Country Coach of the Year
- 2005 WAC Women's Cross Country Coach of the Year
- 2007 WAC Women's Cross Country Coach of the Year
- 2010 WAC Women's Cross Country Coach of the Year
- 2011 WAC Women's Cross Country Coach of the Year
- 2012 WAC Men's Indoor Track & Field Coach of the Year
- 2012 WAC Men's Outdoor Track & Field co-Coach of the Year

Show Menu





**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**UNIVERSITY OF IDAHO**

**SUBJECT**

Employment contract for extension for Women's Soccer Coach, Peter Showler

**REFERENCE**

August 20-22, 2008

Board approval of coaching contract

April 21-22, 2010

Board approval of coaching contract extension

June 23, 2011

Board approval of coaching contract extension

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures Section II.H.1.

**BACKGROUND/DISCUSSION**

The University of Idaho wishes to enter into a new contract with its Women's Soccer Coach, Peter Showler for a period of two years ending December 31, 2015. The primary terms of the agreement are set forth below, and the entire contract and redline comparison to the Board model contract are attached.

**IMPACT**

The annual base salary from appropriated funds is \$38,438.40; with eligibility to receive University-wide changes in employee compensation approved by the Director of Athletics and the President.

There is an annual media payment of \$12,300 and the following incentive/supplemental compensation provisions:

- Conference champions or co-champion = \$1,000
- Top 20 national ranking at season end = \$1,000
- Conference Coach or Co-Coach of the Year = \$1,000
- Team qualifies for conference tournament = \$2,000
- Team achieves a winning record at regular season end = \$500
- Team achieves 12 regular season wins = \$500
- Academic achievement and behavior of team (categorized by APR national rank):

National rank within sport

50th - 60th % = \$250

60th - 70th % = \$300

70th – 80th % = \$400

80th % or above = \$450

Coach may participate in University operated youth soccer camps and will be compensated with the net income from the camp less \$500 and all camp expenses – or if the University elects not to operate a camp, Coach may elect to do so.



**BUSINESS AFFAIRS AND HUMAN RESOURCES  
OCTOBER 18, 2012**

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Total potential annual compensation (base salary, media payment and incentive is \$57,188.40.

**ATTACHMENTS**

Attachment 1 – Employment Contract

Page 3

Attachment 2 – Comparison to Board Model Contract

Page 19

**STAFF COMMENTS AND RECOMMENDATIONS**

This is a request to extend the employment contract for UI's women's soccer coach for two more years. The annual base salary amount provided in this agreement is funded entirely with state appropriated General Funds.

The highest academic incentives are approximately equivalent to incentive pay for a winning team record. The contract contains adequate liquidated damages in favor of the University. The Board's model contract was used.

Staff recommends approval.

**BOARD ACTION**

I move to approve the request by the University of Idaho to enter a new employment contract with Peter Showler, as Women's Soccer Coach, for a term commencing January 1, 2013 and expiring on December 31, 2015 with an annual base salary of \$38,438.40 and such contingent base salary increases, annual media payments, and incentive/supplemental compensation provisions as set forth in the materials presented to the Board, in substantial conformance with the terms of the contract set forth in Attachment 1 to the Board materials.

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



## EMPLOYMENT AGREEMENT

This Employment Agreement (Agreement) is entered into by and between the University of Idaho (University), and Peter Showler (Coach).

### ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University shall employ Coach as the head coach of its intercollegiate women's soccer team (Team). Coach represents and warrants that Coach is fully qualified to serve, and is available for employment, in this capacity.

1.2. Reporting Relationship. Coach shall report and be responsible directly to the University's Director of Athletics (Director) or the Director's designee. Coach shall abide by the reasonable instructions of Director or the Director's designee and shall confer with the Director or the Director's designee on all administrative and technical matters. Coach shall also be under the general supervision of the University's President (President).

1.3. Duties. Coach shall manage and supervise the Team and shall perform such other duties in the University's athletic program as the Director may assign and as may be described elsewhere in this Agreement. The University shall have the right, at any time, to reassign Coach to duties at the University other than as head coach of the Team, provided that Coach's compensation and benefits shall not be affected by any such reassignment, except that the opportunity to earn supplemental compensation as provided in sections 3.2.1 through 3.2.7 shall cease.

### ARTICLE 2

2.1. Term. This Agreement is for a fixed-term appointment of three (3) years commencing on January 1, 2013, and terminating, without further notice to Coach, on December 31, 2015, unless sooner terminated in accordance with other provisions of this Agreement.

2.2. Extension or Renewal. This Agreement is renewable solely upon an offer from the University and an acceptance by Coach, both of which must be in writing and signed by the parties. Any renewal is subject to the prior approval of University's Board of Regents. This Agreement in no way grants to Coach a claim to tenure in employment, nor shall Coach's service pursuant to this agreement count in any way toward tenure at the University.



**ARTICLE 3**

**3.1 Regular Compensation.**

3.1.1 In consideration of Coach's services and satisfactory performance of this Agreement, the University shall provide to Coach:

- a) An annual salary of \$38,438.40 per year, payable in biweekly installments in accordance with normal University procedures. Coach will be eligible to receive University-wide changes in employee compensation approved by the Director and President;
- b) The opportunity to receive such employee benefits as the University provides generally to non-faculty exempt employees; and
- c) The opportunity to receive such employee benefits as the University's Department of Athletics (Department) provides generally to its employees of a comparable level. Coach hereby agrees to abide by the terms and conditions, as now existing or hereafter amended, of such employee benefits.

**3.2 Supplemental Compensation**

3.2.1. Each year the Team is the conference champion or co-champion and if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$1,000 during the fiscal year immediately following the year in which the championship is achieved. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.2. Each year Coach is named Conference Coach of the Year or Conference Co-Coach of the year, and if Coach continues to be employed as University's head women's soccer coach as of the ensuing July 1st, Coach shall receive supplemental compensation of \$1,000. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.3. Each year the Team finishes in the top 20 in the NCAA championships and if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$1,000. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.4. Each year the Team qualifies for play in the conference tournament, and if Coach continues to be employed as University's head coach of its



intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$2,000. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.5. Each year the Team achieves a winning record at the end of the regular season (excluding any exhibition and conference tournament games), and if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$500. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.6. Each year the Team achieves twelve (12) wins in regular season games (excluding exhibition games), and if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$500. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.7. Each year Coach shall be eligible to receive supplemental compensation based on the academic achievement and behavior of Team members if the Team's cumulative APR ranks nationally within intercollegiate women's soccer at the 50th percentile or higher as follows:

National rank within sport  
50th - 60th % = \$250  
60th - 70th % = \$300  
70th - 80th % = \$400  
80th % or above = \$450

Any such supplemental compensation paid to Coach shall be accompanied with a justification for the supplemental compensation based on the factors listed above, and such justification shall be separately reported to the Board of Regents as a document available to the public under the Idaho Public Records Act.

3.2.8 The Coach shall receive the sum of \$12,300 from the University or the University's designated media outlet(s) or a combination thereof each year during the term of this Agreement in compensation for participation in media programs and public appearances (Programs). Each year, one-half of this sum shall be paid prior to the first contest, and one-half shall be paid no later than two weeks after the last contest. Coach's right to receive the second half of such payment shall vest on the date of the Team's last regular season or post-season competition, whichever occurs later, provided Coach has fully participated in media programs and public appearances through that date. Coach's right to receive any such media payment under this Paragraph is expressly contingent upon the following: (1) academic achievement and behavior of Team members; (2) appropriate behavior by, and supervision of, all assistant coaches, as determined by the Director; and (3) Coach's compliance with University's financial stewardship policies as



set forth in University's Administrative Procedures Manual Chapter 25. Agreements requiring the Coach to participate in Programs related to his duties as an employee of University are the property of the University. The University shall have the exclusive right to negotiate and contract with all producers of media productions and all parties desiring public appearances by the Coach. Coach agrees to cooperate with the University in order for the Programs to be successful and agrees to provide his services to and perform on the Programs and to cooperate in their production, broadcasting, and telecasting. It is understood that neither Coach nor any assistant coaches shall appear without the prior written approval of the Director on any competing radio or television program (including but not limited to a coach's show, call-in show, or interview show) or a regularly scheduled news segment, except that this prohibition shall not apply to routine news media interviews for which no compensation is received. Without the prior written approval of the Director, Coach shall not appear in any commercial endorsements that are broadcast on radio or television that conflict with those broadcast on the University's designated media outlets.

3.2.9 Coach agrees that the University has the exclusive right to operate youth soccer camps on its campus using University facilities. The University shall allow Coach the opportunity to earn supplemental compensation by assisting with the University's camps in Coach's capacity as a University employee. Coach hereby agrees to assist in the marketing, supervision, and general administration of the University's youth soccer camps. Coach also agrees that Coach will perform all obligations mutually agreed upon by the parties. In exchange for Coach's participation in the University's youth soccer camps, the University shall pay Coach the remaining income from the youth soccer camps, less \$500, after all claims, insurance, and expenses of such camps have been paid.

Alternatively, in the event the University notifies Coach, in writing that it does not intend to operate youth soccer camps for a particular period of time during the term of this Agreement, then, during such time period, Coach shall be permitted to operate youth soccer camps on the University's campus and using its facilities under the following terms and conditions:

:

- a) The summer youth camp operation reflects positively on the University of Idaho and the Department;
- b) The summer youth camp is operated by Coach directly or through a private enterprise owned and managed by Coach. The Coach shall not use University of Idaho personnel, equipment, or facilities without the prior written approval of the Director;
- c) Assistant coaches at the University of Idaho are given priority when the Coach or the private enterprise selects coaches to participate;



- d) The Coach complies with all NCAA, Conference, and University of Idaho rules and regulations related, directly or indirectly, to the operation of summer youth camps;
- e) The Coach or the private enterprise enters into a contract with University of Idaho and Sodexo for all campus goods and services required by the camp.
- f) The Coach or private enterprise pays for use of University of Idaho facilities; such rate to be set at the rate charged as if the camp were conducted by the University of Idaho.
- g) Within thirty days of the last day of the summer youth camp(s), Coach shall submit to the Director a preliminary "Camp Summary Sheet" containing financial and other information related to the operation of the camp. Within ninety days of the last day of the summer youth camp(s), Coach shall submit to Director a final accounting and "Camp Summary Sheet." A copy of the "Camp Summary Sheet" is attached to this Agreement as an exhibit.
- h) The Coach or the private enterprise shall provide proof of liability insurance as follows: (1) liability coverage: spectator and staff--\$1 million; (2) catastrophic coverage: camper and staff--\$1 million maximum coverage with \$100 deductible.
- i) To the extent permitted by law, the Coach or the private enterprise shall defend and indemnify the University of Idaho against any claims, damages, or liabilities arising out of the operation of the summer youth camp(s).
- j) All employees of the summer youth camp(s) shall be employees of the Coach or the private enterprise and not the University of Idaho while engaged in camp activities. The Coach and all other University of Idaho employees involved in the operation of the camp(s) shall be on annual leave status or leave without pay during the days the camp is in operation. The Coach or private enterprise shall provide workers' compensation insurance in accordance with Idaho law and comply in all respects with all federal and state wage and hour laws.

In the event of termination of this Agreement, suspension, or reassignment, University of Idaho shall not be under any obligation to permit a summer youth



camp to be held by the Coach after the effective date of such termination, suspension, or reassignment, and the University of Idaho shall be released from all obligations relating thereto.

3.2.10 Coach agrees that the University has the exclusive right to select footwear, apparel and/or equipment for the use of its student-athletes and staff, including Coach, during official practices and games and during times when Coach or the Team is being filmed by motion picture or video camera or posing for photographs in their capacity as representatives of University. Coach recognizes that the University is negotiating or has entered into an agreement with Nike to supply the University with athletic footwear, apparel and/or equipment. Coach agrees that, upon the University's reasonable request, Coach will consult with appropriate parties concerning Nike products' design or performance, shall act as an instructor at a clinic sponsored in whole or in part by Nike, or give a lecture at an event sponsored in whole or in part by Nike, or make other educationally-related appearances as may be reasonably requested by the University. Notwithstanding the foregoing sentence, Coach shall retain the right to decline such appearances as Coach reasonably determines to conflict with or hinder his duties and obligations as head women's soccer coach. In order to avoid entering into an agreement with a competitor of Nike, Coach shall submit all outside consulting agreements to the University for review and approval prior to execution. Coach shall also report such outside income to the University in accordance with NCAA rules. Coach further agrees that Coach will not endorse any athletic footwear, apparel and/or equipment products, including Nike, and will not participate in any messages or promotional appearances which contain a comparative or qualitative description of athletic footwear, apparel or equipment products.

3.3 General Conditions of Compensation. All compensation provided by the University to Coach is subject to deductions and withholdings as required by law or the terms and conditions of any fringe benefit in which Coach participates. However, if any fringe benefit is based in whole or in part upon the compensation provided by the University to Coach, such fringe benefit shall be based only on the compensation provided pursuant to section 3.1.1, except to the extent required by the terms and conditions of a specific fringe benefit program.

#### ARTICLE 4

4.1. Coach's Specific Duties and Responsibilities. In consideration of the compensation specified in this Agreement, Coach, in addition to the obligations set forth elsewhere in this Agreement, shall:

4.1.1. Devote Coach's full time and best efforts to the performance of Coach's duties under this Agreement;

4.1.2. Develop and implement programs and procedures with respect to the evaluation, recruitment, training, and coaching of Team members which enable them to compete successfully and reasonably protect their health, safety, and well-being;



4.1.3. Observe and uphold all academic standards, requirements, and policies of the University and encourage Team members to perform to their highest academic potential and to graduate in a timely manner; and

4.1.4. Know, recognize, and comply with all applicable laws and the policies, rules and regulations of the University, the University's governing board, the conference, and the NCAA; supervise and take appropriate steps to ensure that Coach's assistant coaches, any other employees for whom Coach is administratively responsible, and the members of the Team know, recognize, and comply with all such laws, policies, rules and regulations; and immediately report to the Director and to the Department's Director of Compliance if Coach has reasonable cause to believe that any person or entity, including without limitation representatives of the University's athletic interests, has violated or is likely to violate any such laws, policies, rules or regulations. Coach shall cooperate fully with the University and Department at all times. The names or titles of employees whom Coach supervises are attached as Exhibit C. The applicable laws, policies, rules, and regulations include: (a) State Board of Education and Board of Regents of the University of Idaho Governing Policies and Procedures and Rule Manual; (b) University's Handbook; (c) University's Administrative Procedures Manual; (d) the policies of the Department; (e) NCAA rules and regulations; and (f) the rules and regulations of the soccer conference of which the University is a member.

Outside Activities. Coach shall not undertake any business, professional or personal activities, or pursuits that would prevent Coach from devoting Coach's full time and best efforts to the performance of Coach's duties under this Agreement, that would otherwise detract from those duties in any manner, or that, in the opinion of the University, would reflect adversely upon the University or its athletic program. Subject to the terms and conditions of this Agreement, Coach may, with the prior written approval of the Director, who may consult with the President, enter into separate arrangements for outside activities and endorsements which are consistent with Coach's obligations under this Agreement. Coach may not use the University's name, logos, or trademarks in connection with any such arrangements without the prior written approval of the Director and the President.

4.3 NCAA Rules. In accordance with NCAA rules, Coach shall obtain prior written approval from the University's President for all athletically related income and benefits from sources outside the University and shall provide a written detailed account of the source and amount of all such income and benefits to the University's President whenever reasonably requested, but in no event less than annually before the close of business on June 30th of each year or the last regular University work day preceding June 30th. The report shall be in a format reasonably satisfactory to University. Sources of such income include, but are not limited to, the following:

- (a) Income from annuities;
- (b) Sports camps;
- (c) Housing benefits, including preferential housing arrangements;
- (d) Country club memberships;



- (e) Complimentary ticket sales;
- (f) Television and radio programs; and
- (g) Endorsement or consultation contracts with athletics shoe, apparel or equipment manufacturers.

In no event shall Coach accept or receive directly or indirectly any monies, benefits, or gratuities whatsoever from any person, association, corporation, University booster club, University alumni association, University foundation, or other benefactor, if the acceptance or receipt of the monies, benefits, or gratuities would violate applicable law or the policies, rules, and regulations of the University, the University's governing board, the conference, or the NCAA.

4.4 Hiring Authority. Coach shall have the responsibility and the sole authority to recommend to the Director the hiring and termination of assistant coaches for the Team, but the decision to hire or terminate an assistant coach shall be made by the Director and shall, when necessary or appropriate, be subject to the approval of President and the University's Board of Regents.

4.5 Scheduling. Coach shall consult with, and may make recommendations to, the Director or the Director's designee with respect to the scheduling of Team competitions, but the final decision shall be made by the Director or the Director's designee.

4.6 Other Coaching Opportunities. Coach shall not, under any circumstances, interview for, negotiate for, or accept employment as a coach at any other institution of higher education or with any professional sports team, requiring performance of duties prior to the expiration of this Agreement, without the prior approval of the Director. Such approval shall not be unreasonably withheld.

## ARTICLE 5

5.1 Termination of Coach for Cause. The University may, in its discretion, suspend Coach from some or all of Coach's duties, temporarily or permanently, and with or without pay; reassign Coach to other duties; or terminate this Agreement at any time for good or adequate cause, as those terms are defined in applicable rules and regulations.

5.1.1 In addition to the definitions contained in applicable rules and regulations, University and Coach hereby specifically agree that the following shall constitute good or adequate cause for suspension, reassignment, or termination of this Agreement:

- a) A deliberate or major violation of Coach's duties under this agreement or the refusal or unwillingness of Coach to perform such duties in good faith and to the best of Coach's abilities;
- b) The failure of Coach to remedy any violation of any of the terms of this agreement within 30 days after written notice from the University;



- c) A deliberate or major violation by Coach of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference or the NCAA, including but not limited to any such violation which may have occurred during the employment of Coach at another NCAA or NAIA member institution;
- d) Ten (10) working days' absence of Coach from duty without the University's consent;
- e) Any conduct of Coach that constitutes moral turpitude or that would, in the University's judgment, reflect adversely on the University or its athletic programs;
- f) The failure of Coach to represent the University and its athletic programs positively in public and private forums;
- g) The failure of Coach to fully and promptly cooperate with the NCAA or the University in any investigation of possible violations of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference, or the NCAA;
- h) The failure of Coach to report a known violation of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference, or the NCAA, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team; or
- i) A violation of any applicable law or the policies, rules or regulations of the University, the University's governing board, the conference, or the NCAA, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team if Coach knew or should have known of the violation and could have prevented it by ordinary supervision.

5.1.2 Suspension, reassignment, or termination for good or adequate cause shall be effectuated by the University as follows: before the effective date of the suspension, reassignment, or termination, the Director or his or her designee shall provide Coach with notice, which notice shall be accomplished in the manner provided for in this Agreement and shall include the reason(s) for the contemplated action. Coach shall then have an opportunity to respond. After Coach responds or fails to respond, University shall notify Coach whether, and if so when, the action will be effective.



5.1.3 In the event of any termination for good or adequate cause, the University's obligation to provide compensation and benefits to Coach, whether direct, indirect, supplemental or collateral, shall cease as of the date of such termination, and the University shall not be liable for the loss of any collateral business opportunities or other benefits, perquisites, or income resulting from outside activities or from any other sources.

5.1.4 If found in violation of NCAA regulations, Coach shall, in addition to the provisions of Section 5.1, be subject to disciplinary or corrective action as set forth in the provisions of the NCAA enforcement procedures, including suspension without pay or termination of employment for significant or repetitive violations. This section applies to violations occurring at the University or at previous institutions at which the Coach was employed.

5.2 Termination of Coach for Convenience of University.

5.2.1 At any time after commencement of this Agreement, University, for its own convenience, may terminate this Agreement by giving ten (10) days prior written notice to Coach.

5.2.2 In the event that University terminates this Agreement for its own convenience, University shall pay to Coach the salary set forth in section 3.1.1(a), excluding all deductions required by law, on the regular paydays of University until the term of this Agreement ends, provided however, in the event Coach obtains other employment of any kind or nature after such termination, then the amount of compensation University pays will be adjusted and reduced by the amount of compensation paid Coach as a result of such other employment, such adjusted compensation to be calculated for each University pay-period by reducing the gross salary set forth in section 3.1.1(a) (before deductions required by law) by the gross compensation paid to Coach under the other employment, then subtracting from this adjusted gross compensation deductions according to law. In addition, Coach will be entitled to continue his health insurance plan and group life insurance as if he remained a University employee until the term of this Agreement ends or until Coach obtains reasonably comparable employment or any other employment providing Coach with a reasonably comparable health plan and group life insurance, whichever occurs first. Coach shall be entitled to no other compensation or fringe benefits, except as otherwise provided herein or required by law. Coach specifically agrees to inform University within ten business days of obtaining other employment and to advise University of all relevant terms of such employment, including without limitation the nature and location of the employment, salary, other compensation, health insurance benefits, life insurance benefits, and other fringe benefits. Failure to so inform and advise University shall constitute a material breach of this Agreement and University's obligation to pay compensation under this provision shall end. Coach further agrees to repay to University all compensation paid to him by University after the date he obtains other employment, to which he is not entitled under this provision.



5.2.3 University has been represented by legal counsel, and Coach has either been represented by legal counsel or has chosen to proceed without legal counsel, in the contract negotiations. The parties have bargained for and agreed to the foregoing provision, giving consideration to the fact that the Coach may lose certain benefits, supplemental compensation, or outside compensation relating to his employment with University that are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by University and the acceptance thereof by Coach shall constitute adequate and reasonable compensation to Coach for the damages and injury suffered by Coach because of such termination by University. The liquidated damages are not, and shall not be construed to be, a penalty.

### 5.3 Termination by Coach for Convenience.

5.3.1 The Coach recognizes that his promise to work for University for the entire term of this Agreement is of the essence of this Agreement. The Coach also recognizes that the University is making a highly valuable investment in his employment by entering into this Agreement and that its investment would be lost were he to resign or otherwise terminate his employment with the University before the end of the contract term.

5.3.2 The Coach, for his own convenience, may terminate this Agreement during its term by giving prior written notice to the University. Termination shall be effective ten (10) days after notice is given to the University.

5.3.3 If the Coach terminates this Agreement for convenience at any time, all obligations of the University shall cease as of the effective date of the termination. If the Coach terminates this Agreement for his convenience he shall pay to the University the following sums: (a) if the Agreement is terminated on or before December 31, 2013, the sum of \$10,000; (b) if the Agreement is terminated between January 1, 2014 and December 31, 2014 inclusive, the sum of \$5,000; (c) if the Agreement is terminated between January 1, 2015 and December 31, 2015 inclusive, there will be no buyout payment. Sums shall be due and payable within twenty (20) days of the effective date of the termination, and any unpaid amount shall bear simple interest at a rate eight (8) percent per annum until paid.

5.3.4 University has been represented by legal counsel, and Coach has either been represented by legal counsel or has chosen to proceed without legal counsel in the contract negotiations. The parties have bargained for and agreed to the foregoing provision, giving consideration to the fact that the University will incur administrative and recruiting costs in obtaining a replacement for Coach, in addition to potentially increased compensation costs if Coach terminates this Agreement for convenience that are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by Coach and the acceptance thereof by University shall constitute adequate and reasonable compensation to University for the damages and injury suffered by it because of such termination by Coach. The liquidated damages are



not, and shall not be construed to be, a penalty. This section 5.3.4 shall not apply if Coach terminates this Agreement because of a material breach by the University.

5.3.5. Except as provided elsewhere in this Agreement, if Coach terminates this Agreement for convenience, he shall forfeit to the extent permitted by law his right to receive all supplemental compensation and other payments.

5.4 Termination due to Disability or Death of Coach.

5.4.1 Notwithstanding any other provision of this Agreement, this Agreement shall terminate automatically if Coach becomes totally or permanently disabled as defined by the University's disability insurance carrier, becomes unable to perform the essential functions of the position of head coach, or dies.

5.4.2 If this Agreement is terminated because of Coach's death, Coach's salary and all other benefits shall terminate as of the last day worked, except that the Coach's personal representative or other designated beneficiary shall be paid all compensation due or unpaid and death benefits, if any, as may be contained in any fringe benefit plan now in force or hereafter adopted by the University and due to the Coach's estate or beneficiaries thereunder.

5.4.3 If this Agreement is terminated because the Coach becomes totally or permanently disabled as defined by the University's disability insurance carrier, or becomes unable to perform the essential functions of the position of head coach, all salary and other benefits shall terminate, except that the Coach shall be entitled to receive any compensation due or unpaid and any disability-related benefits to which he is entitled by virtue of employment with the University.

5.5 Interference by Coach. In the event of termination, suspension, or reassignment, Coach agrees that Coach will not interfere with the University's student-athletes or otherwise obstruct the University's ability to transact business or operate its intercollegiate athletics program.

5.6 No Liability. The University shall not be liable to Coach for the loss of any collateral business opportunities or any other benefits, perquisites or income from any sources that may ensue as a result of any termination of this Agreement by either party or due to death or disability or the suspension or reassignment of Coach, regardless of the circumstances.

5.7 Waiver of Rights. Because the Coach is receiving a multi-year contract and the opportunity to receive supplemental compensation and because such contracts and opportunities are not customarily afforded to University employees, if the University suspends or reassigns Coach, or terminates this Agreement for good or adequate cause or for convenience, Coach shall have all the rights provided for in this Agreement but hereby releases the University from compliance with the notice, appeal, and similar employment-related rights provide for in the State Board of Education and Board or



Regents of the University of Idaho Rule Manual (IDAPA 08) and Governing Policies and Procedures Manual, and the University Faculty-Staff Handbook.

## ARTICLE 6

6.1 Board Approval. This Agreement shall not be effective until and unless approved of the University's Board of Regents and executed by both parties as set forth below. In addition, the payment of any compensation pursuant to this agreement shall be subject to the approval of the University's Board of Regents, the President, and the Director; the sufficiency of legislative appropriations; the receipt of sufficient funds in the account from which such compensation is paid; and the Board of Regents and University's rules regarding financial exigency.

6.2 University Property. All personal property (excluding vehicle(s) provided through the Vandal Wheels program), material, and articles of information, including, without limitation, keys, credit cards, personnel records, recruiting records, team information, films, statistics or any other personal property, material, or data, furnished to Coach by the University or developed by Coach on behalf of the University or at the University's direction or for the University's use or otherwise in connection with Coach's employment hereunder are and shall remain the sole property of the University. Within twenty-four (24) hours of the expiration of the term of this agreement or its earlier termination as provided herein, Coach shall immediately cause any such personal property, materials, and articles of information in Coach's possession or control to be delivered to the Director.

6.3 Assignment. Neither party may assign its rights or delegate its obligations under this Agreement without the prior written consent of the other party.

6.4 Waiver. No waiver of any default in the performance of this Agreement shall be effective unless in writing and signed by the waiving party. The waiver of a particular breach in the performance of this Agreement shall not constitute a waiver of any other or subsequent breach. The resort to a particular remedy upon a breach shall not constitute a waiver of any other available remedies.

6.5 Severability. If any provision of this Agreement is determined to be invalid or unenforceable, the remainder of the Agreement shall not be affected and shall remain in effect.

6.6 Governing Law. This Agreement shall be subject to and construed in accordance with the laws of the state of Idaho as an agreement to be performed in Idaho. Any action based in whole or in part on this Agreement shall be brought in the courts of the state of Idaho.

6.7 Oral Promises. Oral promises of an increase in annual salary or of any supplemental or other compensation shall not be binding upon the University.



6.8 Force Majeure. Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes therefor, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the reasonable control of the party obligated to perform (including financial inability), shall excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

6.9 Confidentiality. The Coach hereby consents and agrees that this document may be released and made available to the public after it is signed by the Coach. The Coach further agrees that all documents and reports he is required to produce under this Agreement may be released and made available to the public at the University's sole discretion.

6.10 Notices. Any notice under this Agreement shall be in writing and be delivered in person or by public or private courier service (including U.S. Postal Service Express Mail) or certified mail with return receipt requested or by facsimile. All notices shall be addressed to the parties at the following addresses or at such other addresses as the parties may from time to time direct in writing:

the University:                      Director of Athletics  
University of Idaho  
P.O. Box 442302  
Moscow, Idaho 83844-2302

with a copy to:                      President  
University of Idaho  
P.O. Box 443151  
Moscow, ID 83844-3151

the Coach:                              Peter Showler  
Last known address on file with  
University's Human Resource Services

Any notice shall be deemed to have been given on the earlier of: (a) actual delivery or refusal to accept delivery, (b) the date of mailing by certified mail, or (c) the day facsimile delivery is verified. Actual notice, however and from whomever received, shall always be effective.

6.11 Headings. The headings contained in this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation hereof.



6.12 Binding Effect. This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties and their respective heirs, legal representatives, successors and assigns.

6.13 Non-Use of Names and Trademarks. The Coach shall not, without the University's prior written consent in each case, use any name, trade name, trademark, or other designation of the University (including contraction, abbreviation or simulation), except in the course and scope of his official University duties.

6.14 No Third Party Beneficiaries. There are no intended or unintended third party beneficiaries to this Agreement.

6.15 Entire Agreement; Amendments. This Agreement constitutes the entire agreement of the parties and supersedes all prior agreements and understandings with respect to the same subject matter. No amendment or modification of this Agreement shall be effective unless in writing, signed by both parties, and approved by University's Board of Regents.

6.16 Opportunity to Consult with Attorney. The Coach acknowledges that he has had the opportunity to consult and review this Agreement with an attorney and has either consulted with legal counsel or chosen not to. Accordingly, in all cases, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any party.

UNIVERSITY

COACH

\_\_\_\_\_  
M. Duane Nellis                      Date  
President

\_\_\_\_\_  
Peter Showler,                      Date

Approved by the Board of Regents on the \_\_\_\_ day of \_\_\_\_\_, 2012.



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~~(MODEL ATHLETICS CONTRACT)~~ EMPLOYMENT AGREEMENT

This Employment Agreement (Agreement) is entered into by and between  
~~\_\_\_\_\_~~ ~~(the University (College) of Idaho (University))~~, and  
~~\_\_\_\_\_~~ Peter Showler (Coach).

## ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University ~~(College)~~ shall employ Coach as the head coach of its intercollegiate ~~(Sport)~~ women's soccer team (Team). Coach represents and warrants that Coach is fully qualified to serve, and is available for employment, in this capacity.

1.2. Reporting Relationship. Coach shall report and be responsible directly to the University ~~(College)~~'s Director of Athletics (Director) or the Director's designee. Coach shall abide by the reasonable instructions of Director or the Director's designee and shall confer with the Director or the Director's designee on all administrative and technical matters. Coach shall also be under the general supervision of the University ~~(College)~~'s President (President).

1.3. Duties. Coach shall manage and supervise the Team and shall perform such other duties in the University ~~(College)~~'s athletic program as the Director may assign and as may be described elsewhere in this Agreement. The University ~~(College)~~ shall have the right, at any time, to reassign Coach to duties at the University ~~(College)~~ other than as head coach of the Team, provided that Coach's compensation and benefits shall not be affected by any such reassignment, except that the opportunity to earn supplemental compensation as provided in sections 3.2.1 through ~~(Depending on supplemental pay provisions used)~~ 3.2.7 shall cease.

## ARTICLE 2

2.1. Term. This Agreement is for a fixed-term appointment of ~~\_\_\_\_\_~~ three (~~—~~ 3) years, commencing on ~~\_\_\_\_\_~~ January 1, 2013, and terminating, without further notice to Coach, on ~~\_\_\_\_\_~~ December 31, 2015, unless sooner terminated in accordance with other provisions of this Agreement.

2.2. Extension or Renewal. This Agreement is renewable solely upon an offer from the University ~~(College)~~ and an acceptance by Coach, both of which must be in writing and signed by the parties. Any renewal is subject to the prior approval of University ~~(College)~~'s Board of ~~(Regents or Trustees)~~. This Agreement in no way grants to Coach a claim to tenure in employment, nor shall Coach's service pursuant to this agreement count in any way toward tenure at the University ~~(College)~~.



## ARTICLE 3

3.1 Regular Compensation.

3.1.1 In consideration of Coach's services and satisfactory performance of this Agreement, the University ~~(College)~~ shall provide to Coach:

- a) An annual salary of \$~~\_\_\_\_\_~~38,438.40 per year, payable in biweekly installments in accordance with normal University ~~(College) procedures, and such salary increases as may be determined appropriate~~procedures. Coach will be eligible to receive University-wide changes in employee compensation approved by the Director and President ~~and approved by the University (College)'s Board of (Regents or Trustees)\_\_\_\_\_~~;
- b) The opportunity to receive such employee benefits as the University ~~(College)~~ provides generally to non-faculty exempt employees; and
- c) The opportunity to receive such employee benefits as the University ~~(College)~~'s Department of Athletics (Department) provides generally to its employees of a comparable level. Coach hereby agrees to abide by the terms and conditions, as now existing or hereafter amended, of such employee benefits.

3.2 Supplemental Compensation

3.2.1. Each year the Team is the conference champion or co-champion and ~~also becomes eligible for a (bowl game pursuant to NCAA Division I guidelines or post season tournament or post season playoffs)~~ if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$1,000 during the fiscal year immediately following the year in which the championship is achieved. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.2. Each year Coach is named Conference Coach of the Year or Conference Co-Coach of the year, and if Coach continues to be employed as University ~~(College)~~'s head ~~\_\_\_\_\_ (Sport) women's soccer~~ coach as of the ensuing July 1st, ~~the University (College) Coach shall pay to Coach~~receive supplemental compensation ~~in an amount equal to \_\_\_\_\_ (amount or computation) of Coach's Annual Salary during the fiscal year in which the championship and (bowl or other post season) eligibility are achieved of \$1,000.~~ The University ~~(College)~~ shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

~~Model Contract version: 12/9/2010~~Employment Agreement Showler

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3.2.3. ~~3.2.2~~ Each year the Team ~~is ranked in the top 25 in the (national rankings, such as final ESPN/USA Today coaches poll of Division IA football teams) — finishes in the top 20 in the NCAA championships~~ and if Coach continues to be employed as University ~~(College)~~'s head ~~—(Sport)—~~ coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University ~~(College)~~ shall pay to Coach supplemental compensation ~~in an amount equal to (amount or computation) — of Coach's Annual Salary in effect on the date of the final poll. of \$1,000.~~ The University ~~(College)~~ shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.4. Each year the Team qualifies for play in the conference tournament, and if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$2,000. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.5. Each year the Team achieves a winning record at the end of the regular season (excluding any exhibition and conference tournament games), and if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$500. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.6. Each year the Team achieves twelve (12) wins in regular season games (excluding exhibition games), and if Coach continues to be employed as University's head coach of its intercollegiate women's soccer team as of the ensuing July 1st, the University shall pay to Coach supplemental compensation of \$500. The University shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.

3.2.7. Each year Coach shall be eligible to receive supplemental compensation based on the academic achievement and behavior of Team members if the Team's cumulative APR ranks nationally within intercollegiate women's soccer at the 50th percentile or higher as follows:

National rank within sport  
50th - 60th % = \$250  
60th - 70th % = \$300  
70th - 80th % = \$400  
80th % or above = \$450

~~3.2.3~~ Each year Coach shall be eligible to receive supplemental compensation in an amount up to (amount or computation) — based on the academic achievement and behavior of Team members. The determination of whether



~~Coach will receive such supplemental compensation and the timing of the payment(s) shall be at the discretion of the President in consultation with the Director and approved by the University (College)'s Board of (Regents or Trustees). The determination shall be based on the following factors: grade point averages; difficulty of major course of study; honors such as scholarships, designation as Academic All American, and conference academic recognition; progress toward graduation for all athletes, but particularly those who entered the University (College) as academically at-risk students; the conduct of Team members on the University (College) campus, at authorized University (College) activities, in the community, and elsewhere.~~ Any such supplemental compensation paid to Coach shall be accompanied with a ~~detailed~~ justification for the supplemental compensation based on the factors listed above, and such justification shall be separately reported to the Board of ~~(Regents or Trustees)~~ as a document available to the public under the Idaho Public Records Act.

~~3.2.4 Each year Coach shall be eligible to receive supplemental compensation in an amount up to (amount or computation) based on the overall development of the intercollegiate (men's/women's) (Sport) program; ticket sales; fundraising; outreach by Coach to various constituency groups, including University (College) students, staff, faculty, alumni and boosters; and any other factors the President wishes to consider. The determination of whether Coach will receive such supplemental compensation and the timing of the payment(s) shall be at the discretion of the President in consultation with the Director and approved by the University (College)'s Board of (Regents or Trustees).~~

~~3.2.5~~ 3.2.8 The Coach shall receive the sum of ~~(amount or computation)~~ \$12,300 from the University ~~(College)~~ or the University ~~(College)~~'s designated media outlet(s) or a combination thereof each year during the term of this Agreement in compensation for participation in media programs and public appearances (Programs). ~~Coach~~ Each year, one-half of this sum shall be paid prior to the first contest, and one-half shall be paid no later than two weeks after the last contest. Coach's right to receive the second half of such a payment shall vest on the date of the Team's last regular season or post-season competition, whichever occurs later. This sum shall be paid (terms or conditions of payment) provided Coach has fully participated in media programs and public appearances through that date. Coach's right to receive any such media payment under this Paragraph is expressly contingent upon the following: (1) academic achievement and behavior of Team members; (2) appropriate behavior by, and supervision of, all assistant coaches, as determined by the Director; and (3) Coach's compliance with University's financial stewardship policies as set forth in University's Administrative Procedures Manual Chapter 25. Agreements requiring the Coach to participate in Programs related to his duties as an employee of University ~~(College)~~ are the property of the University ~~(College)~~. The University ~~(College)~~ shall have the exclusive right to negotiate and contract with all producers of media productions and all parties desiring public appearances by the Coach. Coach agrees to cooperate with the University ~~(College)~~ in order for the Programs to be successful and agrees to provide his services to and perform on the Programs and to cooperate in their production, broadcasting, and telecasting. It is understood that neither Coach nor any assistant



coaches shall appear without the prior written approval of the Director on any competing radio or television program (including but not limited to a coach's show, call-in show, or interview show) or a regularly scheduled news segment, except that this prohibition shall not apply to routine news media interviews for which no compensation is received.

Without the prior written approval of the Director, Coach shall not appear in any commercial endorsements ~~which~~that are broadcast on radio or television that conflict with those broadcast on the University ~~(College)~~'s designated media outlets.

~~3.2.6 (SUMMER CAMP OPERATED BY UNIVERSITY (COLLEGE))~~3.2.9 Coach agrees that the University ~~(College)~~ has the exclusive right to operate youth ~~(Sport) — soccer~~ camps on its campus using University ~~(College)~~ facilities. The University ~~(College)~~ shall allow Coach the opportunity to earn supplemental compensation by assisting with the University ~~(College)~~'s camps in Coach's capacity as a University ~~(College)~~ employee. Coach hereby agrees to assist in the marketing, supervision, and general administration of the University ~~(College)~~'s football's youth soccer camps. Coach also agrees that Coach will perform all obligations mutually agreed upon by the parties. In exchange for Coach's participation in the University ~~(College)~~'s summer football's youth soccer camps, the University ~~(College)~~ shall pay Coach ~~—(amount)— per year as supplemental compensation during each year of his employment as head (Sport) coach at the University (College). This amount shall be paid —(terms of payment) — the remaining income from the youth soccer camps, less \$500, after all claims, insurance, and expenses of such camps have been paid.~~

~~(SUMMER CAMP OPERATED BY COACH) — Coach may~~Alternatively, in the event the University notifies Coach, in writing that it does not intend to operate youth soccer camps for a particular period of time during the term of this Agreement, then, during such time period, Coach shall be permitted to operate a summer youth (Sport) — camp at soccer camps on the University (College)'s campus and using its facilities under the following terms and conditions:

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- a) The summer youth camp operation reflects positively on the University ~~(College)~~of Idaho and the Department;
- b) The summer youth camp is operated by Coach directly or through a private enterprise owned and managed by Coach. The Coach shall not use University ~~(College)~~of Idaho personnel, equipment, or facilities without the prior written approval of the Director;
- c) Assistant coaches at the University ~~(College)~~of Idaho are given priority when the Coach or the private enterprise selects coaches to participate;
- d) The Coach complies with all NCAA ~~(NAIA)~~, Conference, and University ~~(College)~~of Idaho rules and



regulations related, directly or indirectly, to the operation of summer youth camps;

- e) The Coach or the private enterprise enters into a contract with University ~~(College)~~ and ~~(campus-concessionaire)~~ of Idaho and Sodexo for all campus goods and services required by the camp.
- f) The Coach or private enterprise pays for use of University ~~(College)~~ facilities including the ~~\_\_\_\_\_~~ of Idaho facilities; such rate to be set at the rate charged as if the camp were conducted by the University of Idaho.
- g) Within thirty days of the last day of the summer youth camp(s), Coach shall submit to the Director a preliminary "Camp Summary Sheet" containing financial and other information related to the operation of the camp. Within ninety days of the last day of the summer youth camp(s), Coach shall submit to Director a final accounting and "Camp Summary Sheet." A copy of the "Camp Summary Sheet" is attached to this Agreement as an exhibit.
- h) The Coach or the private enterprise shall provide proof of liability insurance as follows: (1) liability coverage: spectator and staff--\$1 million; (2) catastrophic coverage: camper and staff--\$1 million maximum coverage with \$100 deductible.
- i) To the extent permitted by law, the Coach or the private enterprise shall defend and indemnify the University ~~(College)~~ of Idaho against any claims, damages, or liabilities arising out of the operation of the summer youth camp(s).
- j) All employees of the summer youth camp(s) shall be employees of the Coach or the private enterprise and not the University ~~(College)~~ of Idaho while engaged in camp activities. The Coach and all other University ~~(College)~~ of Idaho employees involved in the operation of the camp(s) shall be on annual leave status or leave without pay during the days the camp is in operation. The Coach or private enterprise shall provide workers' compensation insurance in accordance with Idaho law and comply in all respects with all federal and state wage and hour laws.



In the event of termination of this Agreement, suspension, or reassignment, University ~~(College)~~ of Idaho shall not be under any obligation to permit a summer youth camp to be held by the Coach after the effective date of such termination, suspension, or reassignment, and the University ~~(College)~~ of Idaho shall be released from all obligations relating thereto.

~~3.2.7~~3.2.10 Coach agrees that the University ~~(College)~~ has the exclusive right to select footwear, apparel and/or equipment for the use of its student-athletes and staff, including Coach, during official practices and games and during times when Coach or the Team is being filmed by motion picture or video camera or posing for photographs in their capacity as representatives of University ~~(College)~~. Coach recognizes that the University ~~(College)~~ is negotiating or has entered into an agreement with ~~—(Company Name)—~~ Nike to supply the University ~~(College)~~ with athletic footwear, apparel and/or equipment. Coach agrees that, upon the University ~~(College)~~'s reasonable request, Coach will consult with appropriate parties concerning ~~an —~~ ~~(Company Name) — product's~~ Nike products' design or performance, shall act as an instructor at a clinic sponsored in whole or in part by ~~—(Company Name)—~~ Nike, or give a lecture at an event sponsored in whole or in part by ~~—(Company Name)—~~ Nike, or make other educationally-related appearances as may be reasonably requested by the University ~~(College)~~. Notwithstanding the foregoing sentence, Coach shall retain the right to decline such appearances as Coach reasonably determines to conflict with or hinder his duties and obligations as head ~~—(Sport)—~~ women's soccer coach. In order to avoid entering into an agreement with a competitor of ~~—(Company Name)—~~ Nike, Coach shall submit all outside consulting agreements to the University ~~(College)~~ for review and approval prior to execution. Coach shall also report such outside income to the University ~~(College)~~ in accordance with NCAA ~~(or NAIA)~~ rules. Coach further agrees that Coach will not endorse any athletic footwear, apparel and/or equipment products, including ~~—(Company Name)—~~ Nike, and will not participate in any messages or promotional appearances which contain a comparative or qualitative description of athletic footwear, apparel or equipment products.

3.3 General Conditions of Compensation. All compensation provided by the University ~~(College)~~ to Coach is subject to deductions and withholdings as required by law or the terms and conditions of any fringe benefit in which Coach participates. However, if any fringe benefit is based in whole or in part upon the compensation provided by the University ~~(College)~~ to Coach, such fringe benefit shall be based only on the compensation provided pursuant to section 3.1.1, except to the extent required by the terms and conditions of a specific fringe benefit program.

#### ARTICLE 4

4.1. Coach's Specific Duties and Responsibilities. In consideration of the compensation specified in this Agreement, Coach, in addition to the obligations set forth elsewhere in this Agreement, shall:



4.1.1. Devote Coach's full time and best efforts to the performance of Coach's duties under this Agreement;

4.1.2. Develop and implement programs and procedures with respect to the evaluation, recruitment, training, and coaching of Team members which enable them to compete successfully and reasonably protect their health, safety, and well-being;

4.1.3. Observe and uphold all academic standards, requirements, and policies of the University ~~(College)~~ and encourage Team members to perform to their highest academic potential and to graduate in a timely manner; and

4.1.4. Know, recognize, and comply with all applicable laws and the policies, rules and regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, and the NCAA ~~(or NAIA)~~; supervise and take appropriate steps to ensure that Coach's assistant coaches, any other employees for whom Coach is administratively responsible, and the members of the Team know, recognize, and comply with all such laws, policies, rules and regulations; and immediately report to the Director and to the Department's Director of Compliance if Coach has reasonable cause to believe that any person or entity, including without limitation representatives of the University ~~(College)~~'s athletic interests, has violated or is likely to violate any such laws, policies, rules or regulations. Coach shall cooperate fully with the University ~~(College)~~ and Department at all times. The names or titles of employees whom Coach supervises are attached as Exhibit C. The applicable laws, policies, rules, and regulations include: (a) State Board of Education and Board of Regents of the University of Idaho Governing Policies and Procedures and Rule Manual; (b) University ~~(College)~~'s Handbook; (c) University ~~(College)~~'s Administrative Procedures Manual; (d) the policies of the Department; (e) NCAA ~~(or NAIA)~~ rules and regulations; and (f) the rules and regulations of the ~~(Sport)~~ soccer conference of which the University ~~(College)~~ is a member.

**4.2** Outside Activities. Coach shall not undertake any business, professional or personal activities, or pursuits that would prevent Coach from devoting Coach's full time and best efforts to the performance of Coach's duties under this Agreement, that would otherwise detract from those duties in any manner, or that, in the opinion of the University ~~(College)~~, would reflect adversely upon the University ~~(College)~~ or its athletic program. Subject to the terms and conditions of this Agreement, Coach may, with the prior written approval of the Director, who may consult with the President, enter into separate arrangements for outside activities and endorsements which are consistent with Coach's obligations under this Agreement. Coach may not use the University ~~(College)~~'s name, logos, or trademarks in connection with any such arrangements without the prior written approval of the Director and the President.

**4.3** NCAA ~~(or NAIA)~~ Rules. In accordance with NCAA ~~(or NAIA)~~ rules, Coach shall obtain prior written approval from the University ~~(College)~~'s President for all athletically related income and benefits from sources outside the University ~~(College)~~ and shall ~~report~~ provide a written detailed account of the source and amount of all such



income and benefits to the University ~~(College)~~'s President whenever reasonably requested, but in no event less than annually before the close of business on June 30th of each year or the last regular University ~~(College)~~ work day preceding June 30th. The report shall be in a format reasonably satisfactory to University ~~(College)~~. Sources of such income include, but are not limited to, the following:

- (a) Income from annuities;
- (b) Sports camps;
- (c) Housing benefits, including preferential housing arrangements;
- (d) Country club memberships;
- (e) Complimentary ticket sales;
- (f) Television and radio programs; and
- (g) Endorsement or consultation contracts with athletics shoe, apparel or equipment manufacturers.

In no event shall Coach accept or receive directly or indirectly any monies, benefits, or gratuities whatsoever from any person, association, corporation, University ~~(College)~~ booster club, University ~~(College)~~ alumni association, University ~~(College)~~ foundation, or other benefactor, if the acceptance or receipt of the monies, benefits, or gratuities would violate applicable law or the policies, rules, and regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(or NAIA)~~.

4.4 Hiring Authority. Coach shall have the responsibility and the sole authority to recommend to the Director the hiring and termination of assistant coaches for the Team, but the decision to hire or terminate an assistant coach shall be made by the Director and shall, when necessary or appropriate, be subject to the approval of President and the University ~~(College)~~'s Board of ~~(Trustees or Regents)~~.

4.5 Scheduling. Coach shall consult with, and may make recommendations to, the Director or the Director's designee with respect to the scheduling of Team competitions, but the final decision shall be made by the Director or the Director's designee.

~~4.7~~4.6 Other Coaching Opportunities. Coach shall not, under any circumstances, interview for, negotiate for, or accept employment as a coach at any other institution of higher education or with any professional sports team, requiring performance of duties prior to the expiration of this Agreement, without the prior approval of the Director. Such approval shall not be unreasonably ~~be~~ withheld.

## ARTICLE 5

5.1 Termination of Coach for Cause. The University ~~(College)~~ may, in its discretion, suspend Coach from some or all of Coach's duties, temporarily or permanently, and with or without pay; reassign Coach to other duties; or terminate this Agreement at any time for good or adequate cause, as those terms are defined in applicable rules and regulations.

5.1.1 In addition to the definitions contained in applicable rules and



regulations, University ~~(College)~~ and Coach hereby specifically agree that the following shall constitute good or adequate cause for suspension, reassignment, or termination of this Agreement:

- a) A deliberate or major violation of Coach's duties under this agreement or the refusal or unwillingness of Coach to perform such duties in good faith and to the best of Coach's abilities;
- b) The failure of Coach to remedy any violation of any of the terms of this agreement within 30 days after written notice from the University ~~(College)~~;
- c) A deliberate or major violation by Coach of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference or the NCAA ~~(NAIA)~~, including but not limited to any such violation which may have occurred during the employment of Coach at another NCAA or NAIA member institution;
- d) Ten (10) working days' absence of Coach from duty without the University ~~(College)~~'s consent;
- e) Any conduct of Coach that constitutes moral turpitude or that would, in the University ~~(College)~~'s judgment, reflect adversely on the University ~~(College)~~ or its athletic programs;
- f) The failure of Coach to represent the University ~~(College)~~ and its athletic programs positively in public and private forums;
- g) The failure of Coach to fully and promptly cooperate with the NCAA ~~(NAIA)~~ or the University ~~(College)~~ in any investigation of possible violations of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(NAIA)~~;
- h) The failure of Coach to report a known violation of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(NAIA)~~, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team; or
- i) A violation of any applicable law or the policies, rules or regulations of the University ~~(College)~~, the University ~~(College)~~'s governing board, the conference, or the NCAA ~~(NAIA)~~, by one of Coach's assistant coaches, any other employees for whom Coach is administratively responsible, or a member of the Team if Coach



knew or should have known of the violation and could have prevented it by ordinary supervision.

5.1.2 Suspension, reassignment, or termination for good or adequate cause shall be effectuated by the University ~~(College)~~ as follows: before the effective date of the suspension, reassignment, or termination, the Director or his or her designee shall provide Coach with notice, which notice shall be accomplished in the manner provided for in this Agreement and shall include the reason(s) for the contemplated action. Coach shall then have an opportunity to respond. After Coach responds or fails to respond, University ~~(College)~~ shall notify Coach whether, and if so when, the action will be effective.

5.1.3 In the event of any termination for good or adequate cause, the University ~~(College)~~'s obligation to provide compensation and benefits to Coach, whether direct, indirect, supplemental or collateral, shall cease as of the date of such termination, and the University ~~(College)~~ shall not be liable for the loss of any collateral business opportunities or other benefits, perquisites, or income resulting from outside activities or from any other sources.

5.1.4 If found in violation of NCAA ~~(NAIA)~~ regulations, Coach shall, in addition to the provisions of Section 5.1, be subject to disciplinary or corrective action as set forth in the provisions of the NCAA ~~(NAIA)~~ enforcement procedures, including suspension without pay or termination of employment for significant or repetitive violations. This section applies to violations occurring at the University ~~(College)~~ or at previous institutions at which the Coach was employed.

## 5.2 Termination of Coach for Convenience of University ~~(College)~~.

5.2.1 At any time after commencement of this Agreement, University ~~(College)~~, for its own convenience, may terminate this Agreement by giving ten (10) days prior written notice to Coach.

5.2.2 In the event that University ~~(College)~~ terminates this Agreement for its own convenience, University ~~(College)~~ shall ~~be obligated~~ pay to ~~pay~~ Coach, ~~as liquidated damages and not a penalty~~, the salary set forth in section 3.1.1(a), excluding all deductions required by law, on the regular paydays of University ~~(College)~~ until the term of this Agreement ends; ~~provided~~, however, in the event Coach obtains other employment of any kind or nature after such termination, then the amount of compensation ~~the~~ University pays will be adjusted and reduced by the amount of compensation paid Coach as a result of such other employment, such adjusted compensation to be calculated for each University pay-period by reducing the gross salary set forth in section 3.1.1(a) (before deductions required by law) by the gross compensation paid to Coach under the other employment, then subtracting from this adjusted gross compensation ~~deduction~~ deductions according to law. In addition, Coach will be entitled to continue his health insurance plan and group life insurance as if he



remained a University ~~(College)~~ employee until the term of this Agreement ends or until Coach obtains reasonably comparable employment or any other employment providing Coach with a reasonably comparable health plan and group life insurance, whichever occurs first. Coach shall be entitled to no other compensation or fringe benefits, except as otherwise provided herein or required by law. Coach specifically agrees to inform University within ten business days of obtaining other employment, and to advise University of all relevant terms of such employment, including without limitation the nature and location of the employment, salary, other compensation, health insurance benefits, life insurance benefits, and other fringe benefits. Failure to so inform and advise University shall constitute a material breach of this Agreement and University's obligation to pay compensation under this provision shall end. ~~Coach agrees not to accept employment for compensation at less than the fair value of Coach's services, as determined by all circumstances existing at the time of employment.~~ Coach further agrees to repay to University all compensation paid to him by University after the date he obtains other employment, to which he is not entitled under this provision.

5.2.3 ~~The parties have both~~ University has been represented by legal counsel, and Coach has either been represented by legal counsel or has chosen to proceed without legal counsel, in the contract negotiations ~~and~~. The parties have bargained for and agreed to the foregoing ~~liquidated damages~~ provision, giving consideration to the fact that the Coach may lose certain benefits, supplemental compensation, or outside compensation relating to his employment with University ~~(College), which damages that~~ are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by University ~~(College)~~ and the acceptance thereof by Coach shall constitute adequate and reasonable compensation to Coach for the damages and injury suffered by Coach because of such termination by University ~~(College)~~. The liquidated damages are not, and shall not be construed to be, a penalty.

### 5.3 Termination by Coach for Convenience.

5.3.1 The Coach recognizes that his promise to work for University ~~(College)~~ for the entire term of this Agreement is of the essence of this Agreement. The Coach also recognizes that the University ~~(College)~~ is making a highly valuable investment in his employment by entering into this Agreement and that its investment would be lost were he to resign or otherwise terminate his employment with the University ~~(College)~~ before the end of the contract term.

5.3.2 The Coach, for his own convenience, may terminate this Agreement during its term by giving prior written notice to the University ~~(College)~~. Termination shall be effective ten (10) days after notice is given to the University ~~(College)~~.

5.3.3 If the Coach terminates this Agreement for convenience at any time, all obligations of the University ~~(College)~~ shall cease as of the effective date of the termination. If the Coach terminates this Agreement for his convenience he shall pay to the University ~~(College), as liquidated damages and not a penalty, for the breach of this~~

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~~Agreement~~ the following ~~sums~~sums: (a) if the Agreement is terminated on or before ~~December 31, 2013~~, the sum of ~~\$30,000.00~~10,000; (b) if the Agreement is terminated between ~~\_\_\_\_\_~~ and ~~January 1, 2014 and December 31, 2014~~ inclusive, the sum of ~~\$20,000.00~~5,000; (c) if the Agreement is terminated between ~~\_\_\_\_\_~~ and ~~\_\_\_\_\_~~ inclusive, ~~the sum of \$10,000.00. The liquidated damages~~January 1, 2015 and December 31, 2015 inclusive, there will be no buyout payment. Sums shall be due and payable within twenty (20) days of the effective date of the termination, and any unpaid amount shall bear simple interest at a rate eight (8) percent per annum until paid.

5.3.4 ~~The parties have both~~University has been represented by ~~legal counsel, and Coach has either been represented by legal counsel or has chosen to proceed without~~ legal counsel in the contract negotiations ~~and~~. ~~The parties~~ have bargained for and agreed to the foregoing ~~liquidated damages~~ provision, giving consideration to the fact that the University ~~(College)~~ will incur administrative and recruiting costs in obtaining a replacement for Coach, in addition to potentially increased compensation costs if Coach terminates this Agreement for convenience, ~~which damages that~~ are extremely difficult to determine with certainty. The parties further agree that the payment of such liquidated damages by Coach and the acceptance thereof by University ~~(College)~~ shall constitute adequate and reasonable compensation to University ~~(College)~~ for the damages and injury suffered by it because of such termination by Coach. The liquidated damages are not, and shall not be construed to be, a penalty. This section 5.3.4 shall not apply if Coach terminates this Agreement because of a material breach by the University ~~(College)~~.

~~5.3.5~~5.3.5. Except as ~~provide~~provided elsewhere in this Agreement, if Coach terminates this Agreement for convenience, he shall forfeit to the extent permitted by law his right to receive all supplemental compensation and other payments.

#### 5.4 Termination due to Disability or Death of Coach.

5.4.1 Notwithstanding any other provision of this Agreement, this Agreement shall terminate automatically if Coach becomes totally or permanently disabled as defined by the University ~~(College)~~'s disability insurance carrier, becomes unable to perform the essential functions of the position of head coach, or dies.

5.4.2 If this Agreement is terminated because of Coach's death, Coach's salary and all other benefits shall terminate as of the last day worked, except that the Coach's personal representative or other designated beneficiary shall be paid all compensation due or unpaid and death benefits, if any, as may be contained in any fringe benefit plan now in force or hereafter adopted by the University ~~(College)~~ and due to the Coach's estate or beneficiaries thereunder.

5.4.3 If this Agreement is terminated because the Coach becomes totally or permanently disabled as defined by the University ~~(College)~~'s disability insurance carrier, or becomes unable to perform the essential functions of the position of head

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coach, all salary and other benefits shall terminate, except that the Coach shall be entitled to receive any compensation due or unpaid and any disability-related benefits to which he is entitled by virtue of employment with the University ~~(College)~~.

5.5 Interference by Coach. In the event of termination, suspension, or reassignment, Coach agrees that Coach will not interfere with the University ~~(College)~~'s student-athletes or otherwise obstruct the University ~~(College)~~'s ability to transact business or operate its intercollegiate athletics program.

~~5.7~~5.6 No Liability. The University ~~(College)~~ shall not be liable to Coach for the loss of any collateral business opportunities or any other benefits, perquisites or income from any sources that may ensue as a result of any termination of this Agreement by either party or due to death or disability or the suspension or reassignment of Coach, regardless of the circumstances.

~~5.8~~5.7 Waiver of Rights. Because the Coach is receiving a multi-year contract and the opportunity to receive supplemental compensation and because such contracts and opportunities are not customarily afforded to University ~~(College)~~ employees, if the University ~~(College)~~ suspends or reassigns Coach, or terminates this Agreement for good or adequate cause or for convenience, Coach shall have all the rights provided for in this Agreement but hereby releases the University ~~(College)~~ from compliance with the notice, appeal, and similar employment-related rights provide for in the State Board of Education and Board or Regents of the University of Idaho Rule Manual (IDAPA 08) and Governing Policies and Procedures Manual, and the University ~~(College)~~ Faculty-Staff Handbook.

## ARTICLE 6

6.1 Board Approval. This Agreement shall not be effective until and unless approved of the University ~~(College)~~'s Board of ~~-(Regents or Trustees)-~~ and executed by both parties as set forth below. In addition, the payment of any compensation pursuant to this agreement shall be subject to the approval of the University ~~(College)~~'s Board of ~~-(Regents or Trustees)-~~, the President, and the Director; the sufficiency of legislative appropriations; the receipt of sufficient funds in the account from which such compensation is paid; and the Board of ~~-(Regents or Trustees)-~~ and University ~~(College)~~'s rules regarding financial exigency.

6.2 University ~~(College)~~ Property. All personal property (excluding vehicle(s) provided through the Vandal Wheels program), material, and articles of information, including, without limitation, keys, credit cards, personnel records, recruiting records, team information, films, statistics or any other personal property, material, or data, furnished to Coach by the University ~~(College)~~ or developed by Coach on behalf of the University ~~(College)~~ or at the University ~~(College)~~'s direction or for the University ~~(College)~~'s use or otherwise in connection with Coach's employment hereunder are and shall remain the sole property of the University ~~(College)~~.

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Within twenty-four (24) hours of the expiration of the term of this agreement or its earlier termination as provided herein, Coach shall immediately cause any such personal property, materials, and articles of information in Coach's possession or control to be delivered to the Director.

6.3 Assignment. Neither party may assign its rights or delegate its obligations under this Agreement without the prior written consent of the other party.

6.4 Waiver. No waiver of any default in the performance of this Agreement shall be effective unless in writing and signed by the waiving party. The waiver of a particular breach in the performance of this Agreement shall not constitute a waiver of any other or subsequent breach. The resort to a particular remedy upon a breach shall not constitute a waiver of any other available remedies.

6.5 Severability. If any provision of this Agreement is determined to be invalid or unenforceable, the remainder of the Agreement shall not be affected and shall remain in effect.

6.6 Governing Law. This Agreement shall be subject to and construed in accordance with the laws of the state of Idaho as an agreement to be performed in Idaho. Any action based in whole or in part on this Agreement shall be brought in the courts of the state of Idaho.

6.7 Oral Promises. Oral promises of an increase in annual salary or of any supplemental or other compensation shall not be binding upon the University ~~(College)~~.

6.8 Force Majeure. Any prevention, delay or stoppage due to strikes, lockouts, labor disputes, acts of God, inability to obtain labor or materials or reasonable substitutes therefor, governmental restrictions, governmental regulations, governmental controls, enemy or hostile governmental action, civil commotion, fire or other casualty, and other causes beyond the reasonable control of the party obligated to perform (including financial inability), shall excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

6.9 Confidentiality. The Coach hereby consents and agrees that this document may be released and made available to the public after it is signed by the Coach. The Coach further agrees that all documents and reports he is required to produce under this Agreement may be released and made available to the public at the University ~~(College)~~'s sole discretion.

6.10 Notices. Any notice under this Agreement shall be in writing and be delivered in person or by public or private courier service (including U.S. Postal Service Express Mail) or certified mail with return receipt requested or by facsimile. All notices shall be addressed to the parties at the following addresses or at such other addresses as the parties may from time to time direct in writing:



the University ~~(College)~~:

Director of Athletics

University of Idaho  
P.O. Box 442302  
Moscow, Idaho 83844-2302

with a copy to:

President

University of Idaho  
P.O. Box 443151  
Moscow, ID 83844-3151

the Coach:

Peter Showler

Last known address on file with  
 University ~~(College)~~'s Human Resource Services

Any notice shall be deemed to have been given on the earlier of: (a) actual delivery or refusal to accept delivery, (b) the date of mailing by certified mail, or (c) the day facsimile delivery is verified. Actual notice, however and from whomever received, shall always be effective.

6.11 Headings. The headings contained in this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation hereof.

6.12 Binding Effect. This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties and their respective heirs, legal representatives, successors and assigns.

6.13 Non-Use of Names and Trademarks. The Coach shall not, without the University ~~(College)~~'s prior written consent in each case, use any name, trade name, trademark, or other designation of the University ~~(College)~~ (including contraction, abbreviation or simulation), except in the course and scope of his official University ~~(College)~~ duties.

6.14 No Third Party Beneficiaries. There are no intended or unintended third party beneficiaries to this Agreement.

6.15 Entire Agreement; Amendments. This Agreement constitutes the entire agreement of the parties and supersedes all prior agreements and understandings with respect to the same subject matter. No amendment or modification of this Agreement shall be effective unless in writing, signed by both parties, and approved by University ~~(College)~~'s Board of ~~(Regents or Trustees)~~.

6.16 Opportunity to Consult with Attorney. The Coach acknowledges that he has had the opportunity to consult and review this Agreement with an attorney and has either consulted with legal counsel or chosen not to. Accordingly, in all cases, the

~~Model Contract version: 12/9/2010~~ Employment Agreement-Showler

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language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any party.

UNIVERSITY ~~(COLLEGE)~~

COACH

M. Duane Nellis

Date

\_\_\_\_\_, President

~~Date~~

Peter Showler,

Date

~~Date~~

Approved by the Board of ~~(Regents or Trustees)~~ on the \_\_\_\_ day of \_\_\_\_\_, ~~2010~~ 2012.



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**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**SUBJECT**

II.G. Policies Regarding Faculty (institutional Faculty Only) – First Reading

**REFERENCE**

February 2012                      Board approved second reading for II.G. Policies Regarding Faculty (Institutional Faculty Only)

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section II.G. Policies Regarding Faculty (institutional Faculty Only)

**BACKGROUND/DISCUSSION**

Board Policy II.G.6 is intended to provide coverage for the acquisition and evaluation of tenure for institutional faculty. Specifically, Board Policy II.G.6 (e), provides that in granting tenure, the chief executive officer will consider the evaluations of each candidate by a committee appointed for the purpose of annual evaluations and tenure status.

Consistent with this policy section, the committee must consist of tenured and non-tenured faculty, student representation, and one or more representatives from outside the department. Institutions have expressed interest in amending language to this policy section that will provide flexibility for the composition of the committee and provide for student and non-tenured faculty participation to be optional and not a requirement.

**IMPACT**

The amendments to Board Policy II.G.6 (e) will allow institutions to begin reorganizing their tenure evaluation committees.

**ATTACHMENTS**

Attachment 1 – II.G Policies Regarding Faculty, 1<sup>st</sup> reading

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

Currently, Board Policy II.G.6 (e) requires the composition of the committee to include student representation and non-tenured faculty. Institutions would like to amend the policy to make those optional. In May 2012, the Council on Academic Affairs and Programs considered the proposed policy amendments and recommended approval.

Staff recommends approval as presented.

**BOARD ACTION**

I move to approve the first reading of amendments to Board Policy II.G. Policies Regarding Faculty (Institutional Faculty Only) as presented.

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



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**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) February-December 2012****1. Letters of Employment**

- a. All faculty employees serve pursuant to employment contracts. The employment contract must include the period of the appointment, salary, pay periods, position title, employment status and such other information as the institution may elect to include in order to define the contract of employment. Non-tenured faculty employees have no continued expectation of employment beyond their current contract of employment. Each faculty employee must acknowledge receipt and acceptance of the terms of the employment contract by signing and returning a copy to the institution initiating the offer of appointment. Failure or refusal of the faculty employee to sign and return a copy of the employment contract within the time specified in the contract is deemed to be a rejection of the offer of employment unless the parties have mutually agreed in writing to extend the time. Nothing in this paragraph prohibits the institution from extending another offer to the employee in the event the initial offer was not signed and returned in a timely manner. Any alteration by the employee of the offer is deemed a counter-offer requiring an affirmative act of acceptance by an officer authorized to enter into contracts of employment binding the institution. Each contract of employment must include a statement to the following effect and intent: "The terms of employment set forth in this letter (contract) of employment are also subject to the Governing Policies and Procedures of the State Board of Education (or the Board of Regents of the University of Idaho, in the case of the University of Idaho), and the policies and procedures of (the institution)."
- b. Term of Appointment - All non-tenure faculty employees have fixed terms of employment. Except as provided herein, no contract of employment with such an employee may exceed one (1) year. The institutions may implement policies allowing for multi-year contracts for certain classifications of non-tenure track faculty members. Such policies must include, at a minimum, the following requirements: (1) no contract of appointment may exceed three (3) years without prior Board approval; (2) all multi-year employment contracts shall be approved in writing by the institution's Chief Executive Officer or designee; and (3) all multi-year contracts must be reported to the Board at the next regular meeting. Employment is subject to satisfactory annual performance review with informal review at the end of each semester.

A multi-year contract shall also state that it may be terminated at any time for adequate cause, as defined in Section II.L. of Board policy, or when the Board declares a state of financial exigency, as defined in Section II.N. of Board policy. The contract shall also state that it may be non-renewed pursuant to Section II.G.5. of Board policy.

Employment beyond the contract period may not be legally presumed. Reappointment of a faculty employment contract is subject solely to the discretion of the chief executive officer of the institution, and, where applicable, of the Board.



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) ~~February-December~~ 2012**

- c. Non-tenured faculty and tenured faculty, who serve pursuant to contracts of employment or notices (letters) of appointment containing a stated salary are not guaranteed such salary in subsequent contracts or appointments, and such salary is subject to adjustment during the contract period due to financial exigency (as provided for in Section II.N of Board Policy) or through furlough or work hour adjustments (as provided for in section II.B.2.c of Board Policy).
- d. Faculty Rank and Promotion
  - i. There are four (4) primary faculty ranks at each institution: (a) professor, (b) associate professor, (c) assistant professor, and (d) instructor. Each institution may establish additional faculty ranks, specify the title of each rank, and delineate the requirements for each faculty rank so established. Recommendations for additional faculty ranks must be submitted by the chief executive officer to the Board for approval.
  - ii. Faculty rank, including initial appointment to faculty rank and any promotion to a higher rank at an institution, is located in a department or equivalent unit.
  - iii. Each institution must establish criteria for initial appointment to faculty rank and for promotion in rank at the institution. Such criteria must be submitted to the Board for approval, and upon approval must be published and made available to the faculty.
  - iv. Persons who have made substantial contributions to their fields of specialization or who have demonstrated exceptional scholarship and competence or appropriate creative accomplishment of recognized outstanding quality may be appointed to faculty rank without satisfying established institutional criteria for initial appointment or promotion, provided that the qualifications of such individuals have been reviewed in accordance with institutional procedures and the appointment is recommended by the chief executive officer and approved by the Board.
  - v. A non-classified employee may hold faculty rank in a department or equivalent unit in which rank has previously been established by the institution. A non-classified employee may be granted rank at the time of appointment or subsequent thereto, or may be promoted in rank, if such employee meets the criteria for rank as established by the institution and approved by the Board.



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) February-December 2012****2. Compensation****a. Salary**

All initial salaries for faculty employees are established by the chief executive officer, subject to approval by the Board where applicable. Payment in addition to regular salaries must be authorized by the chief executive officer and reported to the Board. The Board may make subsequent changes for faculty employee positions or may set annual salary guidelines and delegate to its executive director authority to review compliance with its annual guidelines. Any annual salary increase outside Board guidelines requires specific and prior Board approval before such increase may be effective and paid to the employee. With the exception of the chief executive officers, and other positions whose appointment is a reserved Board Authority, approval of salaries shall be effective concurrently with Board approval of annual operating budgets for that fiscal year.

**b. Salaries, Increases and other Compensation related items**

- i. For purposes of categorizing faculty employees for salary and reporting purposes, the following definition applies: Faculty includes all persons whose specific assignments customarily are made for the purpose of conducting instruction, research, or public service as a principal activity (or activities), and who hold the following academic rank or titles of professor, associate professor, assistant professor, instructor, lecturer, or the equivalent of any of these academic ranks. Report in this category deans, directors, or the equivalents, as well as associate deans, assistant deans, and executive officers of academic departments (chairpersons, heads, or the equivalent) if their principal activity is instructional. Do not include student teaching or research assistants or medical interns or residents. (For reporting purposes, deans, associate deans, and assistant deans are included in the executive/administrative category.)
- ii. Credited State Service/Full Time Status - A faculty member employed for an academic year and paid over a twelve-month period will be credited with twelve (12) months of state service. For all benefit status determinations and calculations, faculty members shall be considered full time, year round employees of the employing institution as long as the employee's teaching; research and service duties are commensurate with the full time faculty work load assignment as defined by the employing institution.
- iii. Pay Periods - All faculty employees, including those on academic year appointments, are paid in accordance with a schedule established by the state controller.



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) ~~February-December~~ 2012**

- iv. Automobile Exclusion - Unless expressly authorized by Board policy, no faculty employee will receive an automobile or automobile allowance as part of his/her compensation.

**3. Annual Leave**

- a. Only faculty members serving twelve (12) month appointments earn annual leave. Such annual leave shall be earned in the same manner as for non-classified employees.
- b. Pursuant to section 59-1606(3), Idaho Code, when a faculty member has accrued annual leave for service on a 12 month appointment, and subsequently such faculty member returns to a faculty position of less than 12 months where annual leave does not accrue, then the institution may pay the faculty member, as supplemental pay, the accrued annual leave balance.

**c. Sabbatical Leave****i. Eligibility**

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

**ii. Term**

The term of a sabbatical leave is either one (1) academic semester at full pay or two (2) semesters at half pay.

**iii. Condition**

Each faculty member who is granted a sabbatical leave must serve at the institution for at least one (1) academic year after completion of the sabbatical unless the chief executive officer approves a waiver of the requirement.

**iv. Report on Sabbatical Leave**



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) ~~February-December~~ 2012**

By the end of the first semester following return to the institution from a sabbatical leave, the faculty member must submit a written account of sabbatical activities and accomplishments to the academic vice president.

v. Report to the Board

The chief executive officer must report the names of faculty members awarded sabbatical leaves and a brief statement of the purposes of each sabbatical in their semi-annual report to the Board

4. Performance Evaluation

- a. Annual Evaluation - Each year the chair of a department must submit to the dean of the chair's college an evaluation of each faculty member in the department. This evaluation, together with the input of higher administrators, will be used as (1) basis for the final recommendation relative to reappointment, non-reappointment, acquisition of tenure, or other personnel action, whichever is appropriate. The chairman must communicate an assessment of strengths and weaknesses to each faculty member evaluated.
- b. Evaluation Criteria - Evaluation of faculty should be made in terms of the individual's effectiveness. Each institution shall publish its criteria for annual evaluation and ensure that all members of the faculty have access to the criteria.
- c. Any written recommendations that result from evaluation of a faculty employee will be given to the employee and a copy will be placed in the employee's file.
- d. Each institution must develop policies, procedures, and measurement instruments to be used in the evaluation by students of faculty teaching effectiveness.

5. Non-renewal of Non-tenured Faculty Members

- a. Notice of non-renewal must be given in writing and in accordance with the following standards:
  - i. First Year Of Service - Not later than March 1 of the first full academic year of service if the appointment is not to be renewed at the end of the academic year; or if a one-year appointment terminates during an academic year and is not to be renewed, at least three (3) months in advance of its termination.
  - ii. Second Year of Service - Not later than December 15 of the second full academic year of service if the appointment is not to be renewed at the end of the academic year; or, if the appointment terminates during an academic year and is not to be renewed, at least six (6) months in advance of its termination.



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) ~~February-December~~ 2012**

- iii. Three (3) Or More Years Of Service – Not later than July 15 preceding the academic year at the end of which the appointment is to be terminated; or, if the appointment terminates during an academic year and is not to be renewed, at least twelve (12) months in advance of its termination.
- iv. Failure to provide timely notice of non-renewal because of mechanical, clerical, or mailing error does not extend or renew the letter or contract of employment for another term, but the existing term of employment will be extended to provide the employee with a timely notice of non-renewal.
- v. Financial Exigency - Notice of non-renewal is not required when the Board has authorized a reduction in force resulting from a declaration of financial exigency and a non-tenured faculty member is to be laid off. In that event, notice of layoff must be given as provided under the policies for reduction in force.

**b. Request For Review**

- i. Non-renewal is not subject to investigation or review except that the employee may request an investigation or review to establish that written notice was or was not received in accordance with the time requirements set forth in this section. In such cases, the investigation or review will be concerned only with manner and date of notification of non-renewal. The employee must request such investigation or review in writing of the chief executive officer within fifteen (15) days of receipt of the written notice of non-renewal.
  - ii. Provided, however, that if the non-tenured faculty member presents bona fide allegations and evidence in writing to the chief executive officer of the institution that the non-reappointment was the result of discrimination prohibited by applicable law, the non-tenured faculty member is entitled to use the internal discrimination grievance procedure to test the allegation. In such cases, the same procedures, burden of proof, time limits etc. as set forth for the grievance of non-renewal by non-classified employees shall be used (see subsection F).
- c. Non-tenured faculty members who are notified that they will not be reappointed or that the succeeding academic year will be the terminal year of appointment are not entitled to a statement of reasons upon which the decision for such action is based. No hearing to review such a decision will be held.

**6. Tenure**

- a. Tenure Defined - Tenure is a condition of presumed continuous employment following the expiration of a probationary period and after meeting the appropriate criteria. After tenure has been awarded, the faculty member's



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) February-December 2012**

service may be terminated only for adequate cause; except in the case of retirement or financial exigency as declared by the Board; in situations where extreme shifts of enrollment have eliminated the justification for a position; or where the Board has authorized elimination or substantial reduction in a program. Tenure status is available only to eligible, full-time institutional faculty members, as defined by the institution. All faculty appointments are subject to the approvals as required in Board policy. Nontenured members of the faculty are appointed to term appointments pursuant to subsection G1. Any commitment to employ a nontenured member of the faculty beyond the period of his or her current term of appointment is wholly ineffective.

**b. Acquisition of Tenure**

- i. Professional-Technical Faculty hired under the division of professional-technical education prior to July 1, 1993 who were granted tenure may retain tenure in accordance with these policies. Individuals hired under the Division of Professional-Technical education subsequent to July 1, 1993 are hired and employed as nontenure track faculty and will:
  - 1) be afforded the right to pursue promotion; and
  - 2) be considered and granted an employment contract in accordance with these policies and be subject to continued acceptable performance and/or the needs of the institution; and
  - 3) be afforded on opportunity to serve on institutional committees.
- ii. Academic faculty members, after meeting certain requirements, established by the employing institution, may acquire tenure. Each institution shall develop policies for the acquisition of tenure that are consistent with this general philosophy and policy statement of the Board. Acquisition of tenure is not automatic, by default or defacto, but requires an explicit judgment, decision, and approval. A faculty member is eligible to be evaluated for the acquisition of tenure after having completed four (4) full years of academic employment at the institution, although tenure may be awarded prior to completion of this initial eligibility period in certain exceptional cases as provided in Board Policy II.G.6.d.iv.1). In addition, an academic faculty member must be evaluated for the acquisition of tenure not later than the faculty member's sixth (6th) full academic year of employment at the institution. In certain exceptional cases a faculty member may petition for extension of the timeline for tenure due to extenuating circumstances as provided in Board Policy II.g.6.d.iv.2).



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) ~~February-December~~ 2012**

- c. Notification - An individual eligible for tenure must be informed, by proffered written contract, of appointment or nonappointment to tenure not later than June 30 after the academic year during which the decision is made. In case of denial of tenure, the faculty member must be given a written notice that tenure was denied.
- d. Standards of Eligibility for Tenure
  - i. Annual Appointments - Until the acquisition of tenure, all appointments are made for a period not to exceed one (1) year. Prior to the award of tenure, employment beyond the annual term of appointment may not be legally presumed.
  - ii. Service in Professional Rank - All satisfactory service in any professorial rank may be used to fulfill the time requirement for acquiring tenure. Each institution must develop criteria and rules by which prior service may be evaluated for inclusion in experience necessary for acquiring tenure.
  - iii. Service in Instructor Rank - A maximum of two (2) years satisfactory service in the rank of instructor at the institution will be allowed in partial fulfillment of the time requirement in the professorial ranks. Faculty members who hold the rank of instructor may be eligible for tenure status if provided for by the institution even though they teach in fields that have established professorial ranks.
  - iv. Exceptional Cases
    - 1) Tenure may be awarded prior to completion of the usual eligibility period in certain exceptional cases. In such cases, the burden of proof rests with the individual.
    - 2) Extension of the tenure review period may be granted in certain exceptional cases. In such cases the faculty member must formally request such an extension and indicate the reason for the request. An institution that permits an extension of the tenure review period must include in its policies the procedure a faculty member must follow to request such an extension, and the basis for determining the modified timeline for review.
- e. Evaluation For Tenure - It is expected that the chief executive officer, in granting tenure, will have sought and considered evaluations of each candidate by a committee appointed for the purpose of annual evaluations or tenure status. Such committee must ~~consist of~~include tenured faculty. It may also~~and~~ include non-tenured faculty; student representation; and one (1) or more representatives from outside the department. Each member of the



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) February-December 2012**

committee has an equal vote on all matters. The committee must give proper credence and weight to collective student evaluations of faculty members, as evidenced by an auditing procedure approved by the chief executive officer. The recommendation of the committee will be forwarded in writing through appropriate channels, along with written recommendations of the department chairperson or unit head, dean, and appropriate vice president, to the chief executive officer, who is responsible for making the final decision.

- f. Award of Tenure - The awarding of tenure to an eligible faculty member is made only by a positive action of the chief executive officer of the institution. The president must give notice in writing to the faculty member of the approval or denial of tenure. Notwithstanding any provisions in these policies to the contrary, no person will be deemed to have been awarded tenure because notice is not given
- g. Periodic Performance Review of Tenured Faculty Members - It is the policy of the Board that at intervals not to exceed five (5) years following the award of tenure to faculty members, the performance of tenured faculty must be reviewed by members of the department or unit and the department chairperson or unit head. The review must be conducted in terms of the tenured faculty member's continuing performance in the following general categories: teaching effectiveness, research or creative activities, professional related services, other assigned responsibilities, and overall contributions to the department.
  - i. Procedures for periodic review - Each institution must establish procedures for the performance review of tenured faculty members at the institution. Such procedures are subject to the review and approval of the Board. Each year the academic vice president or designee is responsible for designating in writing those tenured faculty members whose performance is subject to review during the year.
  - ii. Review standards - Each institution may establish its own internal review standards subject to approval by the Board. Absent such institutional standards, the institution must use the following standards.

If during the periodic review, the performance of a tenured faculty member is questioned in writing by a majority of members of the department or unit, the department chairperson or unit head, the appropriate dean, the appropriate vice president, or the chief executive officer, then the appropriate vice president or equivalent administrator must decide whether a full and complete review must be conducted in accordance with the procedures established for the initial evaluation for tenure at the institution. If during the periodic review, the performance of a tenured faculty member is not questioned in writing, members of the department or unit and the department chairperson or unit head must prepare a written



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) ~~February-December~~ 2012**

review statement that the performance review has been conducted and that a full and complete review is not required.

- iii. Exception for Associate Professors in the Promotion Process - Generally, the promotion from the rank of associate professor to full professor is considered no earlier than the fifth full year after attaining the rank of associate professor, which is generally contemporaneous with the granting of tenure. In such cases, if review for promotion to full professor is scheduled during the fifth, sixth or seventh full year after the award of tenure then the promotion review may, if it meets substantially similar criteria and goals of the post tenure review, take the place of the periodic performance review described here.
- iv. Termination of employment - If, following a full and complete review, a tenured faculty member's performance is judged to have been unsatisfactory or less than adequate during the period under review, the chief executive officer may initiate termination of employment procedures for the faculty member. In other words, an unsatisfactory or less than adequate performance rating shall constitute adequate cause for dismissal.
- h. Dismissal for Adequate Cause - Tenured faculty members may be dismissed for adequate cause as provided for in Subsection L of this Section.
- i. Tenure for Academic Administrators
  - i. "Academic administrators," for purposes of this topic, means the chief executive officer/presidents, chief academic officers/provosts, vice provosts or equivalent of the institutions, the deans, associate/assistant deans, and department chairs of the academic units of the institutions, and the vice presidents for research of the institutions, and shall not include persons occupying other administrative positions.
  - ii. An employee with tenure in an academic department or equivalent unit who is appointed to an academic administrator position retains tenure in that department or equivalent unit
  - iii. An individual hired for or promoted to an academic administrator may be considered for a tenured faculty rank in the appropriate department or equivalent unit. Such consideration is contingent upon approval by the institution's president.
  - iv. Upon termination of employment as an academic administrator, an employee with tenure may, at his or her option, return to employment in the department or equivalent unit in which he or she holds tenure unless such employee resigns, retires, or is terminated for adequate cause.



**GOVERNING POLICIES AND PROCEDURES****SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES****Subsection: G. Policies Regarding Faculty (Institutional Faculty Only) February-December 2012**

- v. An individual hired for a non-academic administrator position from outside the institution will not be considered for tenured faculty rank in conjunction with such appointment. However, he or she may be granted an adjunct faculty appointment, upon the recommendation of the appropriate department and dean and with the approval of the provost or chief academic officer and president, if the individual will teach and otherwise contribute to that department.
- vi. Notwithstanding the above, each administrative employee who is granted tenure shall be reviewed in accordance to policies established at each institution for the evaluation of an academic administrator.
- j. Terminal Contract of Employment - If a faculty member is not awarded tenure, the chief executive officer must notify the faculty member of the decision not to recommend tenure and may, at his or her discretion, either issue to the faculty member a contract for a terminal year of employment, or, at the sole discretion of the chief executive officer, issue to the faculty member contracts of employment for successive periods of one (1) year each. Such appointment for faculty members not awarded tenure must be on an annual basis, and such temporary appointments do not vest in the faculty member any of the rights inherent in tenure and there shall be no continued expectation of employment beyond the annual appointment.
- k. When authorized by the chief executive officer, or his or her designee, the year in which the tenure decision is made may be the terminal year of employment.
- l. Effect of lapse in service, transfer, reassignment, reorganization, and administrative responsibilities.
  - i. A non-tenured faculty member who has left the institution and is subsequently reappointed after a lapse of not more than three (3) years may have his or her prior service counted toward eligibility for the award of tenure. Eligibility for the award of tenure must be clarified in writing before reappointment. A tenured faculty member who has left the institution and is subsequently reappointed after a lapse of not more than three (3) years must have tenure status clarified in writing by the president or his designee before appointment. The faculty member may be reappointed with tenure, or may be required to serve additional years before being reviewed for tenure status.
  - ii. Before a non-tenured faculty member holding academic rank is moved from one position in the institution to another, the member must be informed in writing by the academic vice president, after consultation with



**GOVERNING POLICIES AND PROCEDURES**

**SECTION: II. HUMAN RESOURCES POLICIES AND PROCEDURES**

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the receiving department, as to the extent to which prior service may count toward eligibility for tenure status.

- iii. No faculty member's tenure in a discipline may be adversely affected by the reorganization of the administrative structure. A faculty member's tenure is not affected by reassignment of administrative responsibilities.
- iv. When a tenured faculty member is serving as department chairman, college dean, or in some other administrative or service capacity, retention of membership, academic rank, and tenure in the subject-matter department or similar unit is maintained. Should the administrative or service responsibilities terminate, the member takes up regular duties in the discipline within which membership, academic rank, and tenure was retained.



**BUSINESS AFFAIRS AND HUMAN RESOURCES  
OCTOBER 18, 2012**

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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
<b>1</b>	<b>FY 2013 SOURCES AND USES OF FUNDS</b>	Motion to approve
<b>2</b>	<b>AMENDMENT TO BOARD POLICY</b> Section V.N. Grants & Contracts – First Reading	Motion to approve
<b>3</b>	<b>AMENDMENT TO BOARD POLICY</b> Section V.B. Occupancy Costs – Second Reading	Motion to approve
<b>4</b>	<b>BOISE STATE UNIVERSITY</b> Employee Dependent Fee Waiver	Information item
<b>5</b>	<b>BOISE STATE UNIVERSITY</b> University Hotel	Information item
<b>6</b>	<b>UNIVERSITY of IDAHO</b> Arboretum Easement to Local Utility Provider	Motion to approve
<b>7</b>	<b>PERFORMANCE BASED FUNDING INITIATIVE</b>	Motion to approve
<b>8</b>	<b>FY 2014 CAPITAL BUDGET REQUESTS</b>	Motions to approve



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**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**SUBJECT**

FY 2013 College and University "Summary of Sources and Uses of Funds"

**APPLICABLE STATUTES, RULE OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Sections V.B.4.b.(1), V.B.5.c. and V.B.6.b.

**BACKGROUND/DISCUSSION**

The College and Universities receive funding from a variety of sources. A summary of the revenues sources is as follows:

**Revenue types include:**

Approp: General Funds – State appropriation of state funds

Approp: Endowment Funds – ISU, UI and LCSC are the beneficiaries of income from state endowment lands

Approp: Student Fees – Tuition and Fees approved by the Board; Legislature provides spending authority

Institutional Student Fees – Fees approved by the institution presidents

Federal Grants & Contracts – Grants and contracts awarded by the Federal government

Federal Student Financial Aid – funds passed through to students

State Grants & Contracts – Grants and contracts awarded by the State: may include state scholarships and work study funds

Private Gifts, Grants & Contracts – Other non-governmental gifts, grants and contracts

Sales & Services of Educational Activities – Includes: (i) revenues that are related incidentally to the conduct of instruction, research, and public service and (ii) revenues of activities that exist to provide instructional and laboratory experience for students and that incidentally create goods and services that may be sold to students, faculty, staff, and the general public. Examples would include sales of scientific and literary publications, testing services, etc.

Sales & Services of Auxiliary Enterprises – An institutional entity that exists predominantly to furnish goods or services to students, faculty, or staff, and that charges a fee directly related to the cost of the goods or services. Examples include residence halls, food services, student unions, bookstores, copy centers, health centers, etc.

Indirect Costs/Other – Also known as Facilities and Administrative (F&A) Cost recovery, on many grants an institution may charge a grantor for indirect costs. The expense to the grant is not a specifically identifiable cash outlay but a "recovery" of general overhead costs.



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The institutions' expenditures fall into the following standard functional categories:

**Expenditure Categories:**

Instruction – expenses for all activities that are part of an institution's instruction program (credit and noncredit courses; academic, vocational, and technical instruction; remedial and tutorial instruction; etc.)

Research – all expenses for individual and/or project research as well as that of institutes and research centers

Public Service -- expenses for activities established primarily to provide non-instructional services beneficial to individuals and groups external to the institution (e.g. conferences, institutes, radio and television, consulting, museums, etc.)

Library – expenses for retention, preservation, and display of educational materials and organized activities that directly support the operation of a catalogued or otherwise classified collection

Student Services – expenses incurred for offices of admissions, registrar and financial aid, student activities, cultural events, student newspapers, intramural athletics, student organizations, etc.

Physical Plant – all expenses for the administration, supervision, operation, maintenance, preservation, and protection of the institution's physical plant.

Institutional Support – expenses for central, executive-level activities concerned with management and long-range planning for the entire institution, such as planning and programming operations and legal services; fiscal operations; activities concerned with community and alumni relations, including development and fund raising; etc.

Academic Support – expenses incurred to provide support services for the institution's primary missions: instruction, research, and public service (includes academic administration, galleries, A-V services, etc.)

Athletics – expenses for intercollegiate sports programs are a separately budgeted auxiliary enterprise

Auxiliary Enterprises – an enterprise which exists to furnish goods or services to students, faculty, staff, other institutional departments, or incidentally to the general public, and charges a fee directly related to, although not necessarily equal to, the cost of the goods or services. The distinguishing characteristic of an auxiliary enterprise is that it is managed to operate as a self-supporting activity. Examples include residence halls, food services, student unions, bookstores, copy centers, health centers, etc.

Scholarships/Fellowships – includes expenses for scholarships and fellowships (from restricted or unrestricted funds) in the form of grants to students.

Federal Student Financial Aid – funds passed through to students

Other – institution specific unique budgeted expenditures (e.g. \$10M for UI's Center for Livestock and Environmental Studies)



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**IMPACT**

The attached worksheets provide a high level overview of the institutions' sources of funding and expenditures based on the standard categories listed above. It's important to understand that these figures represent the institutions' operating budgets excluding any mid-year adjustments (i.e. holdbacks). The trend analysis shows how the allocation of budgeted revenues and expenditures has changed since fiscal year 2006.

Two new lines are shown in this year's reports. First, line 7 in each report breaks out the amount of federal student financial aid receipts that are passed through to students. In the past, this amount has been included in line 6, Federal Grants and Contracts. By separating these amounts, the reader can see more easily the amount of federal awards for each institution. A note has been added for State Grants and Contracts to show this also includes state grants, scholarships and work study funds.

Second, line 24 shows the same amount of Federal Student Financial Aid as line 7, as noted above. In the past, this amount has been included in line 23, Scholarships/Fellowships. By separating these amounts, the reader can see more easily the amount of non-federal scholarships and fellowships in line 23 and that the revenues and expenses related to student financial aid have a zero impact on the budgets.

**STAFF COMMENTS AND RECOMMENDATIONS**

Institution staff will be available to answer questions from the Board.

**ATTACHMENTS**

Attachment 1 – Summary Report	Page 5
Attachment 2 – Boise State University	Page 6
Attachment 3 – Idaho State University	Page 7
Attachment 4 – University of Idaho	Page 8
Attachment 5 – Lewis-Clark State College	Page 9

**BOARD ACTION**

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



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**College and Universities  
Sources and Uses of Funds**

a		b	c	d	e	f	g	h	i	i vs b
		2006	2007	2008	2009	2010	2011	2012	2013	
		Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	% Change
<b>Revenues by Source:</b>										
1	Approp: General Funds	\$279,918,715	\$297,198,296	\$314,488,045	\$334,513,827	\$299,109,226	\$259,619,803	\$251,916,503	\$269,919,595	-4%
2	Approp: Federal Stimulus	\$0	\$0	\$0	\$0	\$15,140,600	\$4,305,900	\$0	\$0	0%
3	Approp: Endowment Funds	9,519,600	7,624,800	7,851,500	8,595,000	9,616,400	9,616,600	9,616,600	9,927,400	4%
4	Approp: Student Fees	119,816,276	125,321,912	127,138,432	133,817,937	147,923,452	177,342,376	202,215,526	216,238,128	80%
5	Institutional Student Fees	49,669,497	60,248,455	53,727,411	68,778,167	70,354,988	66,974,551	71,649,406	79,135,463	59%
6	Federal Grants & Contracts	250,422,559	250,065,986	265,635,778	306,549,636	345,950,919	389,010,370	415,693,822	112,497,648	-55%
7	Federal Student Financial Aid	0	0	0	0	0	0	0	312,522,291	100%
8	State Grants & Contracts (1)	26,981,445	28,005,013	29,078,797	22,579,764	19,547,568	19,791,273	21,583,007	22,152,755	-18%
9	Private Gifts, Grants & Contr	42,239,617	44,075,928	45,297,552	52,934,827	61,212,799	52,374,136	53,920,532	64,120,559	52%
10	Sales & Serv of Educ Act	41,522,693	40,712,881	53,122,434	37,016,556	36,919,925	36,783,785	30,744,992	24,044,782	-42%
11	Sales & Serv of Aux Ent	95,998,325	95,474,122	101,256,483	115,841,076	107,248,607	110,074,583	113,931,176	116,207,575	21%
12	Indirect Costs/Other	23,309,708	35,808,857	34,717,484	47,859,256	46,547,742	44,731,825	49,421,522	53,689,024	130%
13	<b>Total Revenues</b>	<b>\$939,398,435</b>	<b>\$984,536,249</b>	<b>\$1,032,313,916</b>	<b>\$1,128,486,046</b>	<b>\$1,159,572,226</b>	<b>\$1,170,625,202</b>	<b>\$1,220,693,086</b>	<b>\$1,280,455,220</b>	<b>36%</b>
14										
15	<b>Expenditures by Function</b>									
16	Instruction	\$267,682,477	\$288,176,766	\$296,335,596	\$308,044,914	\$291,533,121	\$294,191,076	\$301,572,754	\$318,647,448	19%
17	Research	121,739,799	120,728,803	129,378,452	127,785,344	125,105,050	128,674,626	127,060,429	138,537,678	14%
18	Public Service	37,755,661	40,543,600	47,171,968	47,864,534	49,677,930	49,068,029	47,316,195	48,191,701	28%
22	Academic Support	38,157,397	40,261,389	45,414,776	52,002,954	51,936,010	45,280,025	49,906,432	52,845,452	38%
19	Library	19,980,273	20,796,504	21,461,373	22,100,450	21,383,390	20,814,300	20,878,394	22,471,260	12%
20	Student Services	28,771,195	29,729,232	33,084,853	31,557,967	32,820,763	33,483,114	35,749,087	40,597,148	41%
21	Institutional Support	69,251,289	79,088,941	82,407,226	89,758,914	93,931,121	90,467,652	88,930,254	91,353,187	32%
22	Physical Plant	50,009,811	67,014,261	65,171,683	64,607,677	66,661,815	62,713,180	63,567,095	69,663,266	39%
23	Scholarships/Fellowships	179,488,176	175,476,100	182,353,547	232,823,600	266,065,077	294,625,270	330,513,313	29,479,224	-84%
24	Federal Student Financial Aid	0	0	0	0	0	0	0	312,522,291	100%
25	Auxiliary Enterprises (2)	93,127,882	84,911,812	112,383,363	122,813,491	95,677,135	91,616,578	92,340,574	92,031,875	-1%
26	Athletics	31,573,554	37,804,304	42,079,331	49,026,816	49,707,574	57,338,387	58,102,906	64,064,804	103%
27	Other	390,486	277,400	237,100	1,020,367	14,171,537	3,045,065	2,641,078	1,659,729	325%
28										
29	<b>Total Bdgt by Function</b>	<b>\$937,928,000</b>	<b>\$984,809,112</b>	<b>\$1,057,479,268</b>	<b>\$1,149,407,028</b>	<b>\$1,158,670,523</b>	<b>\$1,171,317,303</b>	<b>\$1,218,578,511</b>	<b>\$1,282,065,063</b>	<b>37%</b>

(1) Includes state grants, scholarships, and work study

(2) Auxiliary Enterprises includes University of Idaho's Student Recreation Center



**Boise State University  
Sources and Uses of Funds**

a		b	c	d	e	f	g	h	i	i vs b
		2006	2007	2008	2009	2010	2011	2012	2013	
		Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	% Change
<b>Revenues by Source:</b>										
1	Approp: General Funds	\$77,159,390	\$82,700,657	\$87,917,018	\$95,700,847	\$78,835,980	\$70,506,500	\$68,005,800	\$74,496,000	-3%
2	Approp: Federal Stimulus	-	-	-	-	4,856,400	1,381,100	-	-	0%
3	Approp: Endowment Funds	0	0	0	0	0	0	0	0	0%
4	Approp: Student Fees	41,320,900	44,221,300	46,870,800	50,322,017	55,165,000	61,818,400	70,126,300	76,318,400	85%
5	Institutional Student Fees	19,080,195	26,231,241	18,728,250	30,380,097	29,373,721	24,094,812	27,302,419	31,241,972	64%
6	Federal Grants & Contracts	55,016,949	58,133,999	59,296,679	84,068,486	89,641,739	91,434,574	114,526,277	32,100,129	-42%
7	Federal Student Financial Aid								93,000,000	100%
8	State Grants & Contracts (2)	7,883,212	7,647,024	7,799,964	3,246,324	2,840,328	2,897,135	3,379,468	2,502,674	-68%
9	Private Gifts, Grants & Contr	5,596,314	7,378,471	10,021,346	13,309,333	22,489,477	17,621,575	17,222,042	24,613,704	340%
10	Sales & Serv of Educ Act	4,257,000	1,800,000	1,108,983	0	0	0	0	0	-100%
11	Sales & Serv of Aux Ent	40,977,493	40,194,638	42,643,084	56,966,521	49,268,011	47,671,784	54,170,604	53,138,693	30%
12	Indirect Costs/Other	5,391,625	16,049,705	14,466,121	18,679,149	18,356,568	12,801,879	20,470,917	25,874,959	380%
13	<b>Total Revenues</b>	<b>\$256,683,078</b>	<b>\$284,357,034</b>	<b>\$288,852,245</b>	<b>\$352,672,774</b>	<b>\$350,827,224</b>	<b>\$330,227,759</b>	<b>\$375,203,827</b>	<b>\$413,286,531</b>	<b>61%</b>
14										
<b>Expenditures by Function</b>										
16	Instruction	\$82,157,835	\$87,296,917	\$89,639,975	\$95,003,418	\$86,989,423	\$90,631,721	\$92,024,606	\$102,215,854	24%
17	Research	11,655,171	11,740,987	13,413,787	17,891,374	18,088,831	15,026,939	19,967,082	30,867,286	165%
18	Public Service	10,225,134	10,229,817	10,884,802	13,130,655	12,534,632	12,786,895	12,177,939	13,479,370	32%
22	Academic Support	13,584,601	14,300,067	14,708,294	18,854,391	22,050,035	15,686,466	18,826,838	19,966,959	47%
19	Library	6,625,894	6,968,244	7,135,544	7,407,503	7,160,147	6,997,873	6,902,947	7,291,196	10%
20	Student Services	7,084,052	7,427,013	9,166,797	10,269,955	13,195,914	11,941,830	12,117,207	16,026,556	126%
21	Institutional Support	19,040,763	23,277,272	22,961,137	30,496,067	33,745,968	26,710,970	28,989,836	29,764,591	56%
22	Physical Plant	12,381,078	23,045,219	14,597,502	17,037,209	18,189,410	15,081,111	15,398,849	20,339,348	64%
23	Scholarships/Fellowships	45,635,561	49,034,486	50,787,808	68,285,664	72,646,006	71,650,735	96,328,558	10,846,409	-76%
24	Federal Student Financial Aid								93,000,000	100%
25	Auxiliary Enterprises	33,136,189	34,750,662	58,090,714	67,963,096	38,904,476	33,068,047	38,755,931	36,169,293	9%
26	Athletics (1)	14,934,908	16,889,631	19,719,525	25,584,503	26,312,240	32,806,108	33,540,533	37,883,119	154%
27	Other	0	0	0	0	800,000	1,381,100	530,400	0	0%
28										
29	<b>Total Bdgt by Function</b>	<b>\$256,461,186</b>	<b>\$284,960,315</b>	<b>\$311,105,885</b>	<b>\$371,923,835</b>	<b>\$350,617,082</b>	<b>\$333,769,795</b>	<b>\$375,560,726</b>	<b>\$417,849,981</b>	<b>63%</b>

(1) General Education program supports intercollegiate athletics which is an auxiliary enterprise and reported in the General Education column not the auxiliary enterprise column.

(2) Includes state grants, scholarships, and work study



**Idaho State University  
Sources and Uses of Funds**

a		b	c	d	e	f	g	h	i	i vs b
		2006	2007	2008	2009	2010	2011	2012	2013	
		Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	% Change
<b>Revenues by Source:</b>										
1	Approp: General Funds	\$73,388,911	\$77,670,511	\$82,812,633	\$87,622,446	\$78,598,679	\$70,977,925	\$68,913,825	\$74,049,598	1%
2	Approp: Federal Stimulus	-	-	-	-	4,126,300	1,173,500	-	-	0%
3	Approp: Endowment Funds	1,602,800	1,697,400	1,843,500	2,020,700	2,121,300	2,121,500	2,121,500	2,125,600	33%
4	Approp: Student Fees	32,442,976	32,294,712	32,365,532	34,013,220	37,588,552	46,318,776	53,342,096	56,204,528	73%
5	Institutional Student Fees	14,414,106	16,071,314	17,184,861	18,281,770	19,699,467	21,224,439	22,400,287	24,954,791	73%
6	Federal Grants & Contracts	81,665,610	80,075,287	85,056,199	89,146,950	103,935,280	120,640,296	121,810,845	18,717,019	-77%
7	Federal Student Financial Aid								99,897,691	100%
8	State Grants & Contracts (1)	7,389,933	7,174,189	7,229,833	7,560,240	8,034,740	8,638,938	10,321,739	11,786,781	59%
9	Private Gifts, Grants & Contr	12,623,178	11,726,432	10,911,881	12,012,194	13,366,222	13,038,361	16,558,590	18,948,455	50%
10	Sales & Serv of Educ Act	3,324,093	3,779,481	4,462,051	4,930,056	5,146,525	5,124,285	5,427,392	5,478,282	65%
11	Sales & Serv of Aux Ent	20,061,353	21,152,209	21,976,328	22,222,614	20,371,796	20,904,227	21,275,772	23,003,482	15%
12	Indirect Costs/Other	5,709,483	7,785,852	8,405,673	9,560,307	8,728,874	10,195,746	10,584,135	9,381,265	64%
13	<b>Total Revenues</b>	<b>\$252,622,443</b>	<b>\$259,427,387</b>	<b>\$272,248,491</b>	<b>\$287,370,497</b>	<b>\$301,717,735</b>	<b>\$320,357,993</b>	<b>\$332,756,181</b>	<b>\$344,547,492</b>	<b>36%</b>
14										
<b>Expenditures by Function</b>										
16	Instruction	\$80,248,202	\$85,772,004	\$88,505,670	\$92,765,539	\$89,304,998	\$89,060,654	\$92,732,030	\$99,085,733	23%
17	Research	23,988,606	25,473,180	26,517,682	29,973,932	30,392,481	34,018,929	36,568,011	36,293,273	51%
18	Public Service	4,219,670	4,024,912	4,512,895	4,826,166	3,851,861	3,180,603	5,166,057	4,931,209	17%
22	Academic Support	9,757,741	10,216,285	11,792,910	13,319,827	12,668,776	12,764,214	13,196,267	14,610,603	50%
19	Library	4,892,400	5,111,275	5,372,714	5,390,026	4,939,251	4,924,218	4,923,422	5,310,128	9%
20	Student Services	8,158,477	7,985,965	8,144,786	8,455,009	7,804,741	7,563,755	7,592,089	8,273,681	1%
21	Institutional Support	15,539,433	17,009,000	16,998,353	18,575,992	18,432,015	22,035,515	22,336,175	23,672,120	52%
22	Physical Plant	13,648,045	14,192,706	15,045,944	15,576,677	18,031,943	16,804,498	17,545,953	19,067,230	40%
23	Scholarships/Fellowships	69,206,302	66,368,825	71,621,259	74,518,868	89,821,109	103,552,073	105,199,169	4,422,581	-94%
24	Federal Student Financial Aid								99,897,691	100%
25	Auxiliary Enterprises	17,939,811	16,061,787	18,208,958	17,470,121	16,583,859	16,971,281	17,382,243	18,438,882	3%
26	Athletics	4,239,977	7,800,380	7,935,703	8,019,039	7,949,803	8,045,694	8,182,213	8,743,625	106%
27	Other	0	0	0	0	2,534,237	1,425,765	2,110,678	1,594,729	100%
28										
29	<b>Total Bdgt by Function</b>	<b>\$251,838,664</b>	<b>\$260,016,319</b>	<b>\$274,656,874</b>	<b>\$288,891,196</b>	<b>\$302,315,074</b>	<b>\$320,347,200</b>	<b>\$332,934,307</b>	<b>\$344,341,485</b>	<b>37%</b>

(1) Includes state grants, scholarships, and work study



**University of Idaho**  
**Sources and Uses of Ongoing Funds**

a		b	c	d	e	f	g	h	i	i vs b
		2006	2007	2008	2009	2010	2011	2012	2013	
		Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	% Change
<b>Revenues by Source:</b>										
1	Approp: General Funds	\$114,000,200	\$120,350,000	\$126,053,100	\$130,916,100	\$124,207,900	\$102,473,100	\$99,891,100	\$104,793,100	-8%
2	Approp: Federal Stimulus	-	-	-	-	5,320,600	1,513,100	-	-	0%
3	Approp: Endowment Funds	6,314,000	4,859,600	4,853,000	5,307,300	6,164,400	6,164,400	6,164,400	6,466,800	2%
4	Approp: Student Fees	38,737,000	40,956,300	39,755,400	40,948,900	45,653,000	58,422,800	67,004,730	71,428,200	84%
5	Institutional Student Fees	12,241,396	12,938,400	12,851,500	15,100,300	16,279,600	16,514,700	16,569,000	17,926,600	46%
6	Federal Grants & Contracts	99,966,700	98,064,100	106,582,900	117,534,200	131,373,900	152,535,500	155,156,700	61,180,500	-39%
7	Federal Student Financial Aid								93,624,600	100%
8	State Grants & Contracts (2)	9,600,000	10,445,700	11,649,000	9,373,200	5,672,500	5,255,200	4,881,800	5,163,300	-46%
9	Private Gifts, Grants & Contr	21,481,525	23,131,525	22,364,325	25,713,300	23,757,100	19,914,200	18,139,900	18,558,400	-14%
10	Sales & Serv of Educ Act	32,619,500	33,733,400	46,151,400	30,586,500	30,473,400	30,459,500	24,017,600	17,266,500	-47%
11	Sales & Serv of Aux Ent	32,911,179	32,578,575	34,080,385	34,199,300	34,999,600	39,162,600	36,091,700	37,530,400	14%
12	Indirect Costs/Other	11,239,800	10,577,100	10,695,690	18,569,800	18,762,300	20,934,200	17,638,070	17,732,800	58%
13	<b>Total Revenues</b>	<b>\$379,111,300</b>	<b>\$387,634,700</b>	<b>\$415,036,700</b>	<b>\$428,248,900</b>	<b>\$442,664,300</b>	<b>\$453,349,300</b>	<b>\$445,555,000</b>	<b>\$451,671,200</b>	<b>19%</b>
14										
<b>Expenditures by Function</b>										
16	Instruction	\$87,769,191	\$96,354,214	\$99,357,680	\$99,274,538	\$94,752,796	\$94,092,371	\$96,773,742	\$96,847,048	10%
17	Research	85,945,821	83,192,118	89,093,982	79,583,577	76,425,138	79,459,661	70,333,066	71,178,677	-17%
18	Public Service	20,923,357	23,473,500	29,259,100	27,589,351	31,426,724	31,565,877	28,069,242	27,683,100	32%
22	Academic Support	12,094,574	12,868,570	15,972,232	16,833,129	14,393,349	14,363,064	15,326,781	15,547,604	29%
19	Library	7,455,866	7,750,978	7,940,553	8,267,702	8,220,580	7,840,734	8,001,488	8,795,223	18%
20	Student Services	10,806,744	11,418,175	12,519,033	9,371,106	8,647,739	10,384,949	12,332,858	12,525,006	16%
21	Institutional Support	30,792,442	34,455,803	37,728,185	35,397,800	36,563,262	36,998,463	32,786,254	33,010,401	7%
22	Physical Plant	20,458,277	26,534,082	31,917,175	28,670,636	27,406,419	27,845,934	27,737,523	27,195,047	33%
23	Scholarships/Fellowships	52,538,013	48,193,989	47,203,780	76,068,868	83,854,362	95,965,062	105,082,386	13,965,734	-73%
24	Federal Student Financial Aid								93,624,600	100%
25	Auxiliary Enterprises (3)	39,544,882	32,002,928	33,099,076	34,460,919	37,284,100	38,768,100	33,383,000	34,436,000	-13%
26	Athletics (1)	10,504,469	11,102,793	12,144,504	13,086,274	13,213,731	14,181,585	14,077,060	15,057,460	43%
27	Other	0	0	0	0	10,000,000	0	0	0	0%
28										
29	<b>Total Bdgt by Function</b>	<b>\$378,833,636</b>	<b>\$387,347,150</b>	<b>\$416,235,300</b>	<b>\$428,603,900</b>	<b>\$442,188,200</b>	<b>\$451,465,800</b>	<b>\$443,903,400</b>	<b>\$449,865,900</b>	<b>19%</b>

(1) The General Education program supports intercollegiate athletics, which is an auxiliary enterprise. General Education support for athletics is reported in the General Education column, not the auxiliary enterprise column.

(2) Includes state grants, scholarships, and work study

(3) Auxiliary Enterprises includes University of Idaho's Student Recreation Center



**Lewis-Clark State College  
Sources and Uses of Funds**

a		b	c	d	e	f	g	h	i	i vs b
		2006	2007	2008	2009	2010	2011	2012	2013	
		Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	% Change
<b>Revenues by Source:</b>										
1	Approp: General Funds	\$15,370,214	\$16,477,128	\$17,705,294	\$20,274,434	\$17,466,667	\$15,662,278	\$15,105,778	\$16,580,897	8%
2	Approp: Federal Stimulus	-	-	-	-	837,300	238,200	-	-	0%
3	Approp: Endowment Funds	1,602,800	1,067,800	1,155,000	1,267,000	1,330,700	1,330,700	1,330,700	1,335,000	-17%
4	Approp: Student Fees	7,315,400	7,849,600	8,146,700	8,533,800	9,516,900	10,782,400	11,742,400	12,287,000	68%
5	Institutional Student Fees	3,933,800	5,007,500	4,962,800	5,016,000	5,002,200	5,140,600	5,377,700	5,012,100	27%
6	Federal Grants & Contracts	13,773,300	13,792,600	14,700,000	15,800,000	21,000,000	24,400,000	24,200,000	500,000	-96%
7	Federal Student Financial Aid								26,000,000	100%
8	State Grants & Contracts (3)	2,108,300	2,738,100	2,400,000	2,400,000	3,000,000	3,000,000	3,000,000	2,700,000	28%
9	Private Gifts, Grants & Contr	2,538,600	1,839,500	2,000,000	1,900,000	1,600,000	1,800,000	2,000,000	2,000,000	-21%
10	Sales & Serv of Educ Act	1,322,100	1,400,000	1,400,000	1,500,000	1,300,000	1,200,000	1,300,000	1,300,000	-2%
11	Sales & Serv of Aux Ent	2,048,300	1,548,700	2,556,686	2,452,641	2,609,200	2,335,972	2,393,100	2,535,000	24%
12	Indirect Costs/Other	968,800	1,396,200	1,150,000	1,050,000	700,000	800,000	728,400	700,000	-28%
13	<b>Total Revenues</b>	<b>\$50,981,614</b>	<b>\$53,117,128</b>	<b>\$56,176,480</b>	<b>\$60,193,875</b>	<b>\$64,362,967</b>	<b>\$66,690,150</b>	<b>\$67,178,078</b>	<b>\$70,949,997</b>	<b>39%</b>
14										
<b>Expenditures by Function</b>										
16	Instruction	\$17,507,249	\$18,753,631	\$18,832,271	\$21,001,419	\$20,485,904	\$20,406,330	\$20,042,376	\$20,498,813	17%
17	Research	150,201	322,518	353,001	336,461	198,600	169,097	192,270	198,442	32%
18	Public Service	2,387,500	2,815,371	2,515,171	2,318,362	1,864,713	1,534,654	1,902,957	2,098,022	-12%
22	Academic Support	2,720,481	2,876,467	2,941,340	2,995,607	2,823,850	2,466,281	2,556,546	2,720,286	0%
19	Library	1,006,113	966,007	1,012,562	1,035,219	1,063,412	1,051,475	1,050,537	1,074,713	7%
20	Student Services	2,721,922	2,898,079	3,254,237	3,461,897	3,172,369	3,592,580	3,706,933	3,771,905	39%
21	Institutional Support	3,878,651	4,346,866	4,719,551	5,289,055	5,189,876	4,722,704	4,817,989	4,906,075	26%
22	Physical Plant	3,522,411	3,242,254	3,611,062	3,323,155	3,034,043	2,981,637	2,884,770	3,061,641	-13%
23	Scholarships/Fellowships	12,108,300	11,878,800	12,740,700	13,950,200	19,743,600	23,457,400	23,903,200	244,500	-98%
24	Federal Student Financial Aid								26,000,000	100%
25	Auxiliary Enterprises (2)	2,507,000	2,096,435	2,984,615	2,919,355	2,904,700	2,809,150	2,819,400	2,987,700	19%
26	Athletics (1)	1,894,200	2,011,500	2,279,599	2,337,000	2,231,800	2,305,000	2,303,100	2,380,600	26%
27	Other	390,486	277,400	237,100	1,020,367	837,300	238,200	0	65,000	-83%
28									0	
29	<b>Total Bdgt by Function</b>	<b>\$50,794,514</b>	<b>\$52,485,328</b>	<b>\$55,481,209</b>	<b>\$59,988,097</b>	<b>\$63,550,167</b>	<b>\$65,734,508</b>	<b>\$66,180,078</b>	<b>\$70,007,697</b>	<b>38%</b>

(1) General Education program supports intercollegiate athletics which is an auxiliary enterprise and reported in the General Education column not the auxiliary enterprise column.

(2) Auxiliary Enterprises includes University of Idaho's Kibbie Dome operations

(3) Includes state grants, scholarships, and work study



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**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**SUBJECT**

Grants and Contracts, Board Policy, Section V.N. – first reading

**REFERENCE**

February 2012

Board approved 2<sup>nd</sup> reading of policy revisions clarifying F&A Indirect Cost Recovery provisions.

**APPLICABLE STATUTES, RULE OR POLICY**

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

**BACKGROUND / DISCUSSION**

In February 2012 the Board approved revisions to clarify policy provisions for facilities and administrative (F&A) indirect cost recovery for the Board Office and the agencies under the Board. The revisions inadvertently omitted reference to the State Department of Education (SDE).

**IMPACT**

The indirect cost recovery rate for grants and contracts with or administered by SDE would be 20%, unless the contract amount is less than or equal to \$50,000, in which case no indirect cost recovery would be allowed.

**ATTACHMENTS**

Attachment 1 –Board Policy V.N.

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends approval

**BOARD ACTION**

I move to approve the first reading of Board policy V.N., as presented in Attachment 1.

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



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**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**Attachment 1**

**SECTION: V. FINANCIAL AFFAIRS**

**Subsection: N. Grants and Contracts**

**February-December 2012**

---

**1. Approval of Grant and Contract Applications**

All applications for grants and contracts in excess of one million dollars (\$1,000,000) that require the institution or agency to dedicate current funds or facilities or will obligate the institution or agency or state to dedicate future funding or facilities require approval by the executive director. Cost sharing or other types of in-kind matching requirements are not considered as dedicated commitments. If there is no dedicated funding or facilities obligation, the application may be approved by the chief executive officer of the institution or agency or his or her designee. When requests for approval of such applications are presented to the executive director the following information shall be included:

- a. Agency to which application is made.
- b. Amount of the proposal.
- c. Period of the grant or contract.
- d. Purpose of the grant or contract.
- e. Nature of obligations including amount of funds involved or facilities to be committed.

**2. Acceptance of Grants and Contracts**

Grants and contracts accepted by an institution or agency shall be reported to the Board in August of each year, when the amount of the grant or contract award exceeds one million dollars (\$1,000,000). The following information must be provided:

- a. Name of grantor or contract.
- b. Amount of the grant or contract.
- c. Grant or contract period.
- d. Purpose of the grant or contract.
- e. Indicate nature of institution or agency's obligations in the form of dedicated funding or dedication of significant facilities.



Idaho State Board of Education  
**GOVERNING POLICIES AND PROCEDURES**

Attachment 1

SECTION: V. FINANCIAL AFFAIRS

Subsection: N. Grants and Contracts

February-December 2012

3. Facilities and Administrative Indirect Cost Recovery

a. The following indirect cost recovery rates will be used by institutions and agencies under the governance of the Board for grant and contract services:

i. For grants and contracts with the federal government:

- 1) The indirect cost recovery rates are those negotiated between the institution or agency and the federal government.
- 2) The indirect cost recovery rate may vary from one classification (e.g. research, instruction, public service/outreach, etc.) to another, but institutions and agencies are encouraged to maximize indirect cost recovery rates.
- 3) Institutions or agencies may accept indirect cost recovery rates below the institution's/agency's negotiated rate when federal laws, federal programs or policies of the federal agencies limit the rate.

ii. For state grants and contracts with or administered by the Office of the State Board of Education, the Division of Professional-Technical Education, or the Division of Vocational Rehabilitation, no indirect cost recovery is allowed.

~~ii.~~iii. For state grants and contracts with or administered by the State Department of Education, the indirect cost recovery rate is twenty percent (20%); provided however, if a grant or contract is less than or equal to \$50,000, no indirect cost recovery is allowed.

~~iii.~~iv. Except as otherwise provided ~~above in this Subsection~~, for grants and contracts with a State of Idaho office, department, agency, authority, commission, board, institution, hospital, college, university or other instrumentality thereof, the indirect cost recovery rate is twenty percent (20%) of the total direct cost; provided however, if the funding is federal pass-through, then paragraph ~~(1)~~i. applies.

~~iv.~~v. For grants and contracts with any political subdivision of the State of Idaho as defined in Idaho Code §6-902(2):

- 1) the indirect cost recovery rate is no less than twenty percent (20%) of the total direct cost unless the funding is federal pass through;
- 2) If the funding is federal pass-through, then paragraph ~~(1)~~i. applies.

~~v.~~vi. For grants and contracts with private entities, whether for-profit or non-profit, indirect cost recovery shall be charged at the full indirect cost recovery rate proposed to the federal government at the last rate negotiation which represents the institution's full cost of doing business.

b. Reduction or Waiver of Cost Recoveries



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**Attachment 1**

**SECTION: V. FINANCIAL AFFAIRS**

**Subsection: N. Grants and Contracts**

**February-December 2012**

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- i. Notwithstanding the indirect cost recovery rates established above, for good cause, the chief executive officer or his or her designee of the institution or agency is authorized to reduce or waive indirect cost recoveries.
- ii. Discretionary reductions or waivers of indirect costs must be reported to the Board office in August of each year.

**4. Restrictions on Contract Services**

- a. Research or consultant entities of agencies and institutions under the governance of the Board may not bid on contract services when it appears that the contract services are reasonably available from the private sector.
- b. If the product of contract work is to be privileged or its dissemination restricted, the agency or institution may not undertake the contract work without the written approval of the chief executive officer of the agency or institution.



**GOVERNING POLICIES AND PROCEDURES**

SECTION: V. FINANCIAL AFFAIRS

Subsection: N. Grants and Contracts

~~February~~ December 2012

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**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**SUBJECT**

Budget Policies V.B. – second reading

**REFERENCE**

April 2010

Board adopted Occupancy Costs policy

August 2012

Board approved 1<sup>st</sup> reading of amendments to Board policy V.B.

**APPLICABLE STATUTES, RULE OR POLICY**

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

**BACKGROUND / DISCUSSION**

In 2010, the Board codified a 2008 Joint Finance Appropriations Committee (JFAC)-developed policy to define terms and document the formula used to calculate occupancy costs. Since that time, staff has worked with JFAC staff to identify several sections of the policy which are in need of clarification, and to recommend revisions. The revisions are summarized below:

- 1) No notification is required for capital projects that are named in the Permanent Building Fund appropriation bill; however, for projects in the lump sum alterations and repair category of the Permanent Building Fund appropriation bill, notification according to the policy procedures is required.
- 2) Only the space of an existing facility that was expanded, remodeled, or converted should become eligible for occupancy costs, rather than the entire facility.
- 3) If an institution leases facility space to another entity, only the non-leased or owner-occupied space or replacement cost of the facility would be eligible for occupancy costs.
- 4) Once an institution has taken occupancy of the facility, or the remodeled or expanded area, the institution would provide verification to the Legislative Services Office and the Division of Financial Management of the gross square footage, construction costs, current replacement value, and current or proposed leased space.
- 5) Notification period would be extended from 10 business days to 30 calendar days from time of project approval.

**IMPACT**

Approval of revisions will constitute final adoption.

**ATTACHMENTS**

Attachment 1 – Second reading policy V.B.

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

There were no changes from the first reading. Staff recommends approval.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**BOARD ACTION**

I move to approve the second reading of the proposed amendments to Board Policy V.B., as presented in attachment 1.

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



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**ATTACHMENT 1**

**SECTION: V. FINANCIAL AFFAIRS**

**Subsection: B. Budget Policies**

**October 2012**

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**1. Budget Requests**

For purposes of Items 1. and 10., the community colleges (CSI, CWI and NIC) are included.

**a. Submission of Budget Requests**

The Board is responsible for submission of budget request for the institutions, school and agencies under its governance to the executive and legislative branches of government. Only those budget requests which have been formally approved by the Board will be submitted by the office to the executive and legislative branches.

**b. Direction by the Office of the State Board of Education**

The preparation of all annual budget requests is to be directed by the Office of the State Board of Education which designates forms to be used in the process. The procedures for the preparation and submission of budget requests apply to operational and capital improvements budgets.

**c. Preparation and Submission of Annual Budget Requests**

Annual budget requests to be submitted to the Board by the institutions, school and agencies under Board governance are due in the Office of the State Board of Education on the date established by the Executive Director.

**d. Presentation to the Board**

Annual budget requests are formally presented to the designated committee by the chief executive officer of each institution, school or agency or his or her designee. The designated committee will review the requests and provide recommendations to the Board for their action.

**2. Budget Requests and Expenditure Authority**

a. Budget requests must include projected miscellaneous receipts based on the enrollment of the fiscal year just completed (e.g., the FY 2003 budget request, prepared in the summer of 2001, projected miscellaneous receipts revenue based on academic year 2001 enrollments which ended with the Spring 2001 semester).

b. Approval by the Executive Director, or his or her designee, as authorized, for all increases and decreases of spending authority caused by changes in miscellaneous receipts is required.



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**ATTACHMENT 1**

**SECTION: V. FINANCIAL AFFAIRS**

**Subsection: B. Budget Policies**

**October 2012**

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- c. Miscellaneous receipts collected by an institution will not be allocated to another institution. The lump sum appropriation will not be affected by changes in receipts.

**3. Operating Budgets (Appropriated)**

**a. Availability of Appropriated Funds**

- i. Funds appropriated by the legislature from the State General Account for the operation of the institutions, school and agencies (exclusive of funds for construction appropriated to the Permanent Building Fund) become available at the beginning of the fiscal year following the session of the legislature during which the funds are appropriated, except when appropriation legislation contains an emergency clause.
- ii. These funds are generally allotted periodically or are disbursed on submission of expenditure vouchers to the Office of the State Controller.

**b. Approval of Operating Budgets**

- i. The appropriated funds operating budgets for the institutions, school and agencies under Board supervision are based on a fiscal year, beginning July 1 and ending on June 30 of the following year.
- ii. During the spring of each year, the chief executive officer of each institution, school or agency prepares an operating budget for the next fiscal year based upon guidelines adopted by the Board. Each budget is then submitted to the Board in a summary format prescribed by the Executive Director for review and formal approval before the beginning of the fiscal year.

**c. Budget Transfers and Revisions**

**i. Chief Executive Officer Approval**

- ii. The chief executive officer of each institution, agency, school, office, or department is responsible for approving all budget transfers.

**iii. Allotment and Allotment Transfers**

- iv. Requests for allotments or changes in allotments are submitted by the institution, school or agency to the Division of Financial Management and copies provided concurrently to the Office of the State Board of Education. (Refer to allotment form in the Fiscal Reference Manual of the Division of Financial Management.) The Office of the State Board of Education will coordinate the request for allotments and changes to allotments for the college and universities.



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**ATTACHMENT 1**

**SECTION: V. FINANCIAL AFFAIRS**

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**October 2012**

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**4. Operating Budgets (Non-appropriated -- Auxiliary Enterprises)**

**a. Auxiliary Enterprises Defined**

An auxiliary enterprise directly or indirectly provides a service to students, faculty, or staff and charges a fee related to but not necessarily equal to the cost of services. The distinguishing characteristic of most auxiliary enterprises is that they are managed essentially as self-supporting activities, whose services are provided primarily to individuals in the institutional community rather than to departments of the institution, although a portion of student fees or other support is sometimes allocated to them. Auxiliary enterprises should contribute and relate directly to the mission, goals, and objectives of the college or university. Intercollegiate athletics and student health services should be included in the category of auxiliary enterprises if the activities are essentially self-supporting.

All operating costs, including personnel, utilities, maintenance, etc., for auxiliary enterprises are to be paid out of income from fees, charges, and sales of goods or services. No state appropriated funds may be allocated to cover any portion of the operating costs. However, rental charges for uses of the facilities or services provided by auxiliary enterprises may be assessed to departments or programs supported by state-appropriated funds.

**b. Operating Budgets**

Reports of revenues and expenditures must be submitted to the State Board of Education at the request of the Board.

**5. Operating Budgets (Non-appropriated -- Local Service Operations)**

**a. Local Service Operations Defined**

Local service operations provide a specific type of service to various institutional entities and are supported by charges for such services to the user. Such a service might be purchased from commercial sources, but for reasons of convenience, cost, or control, is provided more effectively through a unit of the institution. Examples are mailing services, duplicating services, office machine maintenance, motor pools, and central stores.

b. The policies and practices used for appropriated funds are used in the employment of personnel, use of facilities, and accounting for all expenditures and receipts.

c. Reports of revenues and expenditures must be submitted to the State Board of Education at the request of the Board.



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**ATTACHMENT 1**

**SECTION: V. FINANCIAL AFFAIRS**

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**6. Operating Budgets (Non-appropriated -- Other)**

- a. The policies and practices used for appropriated funds are used in the employment of personnel, use of facilities, and accounting for all expenditures and receipts.
- b. Reports of revenues and expenditures must be submitted to the State Board of Education at the request of the Board.

**7. Agency Funds**

- a. Agency funds are assets received and held by an institution, school or agency, as custodian or fiscal agent for other individuals or organizations, but over which the institution, school or agency exercises no fiscal control.
- b. Agency funds may be expended for any legal purpose prescribed by the individual or organization depositing the funds with the institution, school or agency following established institutional disbursement procedures.

**8. Major Capital Improvement Project -- Budget Requests**

For purposes of Item 8., the community colleges (CSI, CWI and NIC) are included, except as noted in V.B.8.b. (2).

**a. Definition**

A major capital improvement is defined as the acquisition of an existing building, construction of a new building or an addition to an existing building, or a major renovation of an existing building. A major renovation provides for a substantial change to a building. The change may include a remodeled wing or floor of a building, or the remodeling of the majority of the building's net assignable square feet. An extensive upgrade of one (1) or more of the major building systems is generally considered to be a major renovation.

**b. Preparation and Submission of Major Capital Improvement Requests**

**i. Permanent Building Fund Requests**

Requests for approval of major capital improvement projects to be funded from the Permanent Building Fund are to be submitted to the Office of the State Board of Education on a date and in a format established by the Executive Director. Only technical revisions may be made to the request for a given fiscal year after the Board has made its recommendation for that fiscal year. Technical revisions must be made prior to November 1.

**ii. Other Requests**



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

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**SECTION: V. FINANCIAL AFFAIRS**

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**October 2012**

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Requests for approval of major capital improvement projects from other fund sources are to be submitted in a format established by the Executive Director. Substantive and fiscal revisions to a requested project are resubmitted to the Board for approval. This subsection shall not apply to the community colleges.

**c. Submission of Approved Major Capital Budget Requests**

The Board is responsible for the submission of major capital budget requests for the institutions, school and agencies under this subsection to the Division of Public Works. Only those budget requests which have been formally approved by the Board will be submitted by the office to the executive and legislative branches.

**9. Approval by the Board**

Requests for approval of major capital improvement projects must be submitted for Board action. Major capital improvement projects, which are approved by the Board and for which funds from the Permanent Building Fund are requested, are placed in priority order prior to the submission of major capital budget requests to the Division of Public Works.

**10. Occupancy Costs.**

**a. Definitions.**

- i. "Auxiliary Enterprise" is an entity that exists to furnish goods or services to students, faculty, or staff, and that charges a fee directly related to the cost of the goods or services.
- ii. "Eligible Space" means all owner-occupied space other than auxiliary enterprise space. Space owned by an institution but leased to another entity is not eligible space. Occupancy costs for "common use" space (i.e. space which shares eligible and auxiliary enterprise space) will be prorated based on its use. When funds are used to expand, remodel, or convert existing space, the eligible space shall be limited to square footage of the expanded, remodeled or converted space, only.
- iii. "Gross Square Feet" (GSF) means the sum of all areas on all floors of a building included within the outside faces of its exterior walls.
- iv. "Occupancy costs" means those costs associated with occupying eligible space including custodial, utility, maintenance and other costs as outlined in the occupancy costs formula.



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**ATTACHMENT 1**

**SECTION: V. FINANCIAL AFFAIRS**

**Subsection: B. Budget Policies**

**October 2012**

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**b. Notification of New Eligible Space.**

- i. No institution shall acquire, build, take possession of, expand, remodel, or convert any eligible space for which occupancy costs will be requested unless prior written notification has been provided to the Division of Financial Management (DFM) and the Legislative Services Office, Budget and Policy Analysis Division (LSO-BPA). Written notification shall be provided to DFM and LSO-BPA by the approving entity or institution within thirty (30) calendar days of final project approval by:
  - 1) the State Board of Education or its executive director,
  - 2) the vice-president for finance and administration (or functional equivalent) in the case of a locally approved project, or
  - 3) a community college board of trustees.

Written notification shall include:

- 1) description of the eligible space, its intended use, and how it relates to the mission of the institution;
  - 2) estimated cost of the building or facility, and source(s) of funds;
  - 3) estimated occupancy costs; and
  - 4) estimated date of completion.
- ii. A facility or project specifically identified by name and approved by the Legislature and the Governor in the capital projects category of the Permanent Building Fund appropriation bill satisfies the notice requirement for purposes of requesting occupancy costs. All other facilities and projects for which occupancy costs may be requested shall follow the notification requirements of this policy.

- c. **Sources of Funds.** Institutions may request occupancy costs regardless of the source(s) of funds used to acquire or construct eligible space.
- d. **Required Information.** Requests for occupancy costs shall include the following information: (i) projected date of occupancy of the eligible space; (ii) gross square feet of eligible space; and (iii) number of months of the fiscal year the eligible space will be occupied (i.e. identify occupancy of eligible space for a full or partial fiscal year).
- e. Once an institution has taken occupancy of a facility, or the remodeled or expanded area of a facility, the institution shall provide verification to DFM and LSO-BPA of the gross square footage, construction costs, current replacement value, and, if applicable, current or proposed lease space.
- f. **Occupancy Costs Formula.**



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**ATTACHMENT 1**

**SECTION: V. FINANCIAL AFFAIRS**

**Subsection: B. Budget Policies**

**October 2012**

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- i. Custodial: For the first 13,000 GSF and in 13,000 GSF increments thereafter, one-half (.50) custodial FTE. In addition, 10¢ per GSF may be requested for custodial supplies.
- ii. Utility Costs: \$1.75 per GSF.
- iii. Building Maintenance: 1.5% of the construction costs, excluding pre-construction costs (e.g. architectural/engineering fees, site work, etc.) and moveable equipment.
- iv. Other Costs:
  - 1) 77¢ per GSF for information technology maintenance, security, general safety, and research and scientific safety;
  - 2) .0005 current replacement value for insurance; and
  - 3) .0003 current replacement value for landscape maintenance.
- v. The formula rates may be periodically reviewed against inflation.
- vi. Reversions.
  - 1) If eligible space which received occupancy costs is later:
    - a) razed and replaced with non-eligible space; or
    - b) converted to non-eligible space,then the institution shall revert back to the state the occupancy cost funding at the base level originally funded.
  - 2) If eligible space is razed and replaced with new eligible space, then the institution may retain the base occupancy costs, net the funded GSF against any additional GSF, and request funding for the difference.
- g. Unfunded Occupancy Costs. If occupancy costs for eligible space have been requested but not funded due to budgetary reasons, institutions may request occupancy costs again in the following year. If, however, occupancy costs are denied for non-budgetary reasons, no further requests for occupancy costs related to the space in question will be considered.



**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**

**SECTION: V. FINANCIAL AFFAIRS**

**Subsection: B. Budget Policies**

**ATTACHMENT 1**

**October 2012**

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**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
**OCTOBER 18, 2012**

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**BOISE STATE UNIVERSITY**

**SUBJECT**

Update on Dependent Fee Waiver Pilot Program

**REFERENCE**

December 2010

Board approved request to implement  
pilot dependent fee waiver program

**APPLICABLE STATUTE, RULE, OR POLICY**

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

**BACKGROUND/DISCUSSION**

In fall 2011 Boise State University implemented a Board-approved dependent fee waiver pilot program for a two year period. Pilot program eligibility and benefits follow:

Eligibility

- Dependent child of a permanent Boise State employee who has completed at least five months of benefits-eligible service with the University and who is scheduled to work at least 20 hours per week.
- Dependent child is defined as a child who is: under age 26 as of the first day of the semester, is unmarried, and has lived with and been supported by the employee for at least half the year. A child is a son, daughter, stepchild, adopted child, child placed for adoption, or foster child.
- Only one dependent fee waiver for one child will be allowed per semester per family. If both parents work for the University, only one will be permitted to utilize the fee waiver, unless the parents are legally separated or divorced.

Benefits

- The dependent fee waiver benefit will apply to tuition and fees for either a part-time schedule, or a regular full-time class load, as defined by the University. Overload credits are not eligible for the fee waiver.
- Eligible dependents may be enrolled in either undergraduate or graduate classes, but they must be admitted under regular academic provisions; the fee waiver does not guarantee acceptance to the University.
- The cost to the enrolled dependent under the fee waiver is a \$25 registration fee and 35 percent of the regular applicable resident or non-resident tuition and fees.



**BUSINESS AFFAIRS AND HUMAN RESOURCES  
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**IMPACT**

At the time of implementation, the number of current students who were qualifying dependents of University employees was unknown. Over 75 percent of the 1,969 benefit-eligible employees at that time were between the ages of 35 and 65 and could potentially have had college-aged children. Estimated cost projections were developed using the assumption that 20 percent of eligible employees would take advantage of the fee waiver, or 394 dependent children at an annual cost of \$886,071.

In the program's first year, including fall 2011, spring 2012, and summer 2012 terms, 168 dependent children utilized the benefit at a total cost to the University of \$265,950. A total of 882 employees, spouses, dependents and affiliate employees or spouses utilized the fee waiver benefit in 2011-2012, representing an average of 1.9 percent of the undergraduate student enrollment.

Additional usage data follows:

- The number of employees utilizing the employee fee waiver in FY12 declined by 14 percent from FY11; spouse fee waivers declined by 13 percent.
- Average number of credit hours for employees and spouses was unchanged at five and six hours, respectively, per person.
- The majority of employees with dependents utilizing the fee waiver were professional staff employees (45 percent), followed by faculty (36 percent) as the next highest group.

<b>Employee Classification</b>	<b>FY12 Total Number</b>	<b>FY12 Total percent</b>
Academic Other	5	3%
Classified	27	16%
Faculty	60	36%
Professional	76	45%
Total	168	

- Most employees with dependents utilizing the fee waiver were longer service employees, with 52 percent with over 10 years of service, 32 percent with 5 – 10 years of service, and the remaining 17 percent with less than five years of service. Only three of the 84 employees utilizing the dependent fee waiver in the fall of 2011 have subsequently terminated from the University.
- A total of 168 students utilized the dependent fee waiver in FY12. This represented .87 percent of total undergraduate student enrollment for the fall and spring semesters. All were undergraduate students, with a distribution by class year as follows:



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**Percentage by Class Rank**

Freshman  
Sophomores  
Juniors  
Seniors  
Post-Bac Undergrad

Fall 2011	Spring 2012	Summer 2012
44%	31%	25%
31%	28%	25%
14%	21%	30%
10%	16%	15%
1%	3%	5%

- Of the students utilizing the dependent fee waiver, 22 percent were from under-represented ethnic groups, and 107 (64 percent) are receiving financial aid.
- Students utilizing the dependent fee waiver enrolled in an average of 13 credits per semester, and had an average course completion rate of 85 percent. Students were pursuing degrees/courses of study in 59 different majors.

Human Resource Services surveyed employees with dependents utilizing the fee waiver and found that the primary reasons cited for selection of Boise State University included location (78 percent) and academic field of study (43 percent).

Given that University faculty and staff expressed strong support for the continuation of this highly valued benefit, the University intends to seek Board approval to make the dependent fee waiver permanent. However, this will necessitate a change to Board policy. Recognizing the importance of giving each institution the flexibility to set its own Board-approved employee, spouse and dependent fee waiver rates, the University suggests that the revised policy allow for 1) the dependent fee in addition to the employee and spouse fee, and 2) provide for institutional flexibility in determining the fees charged and the eligibility requirements.

**STAFF COMMENTS AND RECOMMENDATIONS**

At its June 2012 meeting the Board waived Board policy V.R.3. and approved the request by the University of Idaho to create a Dependent Tuition and Fee Benefit. Staff requests guidance from the Board whether to bring a policy revision at the next regularly scheduled meeting to allow for a Dependent Fee.

**BOARD ACTION**

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



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**BOISE STATE UNIVERSITY**

**SUBJECT**

Boise State University Hotel

**APPLICABLE STATUTE, RULE OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.I.5.b(1).

**BACKGROUND/DISCUSSION**

Boise State University welcomes thousands of visitors to campus each year. Many of these visitors, including prospective employees, students and their families, visiting athletic and club sports teams and spectators, guest speakers and patrons of various campus venues travel to Boise from outside the Treasure Valley and require hotel accommodations.

The University is currently served by local hotels, a few of which are within reasonable walking distance to campus, but none of which provide the convenience and unique experience of staying on campus, nor a formal association with the University.

The University plans to issue a Request for Information (RFI) and qualifications to select one or more hotel development firms to negotiate the development of a campus hotel. The purpose of the negotiations is to identify the major points of a development agreement, ground lease and project pro forma. Through post-RFI negotiations, a single firm will be selected for the development, subject to Board approval. The campus hotel will be privately developed, owned and operated.

Through review of the competitive development proposals, the University will select the most appropriate proposal and firm based on a minimal or no impact to the university credit profile, university preferences on hotel location, financial benefit to the university, and a qualitative review of the developer's experience, branding, references, and willingness to adhere to campus design guidelines.

The University will provide campus property for the development of the hotel through a market-based ground lease. The University will not guarantee the debt, participate in any manner in the financing/funding of this project nor guarantee occupancy levels of the campus hotel.

**IMPACT**

This is an excellent opportunity for the University to partner with a highly qualified private partner to develop a unique campus amenity. A campus hotel will provide guests of the University a unique on-campus hospitality experience, convenience to campus destinations, campus economic development and student employment opportunities. Additionally, the ability to bundle hotel



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
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accommodations with Student Union Conference Services, Bronco Stadium, Morrison Center and Taco Bell Arena events presents an opportunity to augment and enhance our campus venues.

Several universities have recently completed successful bids for hotel developments. The University's real estate services department is in contact with these universities and has had the opportunity to review the public bid documents and development agreements. The University believes there will be enough interest in this project to generate a number of qualified competitive proposals to review.

**STAFF COMMENTS AND RECOMMENDATIONS**

The Board may want to consider the following questions in relation to this proposed project:

1. Is the project, to be sited on university property, consistent with the university's Board-approved campus master plan?
2. Where would the proposed hotel be sited on campus?
3. Will the RFI reference a specific term or range for the ground lease?
4. Will the RFI contemplate any revenue or profit sharing with the university?
5. Explain why it is anticipated this project would have minimal to no impact on the university's credit rating.
6. Are there or should there be concerns about this project competing with existing private lodging businesses?

**BOARD ACTION**

This is an information item only. Any action will be at the Board's discretion.



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**UNIVERSITY OF IDAHO**

**SUBJECT**

Easement to local utility provider for very small parcel at the University of Idaho's Arboretum in Moscow

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.I.5.b(2)

**BACKGROUND/DISCUSSION**

Avista Corporation, the local utility provider, is requesting use of 150 sf (below grade) of Regents' property to install a cathodic well. The proposed well is needed as part of a utility infrastructure that provides corrosion protection for the utility's natural gas lines. The subject property adjoins a public road right of way and is located in a vacant field near the University of Idaho Arboretum's lower parking lot.

**IMPACT**

The University will not receive payment and the easement improvements will not interfere with current or planned UI uses in that area.

**ATTACHMENTS**

Attachment 1 – Proposed Easement

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends approval.

**BOARD ACTION**

I move to approve the request by the University of Idaho for authority to grant an easement to Avista Corporation in substantial conformance to the form submitted to the Board in Attachment 1, and to authorize the University's Vice President for Finance and Administration to execute the easement and any related transactional documents.

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



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Return Address

Avista Corporation  
 Real Estate Department  
 P.O. Box 3727  
 Spokane, Washington 99220-3727  
 Attn: Randy Daniels MSC R10

**CATHODIC WELL**  
**RIGHT OF WAY EASEMENT**

For Mutual Benefits and Good Consideration, the receipt of which is hereby acknowledged, **THE REGENTS OF THE UNIVERSITY OF IDAHO**, "Grantor" hereby grants, conveys and warrants to **AVISTA CORPORATION**, a Washington corporation "Grantee", a 10 foot wide x 15 foot long non-exclusive easement on, over, under, along and across the southern portion of a parcel located at 1200 W Palouse River Dr. also identified as Assessor's Parcel No. RPM00000186015 located in the NW ¼ of the NW ¼ of Section 19, Township 39 North, Range 5 West, B.M., Latah County, State of Idaho:

1. **PURPOSE.** Grantee shall have the right to drill, install, inspect, operate, protect, maintain, repair, and remove, **One Cathodic Protection Well Head**, "facilities", on, under, along, over and across the herein described property, together with all necessary facilities and appurtenances. All facilities including the well head and appurtenances shall be installed below the existing grade of the aforementioned property provided that certain metal and/or concrete covers may be installed over the facilities to allow access, repair, inspection, and maintenance of the well head facilities. **The map showing the approximate location is attached as EXHIBIT "A" and by this reference made a part hereof.**
2. **ACCESS AND DAMAGE.** Grantee shall have access over and across the above described property and the adjoining property of the Grantor for the purpose of the installation, repair and maintenance of said facilities, provided the Grantee repairs damages or compensates the Grantor for any damage to said properties as a result of such access and repair and maintenance.
3. **GRANTOR'S USE OF THE PROPERTY.** Grantor reserves the right to the use and enjoyment of the property described herein, but such use shall not conflict or interfere with the Grantee's rights herein granted. Grantor shall not construct, place or maintain any building or structures that would interfere with the maintenance or safe operation of said facilities or that are not in compliance with all safety and building codes, regulations and laws.
4. **INDEMNITY.** The Grantee agrees to defend, indemnify and hold harmless the Grantor from any and all claims for damages suffered by Grantor during the drilling, installation, operation, maintenance, repair, inspection, and removal of said facilities including Grantor's agents, guests and employees which may be caused by Grantee's negligence in the exercise of the rights herein granted, provided, that the Grantee shall not be responsible to Grantor or Grantor's agents, guests or employees for any damages or injury to any person or property caused by acts or omissions of Grantor, including Grantor's agents, guests or invitees.
5. **ENVIRONMENTAL CONDITIONS.** Grantee shall conform its usage of the easement granted hereby to applicable environmental laws rules and regulations and shall hold harmless, indemnify and defend each Indemnified Party identified in the preceding section for all loss damage or injury or third party claim of such, arising out of any spill or release of toxic or hazardous materials on to the property covered by the easement or any adjoining property caused by Grantee or its agents during the term of this agreement.

Avista Corporation Document No. \_\_\_\_\_



6. **SUCCESSORS AND ASSIGNS.** The rights and obligations of the parties shall be for the benefit of and be binding upon their respective successors, heirs and assigns.
7. **RELOCATION.** Grantor reserves the right to, and Grantee agrees that, the Right of Access, improvements, and/or infrastructure lying on, below, or in the subject property may be relocated at the Grantor's sole option and expense.
8. **TERM.** The term of this Easement is for a period of 50 years commencing from the date signed below.
9. **DECOMMISSIONING AND ABANDONMENT OF FACILITIES.** It is further understood and agreed that when the aforementioned facilities are decommissioned and abandoned such action will be taken in compliance with all applicable city and state codes and regulations pertaining to well abandonment. Notwithstanding that said facilities may be left "as is" provided that all structures, equipment and appurtenances above a depth of 18 inches shall be removed and the property shall be left in a reasonable condition.

DATED this \_\_\_\_\_ day of \_\_\_\_\_, 2012.

**GRANTOR**

By: \_\_\_\_\_  
 Title: VICE PRESIDENT FINANCE and ADMINISTRATION

STATE OF IDAHO       )  
                                       ) ss.  
 COUNTY OF LATAH    )

I certify that I know or have satisfactory evidence that **RONALD E. SMITH** is the person who appeared before me, and said person acknowledged that he signed this instrument, on oath stated that he was authorized to execute the instrument and acknowledged it as the **VICE PRESIDENT FINANCE and ADMINISTRATION** of the University of Idaho to be the free and voluntary act of such party for the uses and purposes therein mentioned.

GIVEN under my hand and official seal this \_\_\_\_\_ day of \_\_\_\_\_ 2012.

\_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Print Name

Notary Public for the State of \_\_\_\_\_

Residing at \_\_\_\_\_

My Commission expires \_\_\_\_\_



Exhibit "A"





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**BUSINESS AFFAIRS AND HUMAN RESOURCES  
OCTOBER 18, 2012**

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**SUBJECT**

Performance-based Funding Initiative (PBFi)

**REFERENCE**

December 2011

PBFi Board work session

August 2012

Board approved systemwide metrics

**BACKGROUND / DISCUSSION**

At the August meeting the Board approved the following two Outcome Metrics for use as system-wide metrics as part of a Performance-based Funding Initiative:

(1) Graduate (i.e. total student) Production

(2) Cost per successfully completed weighted student credit hour

In addition, each institution agreed to develop up to four institution-specific metrics. Of the four, one must be a progress metric and one must be a quality metric. The remaining two metrics are discretionary. The institution-specific metrics were brought forward at the August Board meeting as an information item for Board review and comment.

**IMPACT**

Institution-specific metrics can be derived from the Board's and an institution's strategic plans, and can take into consideration each institutions' historical trends and reasonable expectations for improvement. Ultimately, institutions will be held accountable based on their performance in relation to their own metrics.

**ATTACHMENTS**

Attachment 1 – BSU Institution-Specific Metrics

Page 3

Attachment 2 – ISU Institution-Specific Metrics

Page 7

Attachment 3 – UI Institution-Specific Metrics

Page 9

Attachment 4 – LCSC Institution-Specific Metrics

Page 11

**STAFF COMMENTS AND RECOMMENDATIONS**

The next step will be for each institution to develop a baseline and benchmark for all metrics (i.e. two outcome metrics and up to four institution-specific metrics) and submit them for approval at the December Board meeting. Baselines are important to measure and incent continuous improvement, but benchmarks are needed to put the baselines in context.

The methodology to be used to award or withhold funds under the PBFi will be brought forward for Board consideration at the regularly scheduled December Board meeting.

Staff recommends approval.



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
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**BOARD ACTION**

I move to approve the institution-specific metrics as presented in Attachments 1 through 4, and to direct the institutions to develop a baseline and benchmark for all of their respective metrics (i.e. two outcome metrics and up to four institution-specific metrics) and submit them for consideration at the December Board meeting.

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



**Boise State University**  
***Proposed Metrics for Performance Based Funding***

**Outcome Measures from All Institutions:**

**→ Graduate Production (Count of Distinct Students Receiving Awards)**

Notes:

- A. Defined as the count of distinct students receiving awards during the academic year (Summer-Fall-Spring) as opposed to the count of degrees awarded. The latter measure would be inflated by students who receive multiple awards.
- B. We will disaggregate along four dimensions:
  - Resident vs. Non-resident. Reasoning: It is only if a graduate remains in Idaho after graduation that the graduation of a student helps to attain the 60% goal and helps build our workforce. We have found that although a substantial number of our non-resident graduates remain in Idaho, the proportion is higher for resident graduates.
  - Degree level (Associate's, Bachelor's, Graduate Certificate, Master's, Doctorate). Reasoning: Identifying degree level helps to identify the level of contribution to the workforce. Higher level degrees are generally associated with careers of higher skill level.
  - Underrepresented group membership (First generation, rural, low socioeconomic status, Hispanic or Native American ethnicity). Reasoning: The greatest impact on the college completion rate in the state will result from facilitating the graduation from college of individuals from groups that are historically underrepresented as college graduates.
  - Discipline of major (Graduates from high demand disciplines, including STEM). Reasoning: Graduates from majors such as those in the STEM disciplines are in greater demand than others, and are likely to have a greater impact on workforce status.

**→ Cost Per Weighted Credit Hour Successfully Completed.**

Notes:

- A. We will express this measure in two ways: (i) with cost adjusted using the Consumer Price Index, thereby providing cost in constant dollars, and (ii) with cost unadjusted.
- B. Credit hours will be weighted according disciplinary and degree-level weightings in EWA policy.
- C. "Cost" will need to be carefully and explicitly defined by the Board staff. At present it is unclear whether it will be total state appropriation, will be



limited to costs for instruction, instructional support, and student support, or will be some other definition of cost.

- D. “Successfully completed” refers to credit hours for classes for which grades of A, B, C, D, or Pass were received, excludes credit hours for which grades of I, F, NP, includes successfully complete credits for load for remedial coursework, and excludes courses that were audited.

## **Boise State University Proposed Institution-Specific Measures**

### **Measure of Quality**

#### **→ Percent of students achieving competency University Learning Outcomes (ULOs).**

Notes:

- A. Our ULOs are organized into the following four groups:
  - Written & oral communication (ULOs 1-2)
  - Critical inquiry, innovation, teamwork (ULOs 3-4)
  - Civic & Ethical foundations (ULOs 5-6)
  - Disciplinary Lens (ULO's 7-11)
- B. The specific measure we will use is the % of baccalaureate graduates who achieve a competency of “exemplary” or “good” for each of ULOs 1-6 (Intellectual foundations and Civic & ethical foundations) and for ULOs 7-11 (Disciplinary areas).
- C. Tentatively, our goal for this measure is that for each ULO, 90% of graduates will be rated as “good” or “exemplary”.

### **Measure of Progress**

#### **→ Graduates per 100 student FTE enrolled**

Notes:

- A. Defined as distinct count of graduates per 100 FTE enrolled. One FTE is defined as being enrolled for 30 credit hours per academic year (undergraduate) or 24 credit hours per year (graduate).
- B. We will report baccalaureate and master's/doctorate numbers separately.

### **Measures of Productivity**

#### **→ Externally Funded Research Expenditures**



Notes:

- A. Defined as the Total R&D Expenditures as reported to the National Science Foundation.
- B. This measure is regarded as the gold standard of measurement of research activity of a university.

➔ **Number of Graduates from Doctoral and Master's Programs**

Notes:

- A. Defined as the number of distinct graduates in an academic year.
- B. We will report the following separately:
  - Professional degrees (e.g., EdD, MPA, MBA), which contribute substantially to the professional expertise in the state.
  - Academic Degrees (e.g., PhD and MS), which are key contributors to our research and creative activity.



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**Idaho State University**

*Proposed Institution-Specific Metrics for Performance-based Funding*

1. Quality: Number of current programs reviewed and revised as needed at least once every five years; programs being added or deleted are strategic decisions and tied to student demand and the workforce needs of the state. This metric ties to the ISU Strategic Plan Objective 1.2 - ISU provides a dynamic curriculum to ensure programs are current, relevant, and meet student and workforce needs.
2. Progress: Retention rates from freshmen to sophomore and sophomore to junior years, for full-time and part-time degree-seeking students. This metric ties to the ISU Strategic Plan Objective 2.2 - Students' progression from initial enrollment to graduation is monitored, and efforts to increase enrollment and retention are in place (e.g., targeted recruitment, optimal scheduling of courses, early warning system to help students in need, etc.).



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**University of Idaho***Proposed Institution-Specific Metrics for Performance-based Funding*

Measure of Quality: Use the National Survey of Student Engagement (NSSE) measure of “Level of Academic Challenge.” This is a composite measure that sums the results of nine (9) individual questions on the NSSE survey. These questions address such topics as: hours spent preparing for class; number of books assigned; number of written papers of various lengths; class emphasis on analysis, synthesis, judgment and application of theories and concepts; and a campus environment that emphasizes spending time on study and academic work. With the continued emphasis on efficiency in the Performance Funding plan, we believe an appropriate goal for this measure is to be able to sustain our level of academic challenge at current levels.

Measure of Progress: Use our six (6) year graduation rate as a “summative” measure of progress. For a land grant institution with a significant residential program, the traditional graduation rate is an appropriate and useful measure of our ability to attract, retain, counsel and move our students through our academic programs.

Institution Measure 1: Use the number of science, technology, engineering and mathematics (STEM) degrees awarded at all levels – bachelors, masters and doctorate - as a measure of performance in the critical STEM areas. This would be similar to overall Performance Measure One, but would include graduate degrees and focus on the University’s strength in the STEM disciplines.

Institution Measure 2: Use Research Expenditures per Faculty Member as a measure of research performance. With discussions underway in Washington, D.C. that appear headed for significant budget cuts in federal research programs, we believe an appropriate (near term) goal for this measure would be to sustain our current level of funding per faculty member.



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**Lewis-Clark State College**

*Proposed Institution-Specific Metrics for Performance-based Funding*

1. Successful placement rates of academic graduates (Quality);
2. Performance on nationally-normed exams (Quality);
3. Course completion rates on college-level academic courses (Progress).
4. Fall term to fall term retention rate of all academic degree-seeking students who do not graduate (Progress)



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**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
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**SUBJECT**

FY 2014 Capital Budget Requests

**REFERENCE**

August 2012

Board approved Capital budget recommendation to  
Permanent Building Fund Advisory Council

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section V.B.8.c.

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

**BACKGROUND/DISCUSSION**

The capital projects request process is separate from the line item budget request process. The annual capital project funding request process begins with the Division of Public Works (DPW) issuing a letter to agencies and institutions each spring requesting that they submit their project funding needs. DPW staff works with the agencies and institutions over the summer months to finalize requests. The State Board of Education also concurrently reviews and makes recommendations on major capital projects to the Permanent Building Fund Advisory Council (PBFAC). DPW staff produces a fiscal year request notebook provided to PBFAC in early September. Agencies and institutions present their requests to PBFAC in early October. DPW staff reviews the requests and consults with agencies and institutions to clarify issues. DPW staff then goes through a process of deciding which projects should be funded and what the Permanent Building Fund (PBF) allocations should be for each requesting agency and institution. Also, in the month of October, the Division of Financial Management (DFM) informs DPW of the anticipated revenue amount for the fiscal year's funding. This sum is the basis for DPW staff's allocation recommendations which are presented to the PBFAC at its November meeting. At its November business meeting the PBFAC reviews DPW staff funding recommendations and votes on funding recommendations for the next fiscal year. DPW staff forwards those recommendations to DFM and the Legislative Services Office for inclusion in their respective budget publications. The Governor makes a recommendation regarding major capital projects to the Legislature. The Legislature appropriates funds to DPW for specific major capital projects and funding for general alterations and repairs, and other projects statewide.

At its August meeting the Board voted to recommend no major capital funding for FY 2014 and have the Permanent Building Fund Advisory Council concentrate upon Alterations and Repairs and other non-major projects. However, since that time, several institutions have expressed concerns about this approach to the Board. As such, the chair of the Business Affairs and Human Resources Committee determined it was acceptable for the institutions to present their major



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
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capital project requests to the PBFAC at its October meeting, pending a possible motion to reconsider the Board's recommendation.

**IMPACT**

The PBFAC and DPW were notified by Board staff of the Board's August recommendation, and then were subsequently notified there may be a motion to reconsider this recommendation in October.

If the Board were to revise its recommendation, PBFAC and DPW would be notified accordingly, which would impact what projects could be considered for funding from the permanent building fund.

**ATTACHMENTS**

FY14 Major Capital Request Summary

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

A motion to reconsider must be made by a Board member who voted with the prevailing side at the August 2012 meeting. The Motion passed 6-0.

**BOARD ACTION**

I move to reconsider the motion of August 18, 2012, wherein the Board approved a recommendation for no major capital funding for FY 2014 and to have the Permanent Building Fund Advisory Council concentrate on alterations and repairs and other non-major projects.

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

I move to recommend to the Permanent Building Fund Advisory Council the number one priority major capital project as identified by each institution on page 3 for consideration in the FY 2014 budget process.

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



**BUSINESS AFFAIRS AND HUMAN RESOURCES**  
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**State Board of Education**  
**FY14 Major Capital Request Summary**  
**(\$ in 000's)**

Board Priority	Institution/Agency & Project	Detail Page	Total Project Cost		FY 2014 Request
			Perm. Building Fund	Total Funds	
1	<b>Boise State University</b>				
2	1 Institute for Arts & Humanities Building (planning/design)	13	1,800.0	1,800.0	1,800.0
3	2 Physical and Material Science Building (planning/design)	17	1,800.0	1,800.0	1,800.0
4	3 College of Business/Econ. Building (renovate/repurpose)	21	1,500.0	1,500.0	1,500.0
5	<b>Idaho State University</b>				
6	1 Anatomy/physiology/neuroanatomy lab at ISU-Meridian	25	2,500.0	3,914.6	2,500.0
7	2 Beckley Nursing Asbestos Mitigation	27	1,100.0	1,100.0	1,100.0
8	3 Eli Oboler Library	28	6,000.0	6,000.0	6,000.0
9	4 Holt Area/Install synthetic practice field for football	29	-	1,100.0	-
10	<b>University of Idaho</b>				
11	1 Integrated Research and Innovation Center	31	5,000.0	47,800.0	5,000.0
12	2 Northern Idaho Collaborative Ed. Facility (UI, LCSC, NIC)	43	8,420.8	12,420.8	4,000.0
13	<b>Lewis-Clark State College</b>				
14	1 Northern Idaho Collaborative Educ. Facility (see above)	43			
15	<b>North Idaho College</b>				
16	1 Northern Idaho Collaborative Educ. Facility (see above)	43			
17	2 Professional-Technical Building	47	12,000.0	12,000.0	12,000.0
18	<b>College of Western Idaho</b>				
19	1 Health Sciences Building	49	33,750.0	33,750.0	33,750.0
20	2 Nampa Campus Master Plan (Phase II)	50	210.0	210.0	210.0
21					
22	<b>Total</b>		\$ 74,080.8	\$ 123,395.4	\$ 69,660.0



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**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
<b>1</b>	<b>UNIVERSITY OF IDAHO – SECOND YEAR LAW PROGRAM</b>	Approval Item
<hr/>		
	<b>BOISE STATE UNIVERSITY – I-DO TEACH PROGRAMS</b>	
<b>2</b>	<ul style="list-style-type: none"><li>a. Certificate in IDo-Teach STEM Teacher Certification</li><li>b. BS in Biology, Emphasis in STEM Secondary Education</li><li>c. BS in Chemistry, Emphasis in STEM Secondary Education</li><li>d. BS in Geosciences, Emphasis in STEM Secondary Education</li><li>e. BS in Mathematics, Emphasis in STEM Secondary Education</li><li>f. BS in Physics, Emphasis in STEM Secondary Education</li><li>g. Discontinue, BS in Biology, Secondary Education</li><li>h. Discontinue, BS in Chemistry, Secondary Education</li><li>i. Discontinue, BS in Geosciences, Secondary Education</li><li>j. Discontinue, BS in Mathematics, Secondary Education</li><li>k. Discontinue, BS in Physics, Secondary Education</li></ul>	Approval Item
<b>3</b>	<b>BOARD POLICY III.V. STATEWIDE ARTICULATION AND ASSOCIATE DEGREE AND BOARD POLICY III.N. PRIVATE, IN-STATE, OUT-OF-STATE - FIRST READING</b>	Approval Item

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**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
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<b>4</b>	<b>BOARD POLICY III.AA. IDAHO RURAL PHYSICIAN INCENTIVE PROGRAM - FIRST READING</b>	Approval Item
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<b>5</b>	<b>BOARD POLICY III.AB. ACCOUNTABILITY OVERSIGHT COMMITTEE - FIRST READING</b>	Approval Item
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**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
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**UNIVERSITY OF IDAHO – COLLEGE OF LAW**

**SUBJECT**

Second-Year Law Curriculum in Boise

**REFERENCE**

August 21, 2008	The Board authorized the University of Idaho to expand its offerings in Boise to a full third year curriculum to include a legislative appropriation in the FY 2010 budget for the expansion.
August 16, 2012	The Board reviewed the University of Idaho's FY 2014 Line Item request for a new appropriation of \$400,000 to help support the cost of delivering the second year law curriculum in Boise. The Board gave preliminary approval to the line-item request subject to programmatic review at the October 2012 meeting.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies and Procedures, Section III.G.4.a.i (2)

**BACKGROUND/DISCUSSION**

On August 21, 2008, the Board considered a proposal by the University of Idaho to deliver the three-year Juris Doctor (JD) degree program in Boise as well as in Moscow ("dual location model"). The proposal was supported by the Idaho Supreme Court, which collaborated with the University of Idaho in developing a multi-purpose Idaho Law Learning Center in Boise. After extensive discussion, the Board adopted a motion "to authorize the University of Idaho to expand its offerings in Boise to a full third year curriculum and to include a legislative appropriation in the FY 2010 budget for this expansion." The Board also directed the University to "continue collaborating with the Supreme Court and to return to the Board for discussion of a reworked proposal for the full three-year curriculum." The Board authorized an appropriation request of approximately \$900,000 per year; however, due to budget exigencies, the Governor did not include the request in his FY10 Executive Budget submitted to the Legislature.

In 2010, utilizing a "bootstrap" combination of student revenues and reallocated University resources, the University moved forward with a third-year program. The first student cohort, consisting of 29 students who had started the JD program in Moscow, was enrolled in the fall of that year. A similar cohort was enrolled in 2011, and another has just enrolled in 2012. The third-year courses are delivered at the University of Idaho/Boise Center ("Water Center Building"). The success of the third-year program, which was approved by the American Bar Association, has demonstrated the importance of public legal education in the



state capital, and has laid the foundation for enhancing student opportunities through expansion of the JD curriculum in Boise.

Meanwhile, development of the Idaho Law Learning Center has been moving forward. The Idaho Department of Administration, which has responsibility and authority for buildings in the Capitol Mall area, has identified the old Ada County Courthouse (“Capitol Annex”) as a historic building and designated it as the “future home of the Idaho Law Learning Center.” Through the Division of Public Works, the Department of Administration has acted in consultation with the Idaho Supreme Court, which in turn, is collaborating with the University of Idaho, to obtain legislative appropriations to the State Building Fund for renovation of the historic building. Of \$6 million estimated necessary for the renovation, \$3.5 million has been appropriated to date. The University of Idaho has also raised \$1.1 million in private commitments for funding tenant-specific improvements that will enable the building to be used for all of its collaborative purposes: a permanent home for the State Law Library (now under integrated management by the University of Idaho, pursuant to agreement with the Supreme Court), the JD program, continuing judicial education, and law-related civic education for the public.

The University proposes to expand the third-year curriculum in Boise to include a second-year curriculum. Second-year courses could be a step toward establishing a full three-year branch curriculum. The second-year curriculum is proposed in order to advance the interests of students, better serve the state, and more adequately fulfill the University’s statewide mission in legal education. The delivery of second-year courses in Boise will enable law students to pursue their upper-division (second- and third-year courses) in the location that offers the greatest *comparative advantage* for them. Boise, as a metropolitan location and state capital, offers a comparative advantage in business law and entrepreneurship, international business, economic development, intellectual property, and certain aspects of regulatory law.

## **IMPACT**

Increased teaching, scholarship, and outreach in Boise, by faculty and by upper-division law students, will also enhance the University of Idaho, College of Law’s service to the state’s legal profession, business community, and all three branches of state government. Moreover, the second-year curriculum will enable law students to advance more seamlessly into their third year in Boise, and will make the concurrent degree programs with Boise State University (the JD/Master of Accountancy and the forthcoming JD/MBA program) more readily accessible for Treasure Valley students.

The proposal contemplates a combination of student revenues, University reallocations, and a requested legislative appropriation of \$400,000 per year, commencing in Fiscal Year 2014, to fund the operation of the second-year JD curriculum in Boise. The UI estimates that they will need approximately \$300,000 per year from student fees to start the second-year curriculum. For the



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initial years of the proposal, the operating budget shows an annual net loss, managed by College of Law reserves. The operating budget begins to show a positive cash flow by fiscal year 2017.

**ATTACHMENTS**

Attachment 1: Proposal for Second-Year Law Curriculum in Boise

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Attachment 2: Letters of Support

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**STAFF COMMENTS AND RECOMMENDATIONS**

The University of Idaho (UI) proposes to broaden the third-year law curriculum currently offered in Boise to include the second-year law curriculum in an effort to meet the demand for legal education in the Treasure Valley. The UI is the only Idaho public institution that offers a law program.

The UI demonstrates the need for legal education in the Boise area as evidenced by the extensive market study conducted by the College of Law in 2008, which assessed the demand and impact of expanding its course offerings in Boise. The UI also provided evidence that there are state workforce needs based on the projections provided by the Idaho Department of Labor, which showed that in 2011 Idaho was expecting to have an estimated 91 job openings per year in Idaho for lawyers and judicial clerks. It's important to note that not all law graduates enter into law practice in the traditional sense. They are presented with other valuable advantages after obtaining the JD degree in various fields such as business and entrepreneurship; human resources; public administration; teaching and educational administration; nonprofit entity management, social services; mediation and other forms of facilitated dispute resolution; and military service. In fact, based on national statistics as many as 30% of JD degree holders find careers outside of the traditional practice and the judiciary.

The demonstrated need is further evidenced by the establishment of Concordia University of Oregon and the implementation of their new law program in Boise. Concordia reported an enrollment of approximately 75 first-year students this fall. It's important to note that while their Law program is currently unaccredited, they have announced their intentions to seek and obtain American Bar Association accreditation.

The offering of the second-year law curriculum will provide law students in the Treasure Valley with both rural and urban learning opportunities at an affordable cost in comparison to other states. In fact, the UI provided evidence that in the 2011-12 academic year, tuition at private law schools in the Northwest and Intermountain West (other than BYU) ranged from \$33,960 to \$39,210 per year. For public law schools in this region, Idahoans paid nonresident tuition ranging from \$25,245 to \$41,050. In contrast, the University of Idaho charged Idaho residents \$14,404. Even the UI's non-resident tuition level in 2011-12 (\$26,560) compares favorably to the tuition levels in other states.



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The UI will be requesting a new State appropriation of \$400,000 per year during the upcoming legislative session if the second-year curriculum is approved. Staff would like to point out that the UI's administration committed a \$300,000 annual investment to start the third-year curriculum in Boise, which will now be used to support the second-year curriculum.

The University of Idaho's request to offer the second-year curriculum in Boise is consistent with their Five-Year Plan for Delivery of Academic Programs in the Southwest Region and is in alignment with their statewide program responsibility pursuant to Board Policy III.Z.

Board staff and Council on Academic Affairs Programs (CAAP) recommend approval as presented.

**BOARD ACTION**

I move to approve the request by the University of Idaho to offer a second-year law curriculum in Boise.

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



# Idaho State Board of Education

## Proposal for Graduate and Doctoral Degree Program

ORIGINALS

Date of Proposal Submission:	August 31, 2012
Institution Submitting Proposal:	University of Idaho
Name of College, School, or Division:	College of Law
Name of Department(s) or Area(s):	n/a

**Program Identification for Proposed New, Modified, or Discontinued Program:**

Title:	Law Second-Year Curriculum in Boise		
Degree:	J.D.		
Method of Delivery:	In person and some distance education		
CIP code (consult IR /Registrar)	22.0101		
Proposed Starting Date:	August 2014		
Indicate if the program is:	<input type="checkbox"/> Regional Responsibility	X	<input checked="" type="checkbox"/> Statewide Responsibility

**Indicate whether this request is either of the following:**

- |  |  |
|--|--|
| <input type="checkbox"/> New Graduate Program            | <input type="checkbox"/> Contract Program/Collaborative                                |
| <input type="checkbox"/> New Doctoral Program            | <input checked="" type="checkbox"/> Expansion of an Existing Graduate/Doctoral Program |
| <input type="checkbox"/> New Off-Campus Graduate Program | <input type="checkbox"/> Consolidation of an Existing Graduate/Doctoral Program        |
| <input type="checkbox"/> New Off-Campus Doctoral Program | <input type="checkbox"/> Discontinuation of an existing Graduate/Doctoral Program      |

<p><u>Don Burnett</u> 4 Sep 2012</p> <p>College Dean (Institution) _____ Date</p>	<p>Vice President for Research (as applicable) _____ Date</p> <p><u>Patty Smith</u> 9/26/12</p>
<p>Graduate Dean (as applicable) _____</p> <p><u>Frank Smith</u> 9/5/2012</p> <p>Chief Fiscal Officer (Institution) _____ Date</p>	<p>Academic Affairs Program Manager _____ Date</p> <p><u>Selva M. Garcia</u> 9/27/12</p> <p>Chief Academic Officer, OSBE _____ Date</p>
<p><u>Doug Baker</u> 9/14/12</p> <p>Chief Academic Officer (Institution) _____ Date</p>	<p>SBOE/OSBE Approval _____ Date</p>
<p><u>M. Quane Feltis</u> 9/18/12</p> <p>President _____ Date</p>	

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- **Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuation. All questions must be answered.

- 1. Describe the nature of the request.** Will this program be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

In August 2008, the University of Idaho sought approval from the Board of Regents/State Board of Education to establish a branch location of the College of Law as a second place for delivery of the Juris Doctor degree. In response, the State Board passed the following motion:

“A motion to authorize the University of Idaho to expand its offerings in Boise to a full third year curriculum and to include a legislative appropriation in the FY 2010 budget for this expansion. The Regents recognize the statewide mission of the University of Idaho for legal education. The University is instructed to re-visit the issue of funding and support for a full dual location model, including a full three year branch curriculum in Boise, to continue collaboration with the Idaho Supreme Court on the Idaho Law Learning Center with respect to those programs to be delivered in Boise, and return to the Regents for further discussion.”

This document contains the University's request to broaden the approved third-year law curriculum in Boise by adding a second-year curriculum.

The proposed second-year law curriculum in Boise is not a new program; rather, it is an addition of second-year courses to the third-year curriculum currently delivered in Boise pursuant to the foregoing action of the Board. There would be one Juris Doctor degree program offered by the University of Idaho, with the full three-year curriculum delivered in Moscow and two years of the curriculum also available in Boise. Students who elected to take courses in the Boise law curriculum would complete the course work for their first year of the three year law program in Moscow and would then be able to complete both the second year and third year of law school in Boise through a highly structured and focused curriculum.

- 2. List the objectives of the program.** The objectives should address specific needs the program will meet. They should also identify and the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*

The delivery of second-year courses in Boise is intended to enable law students to pursue their upper-division (second- and third-year courses) in the location that offers the greatest *comparative advantage* for them. Boise, as a metropolitan location and state capital, offers a comparative advantage in business law and entrepreneurship, international business, economic development, intellectual property, and certain aspects of regulatory law. Increased teaching, scholarship, and outreach in Boise will also enhance the University of Idaho College of Law's service to the state (and state government) and the University's fulfillment of its Board-assigned statewide mission in legal education.

The second-year curriculum will advance these key objectives in the following ways:

- Meet the demand for legal education in the Treasure Valley by extending the time students may be engaged in study there from one to two years.
- Provide high quality, “real world” service learning and placement opportunities in the Treasure Valley while meeting the need of state government and other public and non-profit entities for

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legal research and clinical legal services.

- Deepen and expand the College of Law's Business expertise by expanding course offerings and research in that area.
- Provide public service clinical legal services to small business and state and local governmental entities through the Small Business Legal Clinic and the Economic Development Clinic in Boise
- Continue the incremental expansion of the College of Law's delivery of legal education in Boise, under the guidance and approval of the Board.
- Enhance access by Treasure Valley students to concurrent degree programs provided by the University of Idaho and Boise State University (JD/Master of Accountancy and the forthcoming JD/MBA program).

**3. Briefly describe how the institution will ensure the quality of the program (i.e., program review).**

Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

The College of Law is accredited by the American Bar Association and has received ABA approval (known as "acquiescence") for delivery of the third-year curriculum in Boise. The expansion of the College's curriculum in Boise to include second-year courses presumably will require ABA review and approval in advance of offering the courses. The ABA requires that resources for a satellite location be sufficient to assure ongoing compliance with ABA standards at both the satellite and home locations. Once approved, the second-year curriculum in Boise will be reviewed as part of the ABA's annual and 7-year accreditation review. The College is in active communication with the ABA and will formally seek whatever approval is necessary as soon as the State Board authorizes the second-year curriculum and funding for delivery of the curriculum is identified.

**4. List new courses that will be added to your curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. *This question is not applicable to requests for discontinuance.*

No new courses will be added to the College of Law curriculum as a result of this proposal. Rather the proposal adds a new location in which the existing College of Law curriculum will be offered. As new faculty are hired to support the second location, it is likely that new courses will be developed to take advantage of the expertise these faculty will bring to the College of Law. However, those courses are not required for this proposal and cannot be fully anticipated in advance of the program. In all likelihood, because of the business and entrepreneurship focus of the Boise program, any new courses that are added will be in the area of business law, commercial development of intellectual property, and business-related regulatory law.

**5. Please provide the program completion requirements curriculum to this proposal as Appendix**

**A.** *For discontinuation requests, will courses continue to be taught?*

The information in Appendix A comes directly from the Law Student Handbook and sets forth, in detail, the requirements for the JD degree:

Credit hours required:	90
Credit hours required in support courses:	
Credit hours in required electives:	
Credit hours for thesis or dissertation:	0
<b>Total credit hours required for completion:</b>	90

The requirements for completion of the JD Degree are not changed by this proposal. The requirements for the degree do not include any supportive courses from outside the College of

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Law, although students may take a limited number of such courses with the approval of the Associate Dean and may count the credits toward the requirements for the JD degree. The JD Degree does not have “required electives,” nor is a thesis or dissertation required.

**6. Describe additional requirements such as preliminary qualifying examination, comprehensive examination, thesis, dissertation, practicum or internship, some of which may carry credit hours included in the list above.** *This question is not applicable to requests for discontinuance.*

The requirements for the JD degree are not changed by this proposal. Those requirements may be satisfied, in part through field placement and clinical legal education courses. The requirements for the JD are provided in Appendix A.

**7. Identify similar programs offered within Idaho or in the region by other colleges/universities.** *If the proposed request is similar to another state program, provide a rationale for the duplication.*

The University of Idaho has the exclusive statewide mission in public legal education. There are no other JD degree programs at public universities in Idaho. Each contiguous state has a public law school offering the JD degree, plus several private schools. An out-of-state institution, Concordia University of Oregon, is starting a private law school in Boise; it is currently unaccredited but may seek accreditation after two years of operation.

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

Institution and Degree name	Level	Specializations within the discipline (to reflect a national perspective)	Specializations offered within the degree at the institution
BSU			
CSI			
CWI			
EITC			
ISU			
LCSC			
NIC			
UI			

**8. Describe the methodology for determining enrollment projections.** *If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as Appendix B. This question is not applicable to requests for discontinuance.*

As part of its strategic planning in 2007-08, the College of Law conducted extensive market research on the demand for, and impact of, an expansion of its course offerings in Boise. As explained at length in the 2008 proposal, the research disclosed that the establishment of a Boise campus, complementing the Moscow campus, would have the following effects:

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- The College of Law would receive applications from an even greater proportion of the Idahoans who apply to law school each year than the College did then -- and does now. Currently, without the ability to offer more than one year of opportunity in Boise, the College has seen the number of applications by Idaho residents fall from 202 (30% of the total applicant pool) in 2007 to 179 (27% of the pool) in 2011.
- The total number of Idahoans who apply to a law school would increase, as place-bound residents in southern Idaho would apply to the College of Law if they saw an opportunity to receive 2 or all 3 years of their legal education on a Boise campus.
- The College of Law would enroll a higher percentage of applicants among those who apply and are accepted. (In a 2007 survey of students who applied to, and were accepted by, the College of Law, but who then decided not to pursue a legal education at the University of Idaho, 64% of the non-enrollees said they would have been more likely to attend the University of Idaho if the College of Law had been located in both Boise and Moscow; this included 17% who said they would have been "much more likely to attend." Among Idaho resident non-enrollees, the survey results were even more striking: 79% said they would have been more likely to attend, including 31% who said they would have been "much more likely" to do so.
- The College of Law would also get more applications from non-residents than it does now, and it would enroll a higher percentage of the non-residents to whom it offers admission. A 2008 survey of potential law school applicants in Idaho and surrounding states showed an 84% increase in expressions of interest in the University of Idaho College of Law if it were to offer legal education at both Moscow and Boise. The nonresident population is important because many non-residents have personal or family connections to Idaho. Moreover, they contribute to the quality of the law school because they bring a wider range of experiences and diversity of backgrounds than would exist in a class consisting exclusively of one state's residents. They also enhance the educational opportunities for College of Law graduates, not only by paying out-of-state tuition (which helps keep in-state tuition down), but also by spreading the reputation of the College of Law among lawyers and other professionals outside Idaho who then employ Idaho law graduates or refer cases in Idaho to them. Furthermore, many non-resident law students stay in Idaho after graduation from the College of Law, enriching the Idaho legal profession and making other valuable contributions to the state. Their College of Law education trains them in Idaho law and acculturates them to the high standards of professionalism of the Idaho bar and the broader professional community of which the state bar is a part.

**9. Enrollment and Graduates.** Using the chart below, provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the projected number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years, to include number of graduates and graduation rates.

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Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current 2011-12	Year 1 Previous 2010-11	Year 2 Previous 2009-10	Current 2011-12	Year 1 Previous 2010-11	Year 2 Previous 2009-10	
BSU							
ISU							
LCSC							
UI	M=334 B=30	M=319 B=30	M=322 B=0	M=76 B=27	M=78 B=24	M=95 B=0	92.3%*
CSI							
CWI							
EITC							
NIC							

**M=Moscow campus; B=Boise campus.** Please add M and B for total enrollment and degrees awarded for the academic years presented.

*\*The graduation rate has been provided by the UI Institutional Research Office. It is calculated using the 2005-06 cohort which began in fall of 2005. This is the most recent six year graduation rate.*

- 10. Will this program reduce enrollments in other programs at your institution? If so, please explain.**

There is only one law program in Idaho. This proposal only anticipates the addition of a location at which a portion of the curriculum would be offered. We do not anticipate that enrollment at the College of Law will change as a result of offering second-year courses in Boise. To the extent it changes we anticipate some incremental increase in enrollment because some of the students in Boise will be transfer students from other law schools who wish to finish their legal education in a metropolitan location.

- 11. Provide verification of state workforce needs such as job titles requiring this degree.** Include State and National Department of Labor research on employment potential.  
All jobs in the United States requiring a law license entail passage of a bar examination, and, in turn, qualification to sit for a state bar examination requires – in nearly all states including Idaho – a Juris Doctor degree earned from an accredited law school. In addition, many jobs either require or favor a JD degree even if they do not separately require a law license..

Although the availability of law license jobs has softened nationwide, especially in very large firms, Idaho graduates have not been as adversely affected as their national counterparts. Many Idaho graduates pursue careers in small- to medium-sized firms, where employment levels are holding steady or improving. In 2010, 21% of the nation's law graduates went to work at firms with more than 500 attorneys, down from 26% the previous year. In contrast, 39% took jobs in small firms of 2-10 attorneys, up from 32% the previous year, and the fraction of graduates entering solo practice rose from 3% to 6%. Moreover, demand for the Juris Doctor degree goes beyond the practice of law.

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The JD degree provides a valuable advantage in business and entrepreneurship; human resources; public administration; teaching and educational administration; nonprofit entity management, social services; mediation and other forms of facilitated dispute resolution; military service; and other fields.

National statistics indicate that as many as 30% of JD degree holders find careers outside the traditional practice. Such jobs often provide attractive compensation along family-friendly working hours. Even if the focus is limited to traditional law jobs, the impact of the "Great Recession" on the "legal sector," as measured by the U.S. Bureau of Labor Statistics, has been modest in comparison to employment categories generally. The lawyer unemployment has varied only from approximately 2% to 2.5% during the "Great Recession." This is because the legal profession is restructuring from very large firms to smaller firms.

Demand for a program of public legal education that offers both rural and urban learning opportunities will remain strong, especially if it is coupled with a cost advantage. In 2011-12, tuition at private law schools in the Northwest and Intermountain West (other than BYU) ranged from \$33,960 to \$39,210 per year. Even at public law schools in this region, Idahoans would pay non-resident tuition ranging from \$25,245 to 41,050. In contrast, the University of Idaho College of Law in 2011-12 charged Idaho residents \$14,404. Even our non-resident tuition level in 2011-12 (\$26,560) compares favorably to the tuition levels in other states. The benefit of a cost-effective legal education is realized not only by the students, also by their eventual clients who will not have to pay fees leveraged upward by their attorneys' high educational debts.

Demand for legal education specifically in the Treasure Valley is demonstrated by the entry into the Treasure Valley "market" of a private law school affiliated with a private Oregon university. That law school has announced the enrollment of approximately 75 first-year students in the fall of 2012 and has announced its intention to seek and obtain American Bar Association accreditation. In 2011 the University of Idaho College of Law received 98 applications from prospective students in the southwest Idaho counties comprising the "Treasure Valley; in 2012 the College received 71 such applications. In 2011 the College enrolled 47 law students from the Treasure Valley area; that number decreased in 27 in 2012. The addition of a second-year curriculum in Boise, enabling students to take nearly 2/3 of their credit hours in Boise, and facilitating participation in concurrent degree programs with Boise State University, will improve the University of Idaho's attractiveness to prospective law students in the Treasure Valley and across southern Idaho.

The job market for Idaho law graduates will remain strong as Idaho continues to be a net importer of legal talent. The Idaho Department of Labor in 2011 estimated that Idaho is expected to have 91 job openings per year for lawyers and judicial clerks. Because approximately 65% of Idaho's graduates typically take jobs within the state, and up to 30% find their way into careers outside the practice of law and the judiciary, the data would suggest that approximately 45 of the University of Idaho's law graduates in 2011 were seeking those 91 jobs. The Department of Labor also has projected that employment opportunities in law are expected to evolve at about the same rate as employment in the economy as a whole. Moreover, Idaho ranks 49th among the 51 states and District of Columbia in lawyers per capita; that is why Idaho is a net importer of legal expertise. In fact, from 2009 to 2011, fewer than one-third of the new lawyers admitted to practice in Idaho, including reciprocal admissions from other states, were graduates of the University of Idaho College of Law.

In addition, the legal profession is aging. A survey in 2011 by the Idaho State Bar disclosed that more than half of all Idaho lawyers are fifty years of age or older. A similar survey in Washington, where our College of Law places the second-highest number of its graduates, showed that 71% of lawyers are fifty years of age or older, that 21% more than 60 years of age, and that 21% plan to retire within the next five years.

At the College of Law, job placement figures have shown the effect of the "Great Recession" but appear to be rebounding: (a) In the Class of 2009, 80.43% of graduates surveyed had found

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employment (65.22% full-time) within 9 months of graduation – a time period that includes taking, and receiving the results of, a state bar examination. In 2010, at the nadir of the “Great Recession,” the percentage reporting employment had decreased slightly to 79.78% (64.04% full-time). In 2011, the percentage reporting employment increased to 85.71% (73.47% full-time). Some graduates were not looking for employment because they were pursuing additional graduate-level academic degrees.

The average starting salary, for all categories of public and private sector jobs, rose from \$49,349 for the class of 2009 to \$50,359 for the class of 2010 and to \$51,229 for the class of 2011.

Barriers to entry in legal education include significant regulatory requirements (in particular, the rigorous multi-year accreditation process of the American Bar Association) as well as the financial challenges of operating a quality, nationally accredited JD degree program. Nonetheless, seeing the opportunity in Idaho, a private institution from Oregon has entered the Boise market for legal education, with the announced intent to enroll a class in 2012 and to attain accreditation. The University of Idaho, by establishing a second-year curriculum in Boise and ultimately a full three-year JD degree program in Boise, complementing the Moscow program, will better serve Idaho’s students, better serve the state through faculty and students working and studying in the state capital, and better fulfill the statewide mission in legal education assigned to the University by the Board of Regents/State Board of Education.

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

In the following chart, state figures are used because the University of Idaho has a statewide mission, the Idaho Department of Labor provides statewide data, and opportunities for JD degree holders are not limited to a particular region or locality. As explained above, the Department of Labor in 2011 estimated 91 job openings per year in Idaho for lawyers and judicial clerks, which are traditional jobs in practice and the clerkship gateway to practice. U.S. Department of Labor estimates show that traditional law jobs are expected to grow at about the same rate as the national economy (approximately 2%). As further noted above, the NALP (*After the JD Degree* studies I and II) has shown that more than 30% of JD degree holders go into jobs outside these traditional areas. Of those seeking traditional jobs, 65% on average search in Idaho; the other 35% to out of state. Thus 45 members of the graduating Class of 2011, which can be used as a baseline year would have been looking for these *traditional jobs*. An enrollment increase of approximately 14% in the *entering* classes of 2010 and 2011, over the entering class of 2008 that produced the graduating class of 2011, will result in about 14% more job seekers, as reflected below. However, in 2012, as the College of Law maintained its admissions standards notwithstanding a dip in applications, the enrollment level returned to pre-2010 levels and the eventual number of traditional job seekers from that cohort of students will subside accordingly. The proposed second-year curriculum in Boise will provide an advantage to those students to seek to focus in business law and/or to locate their families and careers in the Boise area or elsewhere in southern Idaho.

	Year 1	Year 2	Year 3
<b>Local (Regional)</b>			
<b>State</b>	91 jobs 45 seeking from UI	93 jobs (up 2%) 51 seeking from UI	95 (up 2%) 51 seeking from UI
<b>Nation</b>			

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**Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as Appendix C.** The estimates shown above are extrapolations of Idaho Department of Labor data for traditional law jobs.

- a. **Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.** The curricular focus in Boise on business law and entrepreneurship will equip students to use their JD degrees as enablers of commerce and investment; moreover, some graduates will go into business for themselves, either right out of law school or eventually.
- b. **Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.** The Boise curriculum also enables students to work, and later use their experiences to obtain employment, in government agencies in Idaho's capital city and to secure externship opportunities in a wide array of private, public, and nonprofit settings.

**12. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe.** *This question is not applicable to requests for discontinuance.*

Some interactive video will be used to deliver courses from Boise to students in Moscow and visa-versa. Distance Learning will not constitute a significant portion of the curriculum. Currently ABA accreditation standards preclude counting more than 12 distance learning credits toward the JD degree.<sup>1</sup> Thus while the curriculum in Moscow and in Boise will be enhanced through distance education, most courses in both locations will be delivered through traditional in person instruction.

**13. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission.** *This question is not applicable to requests for discontinuance.*

The University of Idaho has the exclusive state wide mission for legal education in Idaho. In 2008, the State Board of Education authorized the University of Idaho to develop a third-year law curriculum in Boise in order to better meet the needs of all Idahoans for legal education and to better serve the needs of the state (particularly state government) for legal expertise. This proposal constitutes a logical development of the existing Boise curriculum. The proposal advances specific elements of the State Board's strategic plan as follows:

- The State Board's Goal 1 ("A Well Educated Citizenry") will be advanced at Objective A ("Access") through the increased accessibility of a cost-effective public legal education made possible by the second-year program in Boise. One of the performance measures for that objective, achieving diversity in attainment of postsecondary education, also will be advanced

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**1 Standard 306. Distance Education**

(a) A law school may offer credit toward the J.D. degree for study offered through distance education consistent with the provisions of this Standard and Interpretations of this Standard. Such credit shall be awarded only if the academic content, the method of course delivery, and the method of evaluating student performance are approved as part of the school's regular curriculum approval process.

\* \* \*

(d) A law school shall not grant a student more than four credit hours in any term, nor more than a total of 12 credit hours, toward the J.D. degree for courses qualifying under this Standard.

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by increased accessibility of public legal education in Idaho's largest metropolitan area. Moreover, a "well educated citizenry" will be enhanced through the civic education outreach programs developed by the College of Law at the Idaho Law Learning Center.

- The State Board's Goal 2 ("Critical Thinking and Innovation") will be advanced at Objectives A and B ("Critical Thinking, Innovation and Creativity") through the research, outreach, and service performed by law faculty and upper-division law students, especially in the curricular emphasis area of business law and entrepreneurship. Objective C ("Quality Instruction") will be advanced by the academic rigor of an American Bar Association-approved law school's program, delivered in the state capital.
- The State Board's Goal 3 ("Effective and Efficient Delivery Systems") will be advanced at Objective A ("Cost Effective and Fiscally Prudent [Programs]") and Objective C ("Administrative Efficiencies") by achieving economies of scale and capitalizing upon the comparative advantages of both a land-grant campus location and a metropolitan location, by delivering legal education through complementary programs at Moscow and Boise by a unified, statewide law faculty and administration. These objectives also will be advanced through the cost-effectiveness and synergy of linking the JD degree instruction offered by the University of Idaho with concurrent MBA and Masters of Accountancy degree opportunities at Boise State University.

**14. Describe how this request fits with the institution's vision and/or strategic plan.** *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal
University of Idaho Strategic Plan Goal 1 ("Teaching and Learning – Enable Student Success in a Rapidly Changing World")	This goal will be advanced at Objective A ("Build Adaptable, Integrative Curricula and Pedagogies") through the development and delivery of complementary curricula at Moscow and Boise, with distinctive areas of emphasis that utilize the advantages of the land-grant campus in Moscow and the metropolitan location in Boise.



<p>University of Idaho Strategic Plan Goal 2 (“Scholarly and Creative Activity – Promote Excellence in Scholarship and Creative Activity to Enhance Life Today and Prepare Us for Tomorrow”)</p>	<p>Goal 2 will be advanced at Objective A (“Strengthen All Scholarly and Creative Activities Consistent with the University’s Strategic Missions and Signature Areas”) through the research and outreach, particularly in the field of business law and entrepreneurship, of faculty and upper-division students in Boise. Expanding the Boise program from a third-year to a combined second-and-third year program (and ultimately a full three-year branch program) will enable the University carry out more effectively its Board-assigned statewide mission in legal education. In addition, Objective B (“Enable Faculty, Student, and Staff Engagement in Interdisciplinary Scholarship and Creative Activity”) will be advanced through interactions between and among the University of Idaho’s Boise program, the business-related concurrent degree programs at Boise State University, the business enterprises and nonprofit entities of southern Idaho, and the sources of interdisciplinary expertise residing at federal and state regulatory agencies in and near Boise.</p>
<p>University of Idaho Goal 3 (“Outreach and Engagement – Meet Society’s Critical Needs by Engaging in Mutually Beneficial Partnerships”)</p>	<p>Goal 3 will be especially advanced at Objective B (“Strengthen and Expand Mutually Beneficial Partnerships with Stakeholders in Idaho and Beyond”) through the University’s collaboration with the Idaho Supreme Court on the Idaho Law Learning Center, through concurrent degree programs offered with Boise State University, through cooperative projects undertaken with the Idaho’s legal and business communities, and through increased interaction with -- and service provided by law faculty and students to -- government agencies in and near Idaho’s capital city.</p>
<p>University of Idaho Goal 4 (“Community and Culture – Be a Purposeful, Ethical, Vibrant, and Open Community”)</p>	<p>Goal 4 will be advanced by enhancing enhanced access for, and inclusion of, diverse populations in legal education at a metropolitan location; by strengthening the viability and statewide relevance of the legal education program in Moscow through its connections to a complementary program in Boise; and by the enhancing the statewide visibility of the College of Law, which will benefit students in both Boise and Moscow who are in competition with graduates of other law schools in seeking and finding employment in and near Idaho’s major center of population, commerce, and government.</p>

**15. Is the proposed program in your institution’s Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

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Yes   X   No       

If not on your institution's Five-Year plan, provide a justification for adding the program.

16. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally). *For requests to discontinue a program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

Students will be informed of the second-year-in-Boise opportunity prior to admission to the College of Law through all the marketing information currently developed by the College's admission office to promote the JD program in general. Once admitted all students will be counseled about the College curricular offerings in Boise through faculty mentorship, the College's Academic Support programs, the College's website and the Law Student Handbook.



17. In accordance with Board Policy III.G., an external peer review is required for any new doctoral program. Attach the peer review report as **Appendix D**.

N/A

18. **Program Resource Requirements.** Using the **Excel spreadsheet**<sup>2</sup> provided by the Office of the State Board of Education indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile budget explanations below. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**a. Personnel Costs**

**Faculty and Staff Expenditures**

Project for the first three years of the program the credit hours to be generated by each faculty member (full-time and part-time), graduate assistant, and other instructional personnel. Also indicate salaries. After total student credit hours, convert to an FTE student basis. Please provide totals for each of the three years presented. Salaries and FTE students should reflect amounts shown on budget schedule.

Name, Position & Rank	Annual Salary Rate	FTE Assignment to this Program	Projected Student Credit Hours	FTE Students
Full-time tenure track associate professor	\$136,000 <sup>3</sup>	1.0 1.0 1.0	420 <sup>4</sup> - FY14 420 – FY15 420 – FY16	35 35 35
Full-time tenure track associate professor	\$136,000	1.0 1.0 1.0	420 – FY14 420 – FY15 420 – FY16	35 35 35

Project the need and cost for support personnel and any other personnel expenditures for the first three years of the program.

New Boise Personnel	FY14	FY15	FY16
Assistant Business Manager	\$0	\$0	\$66,000
Student Services Assistant Director	\$66,000	\$66,000	\$66,000
IT Manager	\$0	\$59,000	\$59,000
IT Staff/classroom support	\$0	\$45,000	\$45,000
Faculty Support Staff	\$0	\$44,800	\$44,800
<b>Yearly Total</b>	<b>\$66,000</b>	<b>\$214,800</b>	<b>\$280,800</b>

<sup>2</sup> The attached spreadsheet varies from the SBOE template but has been deemed adequate by SBOE staff for purposes of this proposal as it provides more detail than required by the standard template.

<sup>3</sup> Annual salary rate is calculated as a \$90,000 base salary, plus fringes, research stipend, professional development costs and miscellaneous fees.

<sup>4</sup> Calculated at 12 credit hours per academic year, multiplied by 35 full-time students



### Administrative Expenditures

Describe the proposed administrative structure necessary to ensure program success and the cost of that support. Include a statement concerning the involvement of other departments, colleges, or other institutions and the estimated cost of their involvement in the proposed program

Name, Position & Rank	Annual Salary Rate	FTE Assignment to this Program	Value of FTE Effort to this Program

The College of Law will utilize existing administrative structure for the program, supplemented by the new Boise personnel noted in the previous section. The program will not require the involvement of other departments, colleges, or other institutions.

### Operating Expenditures

Briefly explain the need and cost for operating expenditures (travel, professional services, etc.) - Operating expenditures for the existing 3<sup>rd</sup> year curriculum will be sufficient.

#### b. Capital Outlay

##### (1) Library resources

- (a) Evaluate library resources, including personnel and space. Are they adequate for the operation of the present program? If not, explain the action necessary to ensure program success.

The College will be required to support and maintain a law library that meets the needs of the College's teaching, scholarship, research, and service programs for the 2nd and 3rd year classes, as well as provide competent staff in sufficient numbers.

The College meets the needs of the 3rd year curriculum in Boise through its management of the State Law Library located on the 5th Floor of the Idaho Water Center and adjacent to the College of Law's student and faculty areas. The 5th floor law library is a collaboration between College of Law and the Idaho State Judiciary in which the College of Law has taken over management of the State Law Library and then supplemented the State Law Library with an academic collection in support of the 3rd year curriculum, as well as funded substantial updates to the practitioner and public collections.

The 5th floor collection currently has about 30,000 volumes and volume equivalents. In addition, selected federal, state, and Idaho archival materials are located in the basement of the Supreme Court Building. The Law Library has four computer terminals with public access to WESTLAW Next, and access to all of the databases currently subscribed to by the College of Law.

The library needs of 2nd year students will not be the same as those of existing 3rd year students. The College of Law Library has consulted with Westlaw regarding the level of funding that would be required to support the slate of courses to be offered during a 2nd year program. In addition, we have calculated the cost of non-Westlaw titles that would be needed to support a 2nd year. Accordingly, we have budgeted that amount to purchase treatises, practice materials, and loose-leaf services to support those courses. Additional funding would be used to cover the cost of adding monographs, loose leafs, and periodicals to the collection to support the UDWR and the expanded research needs of faculty. We believe that the existing library space at the Idaho Water Center can accommodate the addition of these materials.

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- (b) Indicate the costs for the proposed program including personnel, space, equipment, monographs, journals, and materials required for the program. See below.
- (c) For off-campus programs, clearly indicate how the library resources are to be provided. The existing State Law Library collection will be supplemented as follows:

	FY14	FY15	FY16
<b>Library – Boise</b>			
TT Librarian (JD - 12 month)	\$0	\$66,000	\$66,000
Materials with Continuations	\$140,000	\$140,000	\$140,000
Monographs	\$50,000	\$50,000	\$50,000
Online Services	\$140,000	\$140,000	\$140,000
<b>Yearly Total</b>	<b>\$330,000</b>	<b>\$396,000</b>	<b>\$396,000</b>

(2) Equipment/Instruments

Describe the need for any laboratory instruments, computer(s), or other equipment. List equipment, which is presently available and any equipment (and cost) which must be obtained to support the proposed program.

Capital budget items are detailed on the attached budget spreadsheet under the "Cap Budget Detail" sheet.

**d. Revenue Sources**

- (1) If funding is to come from the reallocation of existing state appropriated funds, please indicate the sources of the reallocation. What impact will the reallocation of funds in support of the program have on other programs?

The central administration of the University of Idaho will continue a \$300,000 annual investment that was used to start the third-year curriculum in Boise and now will be used to add the second-year curriculum. This investment will be reviewed annually.

- (2) If the funding is to come from other sources such as a donation, indicate the sources of other funding. What are the institution's plans for sustaining the program when funding ends?

Private funds will be used to enhance adjunct instruction, student scholarships, faculty research, co-curricular activities, and outreach initiatives at the Boise location.

- (3) If an above Maintenance of Current Operations (MCO) appropriation is required to fund the program, indicate when the institution plans to include the program in the legislative budget request.

The University of Idaho is requesting a new State appropriation of \$400,000/year and will seek the funding in the upcoming legislative session if approved and submitted to the Governor and Legislature by the State Board.

- (4) Describe the federal grant, other grant(s), special fee arrangements, or contract(s) to fund the program. What does the institution propose to do with the program upon termination of those funds?

N/A



(5) Provide estimated fees for any proposed professional or self-support program.

Additional program funding will be provided by student professional fees. We estimate that we need approximately \$300,000/year from student fees to start the Board-authorized second-year curriculum in Boise.

Law student dedicated professional fees are projected to increase approximately 7% per year, subject to State Board approval, during the time span of the budget contained in this proposal. These fees will be an investment in the overall strengthening of the law school by enabling the curriculum to be delivered at locations offering the greatest comparative advantage. Approximately in FY 2015, when the Idaho Law Learning Center may become available, and occupancy costs would be charged by the Department of Administration, students in Boise would pay an additional professional fee increment of approximately \$1,000 per year, subject to State Board approval, unless appropriated funds were obtained to cover the College's share of the occupancy costs shared with the Idaho Supreme Court.



## APPENDIX A

**B. Requirements for the J.D.**

You must meet all the following requirements to receive the J.D.:

- Pass all required courses;
- Fulfill the Upper Division Writing Requirement;
- Complete at least 90 semester hours of credit;
- Complete at least 86 classroom credits;
- Complete six semesters in residence at ABA-accredited law schools;
- Complete the last two semesters and 26 credits at the College;
- Satisfy the professional skills requirement with at least two hours of skills training;
- Perform at least 40 hours of law-related pro bono service; and
- Fulfill all requirements within six years of the date you entered law school.

**1. Required Courses**

The following are the required courses **for the Class of 2014:**

## 1L courses:

- 805 Introduction to Law and Procedure
- 806 Procedure II
- 807 Property
- 809 Torts
- 812 Criminal Law
- 813 Contracts
- 815 Legal Research and Writing
- 816 Constitutional Law I
- 820 Legislation and Regulation

## 2L courses:

- 905 Constitutional Law II
- 962 Professional Responsibility.

The following are the required courses **for the Classes of 2012 and 2013:**

## 1L courses:

- 805 Introduction to Law and Procedure
- 806 Procedure II
- 807 Property I
- 808 Property II
- 809 Torts I
- 810 Torts II
- 812 Criminal Law
- 813 Contracts I
- 814 Contracts II
- 815 Legal Research and Writing.

## 2L courses:

- 902 Constitutional Law I
- 905 Constitutional Law II
- 962 Professional Responsibility.



## 2. Upper Division Writing Requirement

You must satisfy the Upper Division Writing Requirement (UDWR) by completing a major writing project between the end of 1L year and graduation. After you have fulfilled the requirement, you are responsible for having the supervising faculty member sign the *Certification of Upper Division Writing Requirement* (found on the forms carousel outside the Deans' Office) and ensuring the certification is turned in to the Deans' Office. Do not assume your supervising faculty member will turn in the certification — **it is your responsibility to make sure the Deans' Office receives the signed certification.**

Normally the writing project must be supervised and graded by a member of the full-time faculty of the College of Law. With the prior written approval of the Dean of Faculty, visiting, affiliate, or adjunct faculty may be permitted to supervise and grade a major writing project when it is conducted as part of a seminar that faculty member teaches. **Never assume a paper you write will fulfill the UDWR.**

**You can only fulfill the UDWR by writing for a law school course.** Any of the following ways may suffice, but **all require the instructor's agreement to supervise the writing project under UDWR requirements:**

- Preparing a paper for a regularly scheduled course or seminar in which the instructor agrees to accept papers for satisfaction of the UDWR;
- Conducting independent research and writing under the supervision of a full-time faculty member in Law 983 (Directed Study);
- Completing the writing requirement for membership in the Idaho Law Review (Law 982) or *the crit* (Law 981);
- Preparing a major brief in Law 974 (Legal Aid Internship); or
- Preparing the problem and bench brief for the McNichols Competition (Law 955, Appellate Advocacy Program) under the supervision of the faculty member supervising the competition. **Please note: Writing a brief for the McNichols Competition, Law 955, does not fulfill the UDWR.**

Whether you write for a paper course, directed study, law journal, Clinic, or McNichols, you must be the exclusive author of the paper you write for the UDWR. You may not obtain any aid in the research, organization, writing, or any other aspect of the paper except for research and editorial assistance expressly approved by the supervising faculty member.

Your writing project must be a paper of at least 20 double-spaced pages exclusive of footnotes, evidencing significant legal or empirical research and thoughtful, well-drafted writing. The paper must reflect your ability to explore, on the basis of significant research in legal sources, the interrelationship of issues presented in a complex context. You must produce a minimum of two drafts. The supervising faculty member will review the paper and provide you with a detailed critique. In your subsequent draft, you must respond to and remedy the criticisms included in the supervising faculty's initial critique.

**Receiving a passing grade in the course for which you write your UDWR paper does not mean you have satisfied the UDWR** — the supervising faculty member must independently certify that the writing project satisfies the UDWR. Depending on the quality of your drafts, some faculty members may require more than two drafts before certifying that you have satisfied the UDWR. Because of the faculty's rigorous standards in certifying papers as satisfying the UDWR, you should strive to complete the UDWR by the end of the fifth semester.

## 3. Total Credits

Students must complete a minimum of 90 semester hours of credit either in the College of Law, by transfer from a law school on the approved list of the American Bar Association, or through approved graduate-level courses outside the law school.



#### 4. Classroom Credits

Of the 90 credits needed to graduate, 86 must be classroom credits, or “class hours” as defined by the American Bar Association’s Standards for Approval of Law Schools. You are not limited in the number of “non-classroom credits” you can take, but, if you have only 90 total credits, you may use no more than four “non-classroom credits” toward the credits required to graduate. Most College courses, including the Legal Aid Internship (“*Clinic*”) and most externships, provide classroom credits. However, the following courses provide only non-classroom credits:

Non-Classroom Credit Courses			
No.	Course Name	Term(s)	Credits
955	Appellate Advocacy Program ( <i>McNichols</i> )	Fall	2
981	Critical Legal Studies Journal	Fall/Spring	1-4
983	Directed Study	Fall/Spring Summer	1-2
982	Law Review	Fall/Spring	1-4
972	Legal Externship	Fall/Spring Summer	1
956	Moot Court	Fall/Spring	1-2
973	Public Service Externship, Non-Classroom Credit	Fall/Spring Summer	1-10

#### 5. Semesters and Credits in Residence

You must complete six semesters or their equivalent “in residence” (engaged in the fulltime study of law) at a law school on the approved list of the American Bar Association. **The “semesters in residence” graduation requirement is not related in any way to the establishment of Idaho state residency.**

In addition, you must take the last two semesters and the last 26 credits at the College of Law, unless the Dean of Students waives this requirement for good cause.

For spring and fall semesters, “in residence” means that you are enrolled for at least 10 credit hours during the semester, and that you pass at least nine of those hours. For summer session, you must be enrolled for five or more credits to receive credit for 1/2 semester in residence.

If you are enrolled for fewer than 10 credits during fall or spring semesters, you will receive residence credit in the ratio that the hours for which you are enrolled bear to 10. If you fail to pass at least nine credit hours, you will receive residence credit in the ratio that the hours passed bear to nine. In the event that both ratios apply to a given case, the lower ratio controls.

The College faculty may specify that specific courses do not satisfy all or part of a semester” in residence” requirement. If the faculty decides that a course does not satisfy the “in residence” requirement, that fact will be prominently noted in the Law Student Handbook (for permanently numbered courses) or in official communications from the College administration (for one-time special seminars and courses). Please note that **credits earned in the Northwest Institute for Dispute Resolution do not count toward credits in residence.**



**6. Professional Skills Requirement**

Students must earn at least two credits in courses designed to teach professional legal skills. You can satisfy the professional skills requirement by earning at least two credits from the following list of courses.

Professional Skills Courses				
No.	Course Name	Type	Term(s)	Credits
970	Advanced Legal Research	Simulation	Spring	2
967	Advanced Legal Writing	Simulation	Spring	2
955	Appellate Advocacy Program ( <i>McNichols</i> )*	Competition	Fall	2
912	Civil Mediation	Simulation	Summer	2
977	Clinical Labs	Live Client	Fall/Spring	1 (4 max)
914	Dispute Resolution	Simulation	Summer	1
913	Family Mediation	Simulation	Summer	2
986	Judicial Clerkship Seminar	Simulation	Spring	1
987	Law Practice Management	Simulation	Spring	1
971	Lawyering Process	Simulation	Spring	2
974	Legal Aid Internship ( <i>Clinic</i> )	Live Client	Fall/Spring Summer	1-3 (6 max)
966	Legal Drafting	Simulation	Spring	2
957	Mock Trial	Competition	Spring	2
956	Moot Court	Competition	Fall/Spring	1-2
917	Negotiation and ADR	Simulation	Fall	3
975	Public Service Externship, Classroom Credit	Externship	Summer	1-5 (10 max)
976	Semester in Practice	Externship	Spring	1-12 (12 max)
978	Small Business Legal Clinic	Live Client	Fall/Spring	1-3 (6 max)
958	Trial Advocacy	Simulation	Fall	2
954	Trial Skills	Simulation	Fall	3

\* Only students who compete in the quarter finals of the Appellate Advocacy Program (*McNichols Competition*) can use the course to satisfy the skills requirement.

**7. Pro Bono Service Requirement**

Students must perform a minimum of 40 hours of pro bono legal service. The service can normally start any time after the first semester; however, students on academic probation during the first year may not start fulfilling the pro bono service requirement until after the end of the second semester. The service requirement must be completed by the start of the sixth semester. The service must be provided without compensation, academic credit, or other tangible benefit.

The pro bono service requirement may be met by providing legal services to any of the following recipients enumerated in ABA Model Rule 6.1:

- (a) persons of limited means;
- (b) charitable, religious, civic, community, governmental, and educational organizations in matters that are designed primarily to address the needs of persons of limited means;



- (c) individuals, groups, or organizations seeking to secure or protect civil rights, civil liberties, or public rights; and
- (d) charitable, religious, civic, community, governmental, and educational organizations of limited means for furthering their organizational purposes; or by
- (e) participation in activities for improving the law, the legal system or the legal profession.

Students may initiate their own pro bono projects or select from pre-approved projects. All self-initiated projects must be approved in advance by the Pro Bono Program Director to qualify for pro bono credit. For more information, visit the Pro Bono Program website.

#### 8. Six Year Requirement

You must fulfill all the above requirements within six years of entering law school. If you must take leave of absence from the College, work closely with the Dean of Students to ensure you will meet this requirement.



OPERATING BUDGET PROJECTIONS	FY13 July 2012 - June 2013	FY14 July 2013 - June 2014	FY15 July 2014 - June 2015	FY16 July 2015 - June 2016	FY17 July 2016 - June 2017
REVENUES	Total FY13 Combined Operations	Total FY14 Combined Operations	Total FY15 Combined Operations	Total FY16 Combined Operations	Total FY17 Combined Operations
<b>Appropriated Funds</b>	\$3,636,467	\$3,636,467	\$3,636,467	\$3,636,467	\$3,636,467
<b>Student Fee Funds</b>					
Professional Fee Funds	\$2,889,806	\$3,094,982	\$3,251,502	\$3,482,359	\$3,729,606
Matriculation Fee Funds (increment)	\$178,808	\$182,513	\$182,513	\$155,001	\$155,001
Non-resident Fee Funds (increment)	\$85,132	\$86,834	\$88,571	\$90,342	\$92,149
<b>Boise Facilities Charge</b>	\$0	\$0	\$70,000	\$70,000	\$70,000
<b>Grant Funds</b>	\$269,767	\$269,767	\$269,767	\$269,767	\$269,767
<b>Auxiliary Funds</b>	\$88,662	\$88,662	\$88,662	\$88,662	\$88,662
<b>Gift and Endowments - Non Scholarship</b>					
Gifts Unrestricted	\$188,151	\$188,151	\$188,151	\$188,151	\$188,151
Gifts Restricted	\$89,226	\$114,226	\$139,226	\$164,226	\$164,226
Endowment earnings-unrestricted	\$48,861	\$48,861	\$48,861	\$48,861	\$48,861
Endowment earnings-Restricted	\$128,759	\$128,759	\$128,759	\$128,759	\$128,759
<b>Scholarships</b>					
Gifts and Endowments	\$378,344	\$378,344	\$378,344	\$378,344	\$378,344
Tuition Waivers	\$234,170	\$234,170	\$234,170	\$234,170	\$234,170
<b>Other Funding</b>					
New University Funds	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000
New State Appropriation	\$0	\$400,000	\$400,000	\$400,000	\$400,000
Occupancy Costs	\$0	\$0	\$203,138	\$203,138	\$203,138
State Law Library Operations	\$132,800	\$132,800	\$132,800	\$132,800	\$132,800
<b>TOTAL REVENUES</b>	<b>\$8,648,953</b>	<b>\$9,284,536</b>	<b>\$9,740,931</b>	<b>\$9,971,047</b>	<b>\$10,220,101</b>
<b>EXPENSES</b>	<b>Total FY13 Combined Operations</b>	<b>Total FY14 Combined Operations</b>	<b>Total FY15 Combined Operations</b>	<b>Total FY16 Combined Operations</b>	<b>Total FY17 Combined Operations</b>
<b>General Faculty - Salary &amp; Fringes</b>					
Admin	\$509,423	\$509,423	\$509,423	\$509,423	\$509,423
Teaching Faculty	\$3,473,808	\$3,899,808	\$3,924,808	\$3,974,808	\$3,999,808
Admin/Staff - Salary & Fringes	\$811,634	\$877,634	\$1,026,434	\$1,092,434	\$1,092,434
<b>Library</b>					
Library - Salary & Fringes	\$580,661	\$580,661	\$647,782	\$648,903	\$650,024
Library Expenses	\$1,444,122	\$1,610,572	\$1,611,483	\$1,612,248	\$1,613,012
<b>General Expenses</b>	\$1,170,635	\$1,198,135	\$1,220,635	\$1,033,635	\$1,041,135
<b>Financial Aid</b>	\$816,014	\$816,014	\$816,014	\$816,014	\$816,014
<b>Other</b>	\$155,000	\$215,000	\$478,138	\$478,138	\$478,138
<b>TOTAL EXPENSES</b>	<b>\$8,961,298</b>	<b>\$9,707,248</b>	<b>\$10,234,717</b>	<b>\$10,165,602</b>	<b>\$10,199,987</b>
<b>FY NET REVENUE</b>	<b>-\$312,345</b>	<b>-\$422,711</b>	<b>-\$493,787</b>	<b>-\$194,555</b>	<b>\$20,114</b>
<b>Reserves from prior year (unrestricted only)</b>	<b>\$1,712,566</b>	<b>\$1,400,222</b>	<b>\$977,511</b>	<b>\$483,724</b>	<b>\$289,169</b>
<b>Resulting Reserves</b>	<b>\$1,400,222</b>	<b>\$977,511</b>	<b>\$483,724</b>	<b>\$289,169</b>	<b>\$309,283</b>





## MOORE INFORMATION

OPINION RESEARCH • STRATEGIC ANALYSIS

May 15, 2008

TO: Stephen Perez, Director of Admissions

FROM: Bob Moore and Kelly Middendorff

RE: University of Idaho College of Law Market Study

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### **Methodology**

*622 online and telephone interviews conducted among potential law school applicants who had registered for the LSAT in the past school year, in Colorado, Idaho, Oregon, Utah and Washington. The 317 online interviews were conducted April 27-30, 2008, and 305 telephone interviews were conducted April 30-May 4, 2008.*

### **Overview**

A law school campus in Boise is more attractive than a campus in Moscow to potential law school applicants, particularly among Idaho residents.

- The University of Idaho College of Law appears to have special appeal for applicants age 35 and older and those with children, along with respondents who applied to Gonzaga Law School and law schools in Utah.

The most appealing messages about the University of Idaho College of Law and a Boise campus include,

- The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (81% more likely to consider University of Idaho)
- The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (76% more likely)
- The Boise campus would be located across the street from the Idaho Supreme Court (72% more likely)
- The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (71% more likely)

More detailed findings follow.



### ***Top Law School Choice***

Overall, there is no single dominant choice for law schools among respondents today. The top two schools mentioned are University of Washington (18%) and University of Idaho (18%), with the top five rounded out by University of Utah (15%), Lewis and Clark Law School (15%) and Seattle University (15%). Other schools mentioned include University of Oregon (12%), Brigham Young University (11%), University of Colorado (10%), University of Denver (8%), University of California-Los Angeles (8%), Gonzaga University (7%) and Stanford University (7%).

Top choice of law school varies by respondents' current state of residence. Fully, 58% of Idaho residents have applied to University of Idaho, while in Utah, 49% have applied to University of Utah and another 36% have applied to Brigham Young University. The top choices for Washington residents are University of Washington (48%) and Seattle University (45%), while most Oregon residents have applied to Lewis and Clark Law School (37%) and University of Oregon (35%) and most Colorado residents have applied to the University of Colorado (45%) and University of Denver (40%).

Looking at law school choices by age, the University of Idaho is the most popular law school among respondents age 35 and older, while the University of Washington is most popular among respondents under age 25. Respondents age 25-34 have applied equally to University of Utah, Lewis and Clark Law School, University of Washington and University of Idaho.

For both married respondents and respondents with children, the top three law school choices are University of Utah, Brigham Young University and University of Idaho. For respondents in a relationship, but not married, the top three schools are University of Washington, Lewis and Clark Law School and Seattle University. There is no consensus among respondents who are single or who do not have children. There is also no consensus choice based on respondent ethnicity.

The importance of state residence and law school choices is illustrated further when we combine all law schools into individual state categories and compare top choice with respondents' place of residence, as the following table reflects.

***Top Law School Choices By State and Residence***

	All	Idaho	Washington	Oregon	Colorado	Utah
Washington schools	37%	32%	<b>82%</b>	27%	8%	16%
California schools	31%	23%	37%	32%	26%	28%
Oregon schools	29%	14%	25%	<b>75%</b>	12%	9%
Utah schools	24%	41%	3%	3%	2%	<b>81%</b>
Idaho schools	23%	<b>70%</b>	24%	12%	9%	23%
Colorado schools	19%	2%	6%	6%	<b>88%</b>	3%

Still looking at the combination of all in-state schools, non-Caucasian respondents are most likely to apply to Washington and California schools, while there is no consensus choice for Caucasian respondents. Looking at family status, married respondents and respondents with children are most likely to choose Utah schools, while there is no consensus for single respondents, respondents who are in a relationship, but not married and those without children.



## ***University of Idaho College of Law Issues***

### ***Reasons for Not Choosing to Apply***

Among respondents who do not choose to apply to the University of Idaho, location is the leading reason for not considering U of I (41%), followed by “unfamiliar with school/area” (19%), “poor reputation/low rankings” (14%). Another 3% gave some other negative response, including “poor law program,” “low admissions standards,” and “lack of diversity.”

### ***Location***

Just over four-in-ten respondents (43%) are aware the College of Law is located in Moscow. Another 18% believe the College is located in Boise and 2% say it is located elsewhere. The remaining 34% don’t know where the College of Law is located.

Fully 91% of Idaho residents are aware of the College’s Moscow location, as are approximately half of Washington and Utah residents (51% aware in Washington, 49% aware in Utah). However, just 22% of Colorado residents and 28% of Oregon residents are aware of the Moscow location.

Knowledge of the college’s location is higher among those who say they plan to apply to the University of Idaho than those who plan to apply to other schools (68% aware vs. 44% aware). Knowledge of the Moscow location is also higher among respondents who have negative reasons for not considering the College of Law (55% aware) than those who say “location” is their reason for not considering Idaho (38% aware). Only 17% of respondents who say they are not considering the College of Law because they are “unfamiliar” with the college itself know where it is located.

### ***Familiarity***

Overall familiarity with the University of Idaho College of Law is not high today. Just 15% consider themselves to be “familiar” with the College (3% very familiar and 13% fairly familiar), while 83% consider themselves “not familiar” (26% not too familiar, 58% not at all familiar). Again, state of residence plays an important role, as fully 47% of Idaho residents consider themselves familiar with the College, compared to 18% of Washington residents, 17% of Utah residents, 8% of Oregon residents and 3% of Colorado residents.

### ***Interest in Boise and Moscow Campuses***

After hearing the following, “the University of Idaho College of Law is considering opening a new campus in Boise, in addition to its main campus in Moscow,” 34% of respondents overall say they are likely to apply to a University of Idaho College of Law campus in Boise, while 19% are likely to apply to a Moscow campus. A new Boise campus is a more of a draw among respondents in most subgroups, although Washington residents appear equally interested in both locations. Most likely to be interested in a Boise campus are Idaho residents. In addition, the Boise campus is more attractive to respondents age 35 and older than younger respondents, and more attractive to respondents with children than those without children.



***“How likely are you to apply to the University of Idaho College of Law in Boise/Moscow, Idaho?” (% Likely)***

	Boise	Moscow	Boise Advantage
<b><i>All</i></b>	34%	19%	+15%
<b><i>Applicant's state of residence</i></b>			
Idaho	74%	30%	+44%
Washington	29%	26%	+3%
Oregon	33%	13%	+20%
Colorado	17%	9%	+8%
Utah	37%	22%	+15%
<b><i>Age</i></b>			
Under 25	28%	14%	+14%
25-34	35%	19%	+16%
35 and older	49%	36%	+13%
<b><i>Children or dependents?</i></b>			
Yes	49%	29%	+20%
No	29%	16%	+13%

*Proposed Boise Campus Message Testing*

The survey tested nine potential messages about the proposed Boise campus. Four of those messages moved more than seven-in-ten respondents to be “more likely” to consider University of Idaho for law school. The most effective messages include:

- The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (81% more likely to consider University of Idaho)
- The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (76% more likely)
- The Boise campus would be located across the street from the Idaho Supreme Court (72% more likely)
- The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (71% more likely)

Three additional messages moved at least six-in-ten to be more likely to consider University of Idaho, including:

- The Boise campus would be located across the street from the State Capitol (61% more likely)
- Boise has been rated by Forbes Magazine and others as one of America’s most livable cities (60% more likely)
- University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law (60% more likely)

Respondents were more positive than negative about two other messages, but nonetheless, neither generated positive reactions from more than 50%.



- The University of Idaho is the only law school in the northwest that has a law-related universal public service requirement of its graduates (49% more likely)
- The Boise campus would be located only 16 miles from a major ski area (41% more likely)

Less effective than the messages about the Boise campus was a message about the Moscow campus' proximity to cultural events: "the Moscow campus is part of the vibrant residential campus of Idaho's flagship university, known for such events such as the National Medal of Arts-winning Lionel Hampton International Jazz Festival." Only 34% of respondents are more likely to choose Moscow based on this.

The following table illustrates responses to each of the messages tested.

<i>Message Testing</i>			
	More likely	Less likely	Net more likely
The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (Q11)	81%	5%	+76%
The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (Q17)	76%	5%	+71%
The Boise campus would be located across the street from the Idaho Supreme Court (Q8)	72%	6%	+66%
The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (Q12)	71%	9%	+62%
The Boise campus would be located across the street from the State Capitol (Q10)	61%	8%	+53%
Boise has been rated by Forbes Magazine and others as one of America's most livable cities (Q13)	60%	10%	+50%
University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law (Q15)	60%	13%	+47%
The University of Idaho is the only law school in the Northwest that has a law-related universal public service requirement of its graduates (Q9)	49%	21%	+28%
The Boise campus would be located only 16 miles from a major ski area (Q16)	41%	19%	+22%
The Moscow campus is part of the vibrant residential campus of Idaho's flagship university, known for such events such as the National Medal of Arts-winning Lionel Hampton International Jazz Festival (Q14)	34%	20%	+14%



Importantly, the top four messages are all widely effective across all subgroups. There are, however, some differences by subgroup worth noting in the second tier of messages.

- The Boise campus would be located across the street from the State Capitol

***All respondents - 61% more likely***

- Idaho residents (79% more likely) – Colorado and Washington residents were least interested in this
  - Respondents who intend to apply to University of Idaho (76% more likely)
  - Respondents who intend to apply to University of Utah (73% more likely)
  - Respondents who intend to apply to Brigham Young University (72% more likely)
- Boise has been rated by Forbes Magazine and others as one of America's most livable cities

***All respondents - 60% more likely***

- Respondents who intend to apply to University of Idaho (81% more likely)
  - Idaho residents (77% more likely) – Colorado and Washington residents were least interested
  - Respondents who intend to apply to University of Utah (76% more likely)
  - Respondents with children (73% more likely)
  - Married respondents (72% more likely)
- University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law

***All respondents - 60% more likely***

- Respondents who intend to apply to University of Idaho (77% more likely)

*Post-Message School of Choice*

After hearing the ten messages, 37% said they were likely to apply to the University of Idaho College of Law in Boise, while 59% were not likely. By comparison, pre-message testing responses were 34% likely and 61% not likely to apply to the College of Law in Boise. The messages together did not have a significant impact on intentions.

*Visits to Boise and Moscow*

One-in-three respondents (34%) report having visited Boise, and 5% report having visited Moscow. Another 21% say they have visited both cities and the remaining 39% have visited neither city. Idaho residents are the most likely to have visited either one or both cities, while Colorado residents are the least likely to report having visited either. Respondents who have visited Boise or Moscow are more likely to be interested in the University College of Law.

*Private or Public Law School?*

Among respondents with an opinion, attending a public law school is preferred over a private law school almost two-to-one. Indeed, 39% are more inclined to attend a public law school, while 22% are more inclined to attend a private law school. The remaining 39% are undecided. Importantly, respondents who intend to apply to a public law school are more likely to apply to the University of Idaho College of Law than those who prefer a private law school.





**MOORE INFORMATION**

OPINION RESEARCH • STRATEGIC ANALYSIS

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# **University of Idaho College of Law Market Study**

May 2008



# Survey Methodology

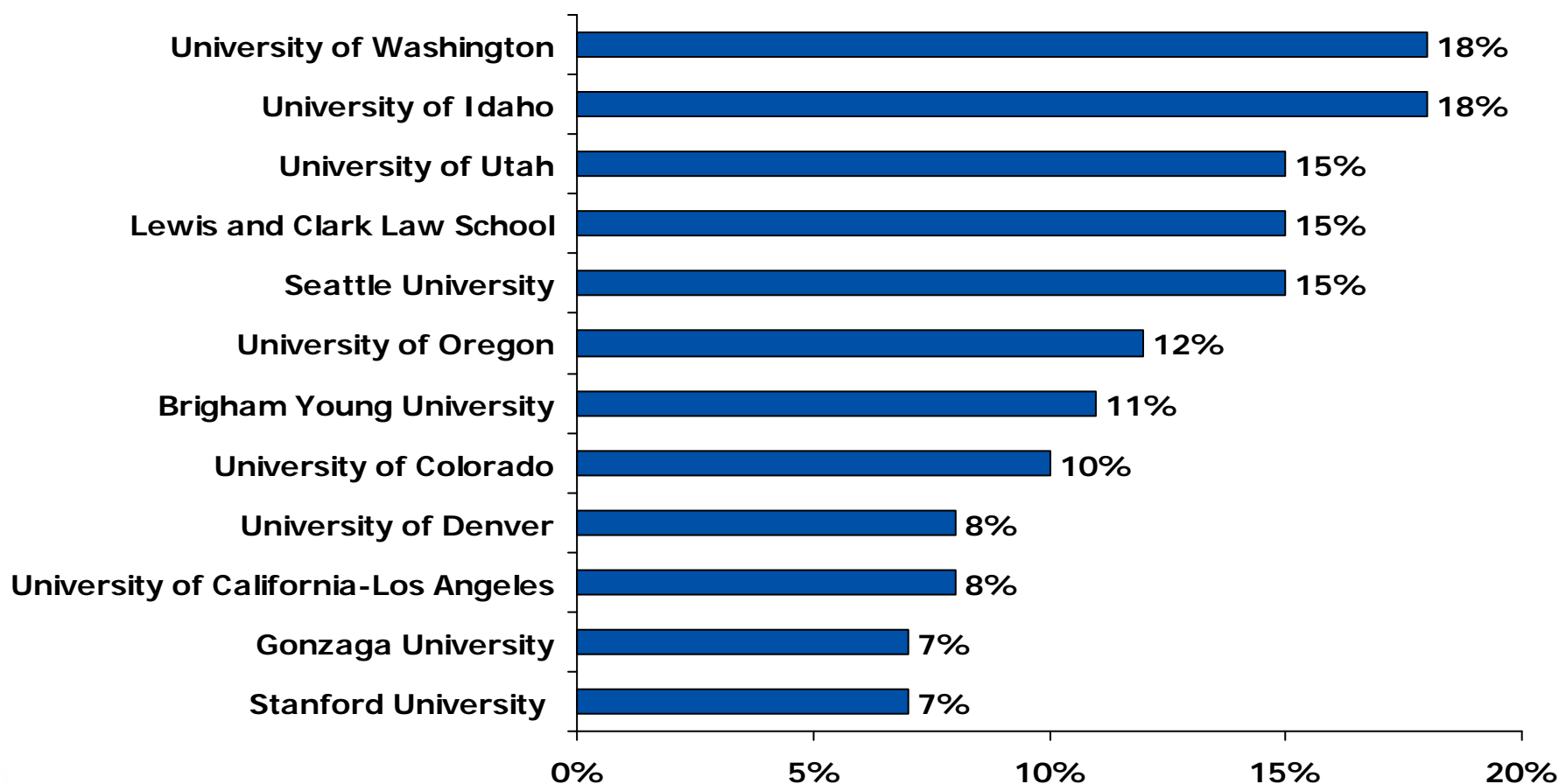
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- Sample
  - 622 Internet and telephone interviews among potential law school applicants who had registered for the LSAT in the past school year, in Oregon, Utah, Washington, Colorado and Idaho
- Method
  - 317 Internet interviews conducted April 27-30, 2008
  - 305 telephone interviews conducted April 30-May 4, 2008
- Sampling error
  - Plus or minus 4% at the 95% confidence level



# Top Law School Choices

"Which law school or schools do you plan to apply to?" (Q2)





# Top Law School Choices:

## *State of Residence*

----- Applicant's State of Residence -----						
	<u>All</u>	<u>Idaho</u>	<u>Washington</u>	<u>Oregon</u>	<u>Colorado</u>	<u>Utah</u>
University of Washington	18%	15%	48%	16%	2%	4%
University of Idaho	18%	58%	21%	10%	7%	17%
University of Utah	15%	25%	2%	1%	2%	49%
Lewis and Clark Law School	15%	6%	15%	37%	5%	5%
Seattle University	15%	4%	45%	6%	3%	5%
University of Oregon	12%	4%	9%	35%	5%	3%
Brigham Young University	11%	17%	1%	1%	1%	36%
University of Colorado	10%	2%	4%	1%	45%	2%
University of Denver	8%	--	1%	2%	40%	1%
University of California-Los Angeles	8%	4%	11%	6%	7%	8%
Gonzaga University	7%	13%	13%	6%	4%	3%
Stanford University	7%	4%	8%	8%	3%	8%



# Top Law School Choices:

## *Age*

---

		----- Applicant's Age -----			
	<u>All</u>	<u>Under 25</u>	<u>25-34</u>	<u>35+</u>	
University of Washington	18%	23%	17%	11%	
University of Idaho	18%	13%	17%	40%	
University of Utah	15%	10%	21%	16%	
Lewis and Clark Law School	15%	13%	19%	10%	
Seattle University	15%	17%	14%	7%	
University of Oregon	12%	12%	14%	7%	
Brigham Young University	11%	8%	13%	14%	
University of Colorado	10%	7%	11%	18%	
University of Denver	8%	5%	10%	13%	
University of California-Los Angeles	8%	11%	5%	7%	
Gonzaga University	7%	7%	7%	8%	
Stanford University	7%	10%	5%	2%	



# Top Law School Choices:

## *Marital Status and Children*

	<u>All</u>	----- Marital Status -----			-- Children or Dependents? --	
		<u>Married</u>	<u>Relationship, not married</u>	<u>Single</u>	<u>Yes</u>	<u>No</u>
University of Washington	18%	12%	25%	20%	8%	22%
University of Idaho	18%	23%	14%	17%	29%	15%
University of Utah	15%	30%	8%	7%	26%	12%
Lewis and Clark Law School	15%	9%	23%	16%	8%	17%
Seattle University	15%	7%	21%	18%	6%	17%
University of Oregon	12%	7%	16%	15%	10%	13%
Brigham Young University	11%	26%	3%	4%	22%	8%
University of Colorado	10%	7%	16%	9%	11%	10%
University of Denver	8%	7%	10%	9%	10%	8%
University of California-Los Angeles	8%	6%	5%	12%	6%	8%
Gonzaga University	7%	7%	8%	7%	9%	7%
Stanford University	7%	7%	6%	7%	4%	7%



# Top Law School Choices:

## *Intended Applications*

		----- "Which law school(s) do you plan to apply to?" -----											
	<u>All</u>	<u>U of WA</u>	<u>U of ID</u>	<u>U. of UT</u>	<u>Lewis and Clark</u>	<u>Seattle U</u>	<u>U of OR</u>	<u>BYU</u>	<u>U of CO</u>	<u>U of Denver</u>	<u>UCLA</u>	<u>Gonzaga</u>	<u>Stanford</u>
University of Washington	18%	100%	20%	5%	24%	53%	23%	4%	13%	8%	28%	24%	27%
University of Idaho	18%	20%	100%	33%	18%	18%	14%	32%	19%	18%	6%	42%	2%
University of Utah	15%	4%	28%	100%	4%	4%	6%	61%	8%	4%	14%	11%	7%
Lewis and Clark Law School	15%	19%	15%	4%	100%	26%	43%	3%	16%	4%	8%	22%	5%
Seattle University	15%	43%	15%	4%	26%	100%	21%	3%	8%	6%	14%	27%	5%
University of Oregon	12%	16%	10%	5%	35%	17%	100%	1%	16%	10%	10%	20%	5%
Brigham Young University	11%	3%	19%	44%	2%	2%	1%	100%	3%	4%	10%	7%	10%
University of Colorado	10%	7%	11%	5%	11%	5%	13%	3%	100%	55%	6%	9%	2%
University of Denver	8%	3%	8%	2%	2%	3%	6%	3%	44%	100%	4%	4%	--
University of California-Los Angeles	8%	12%	3%	7%	4%	8%	6%	7%	5%	4%	100%	--	20%
Gonzaga University	7%	10%	17%	5%	11%	13%	12%	4%	6%	4%	--	100%	2%
Stanford University	7%	10%	1%	3%	2%	2%	3%	6%	2%	--	16%	2%	100%



# Top Law School Choices- by State:

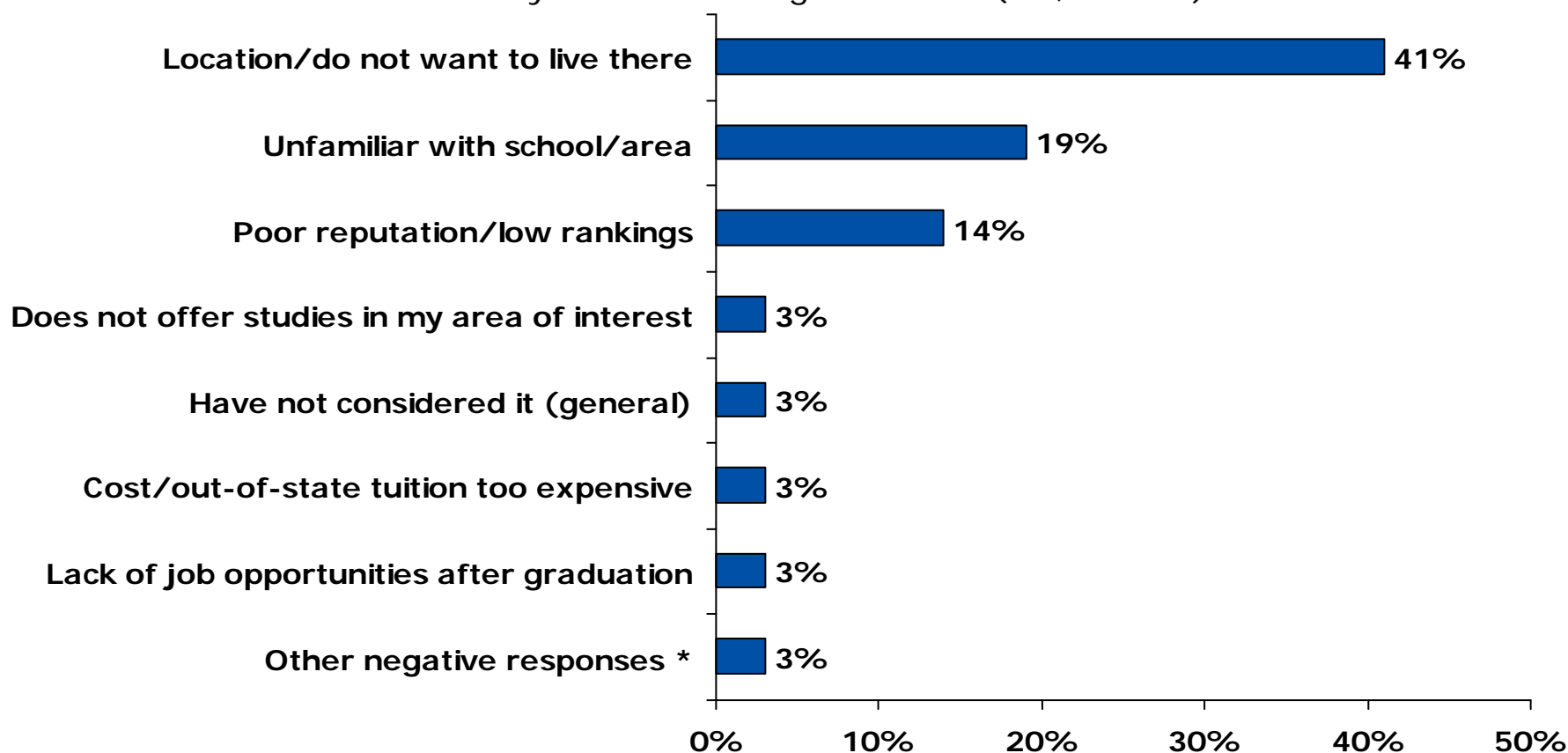
## *State of Residence*

		----- Applicant's State of Residence -----				
	<u>All</u>	<u>Idaho</u>	<u>Washington</u>	<u>Oregon</u>	<u>Colorado</u>	<u>Utah</u>
Washington schools	37%	32%	82%	27%	8%	16%
California schools	31%	23%	37%	32%	26%	28%
Oregon schools	29%	14%	25%	75%	12%	9%
Utah schools	24%	41%	3%	3%	2%	81%
Idaho schools	23%	70%	24%	12%	9%	23%
Colorado schools	19%	2%	6%	6%	88%	3%



# Why Not University of Idaho College of Law?

IF NOT UNIVERSITY OF IDAHO IN Q2: "What is the major reason you are not or did not consider the University of Idaho College of Law?" (Q3, N=508)

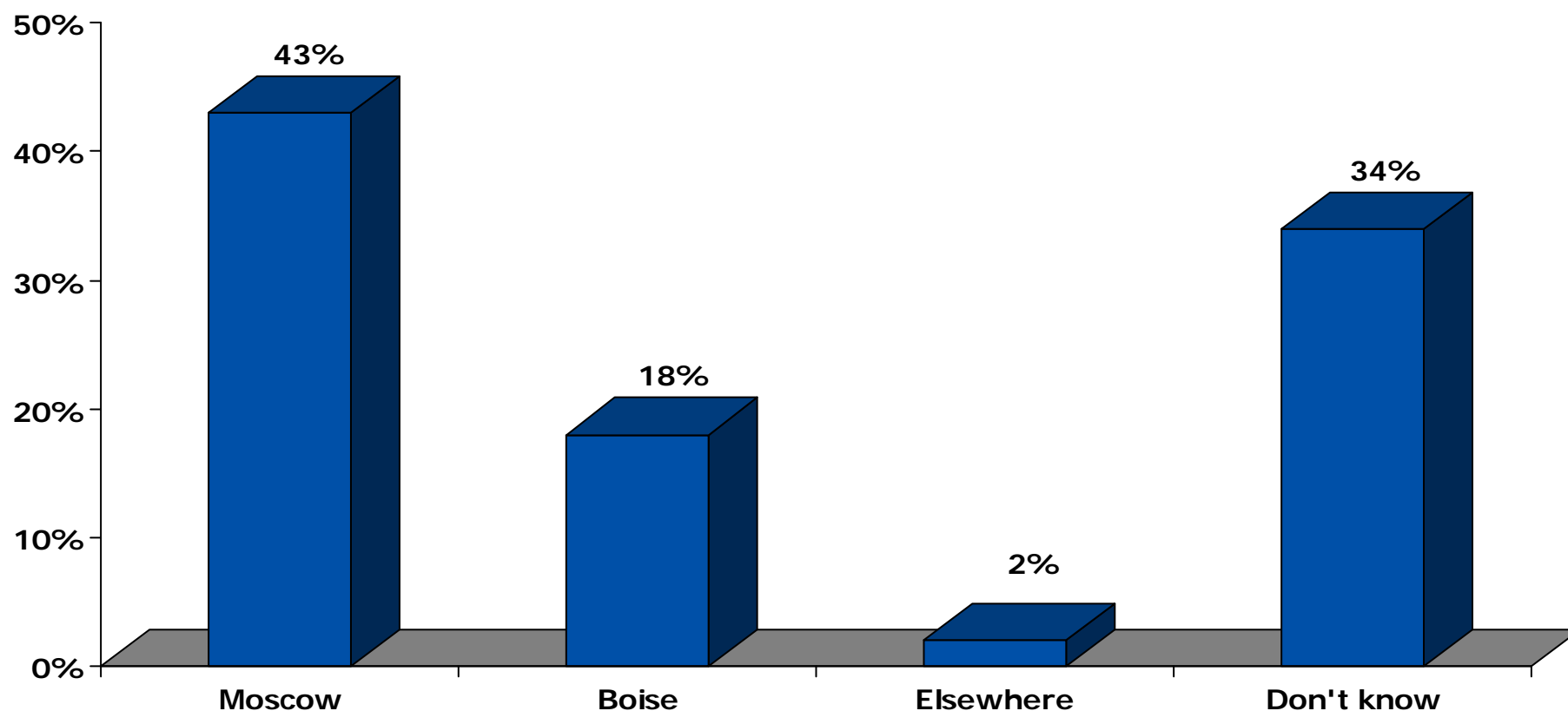


\* Including: poor law program, low admission standards and lack of diversity



# Where is the College of Law Located?

"Can you tell me in what city the University of Idaho College of Law is located?" (Q4)





# College of Law Location?

## *Key Subgroups – 1*

---

	<u>Moscow</u>	<u>Boise</u>	<u>Elsewhere</u>	<u>Don't know</u>
<b><i>All</i></b>	43%	18%	2%	34%
<b><i>Applicant's state of residence</i></b>				
Idaho	91%	--	2%	2%
Washington	51%	14%	1%	33%
Oregon	28%	25%	--	46%
Colorado	22%	20%	2%	53%
Utah	49%	21%	3%	24%
<b><i>Which law school(s) do you plan to apply to?</i></b>				
University of Idaho	68%	12%	1%	12%
Other top choices	46%	19%	2%	36%



# College of Law Location?

## *Key Subgroups – 2*

---

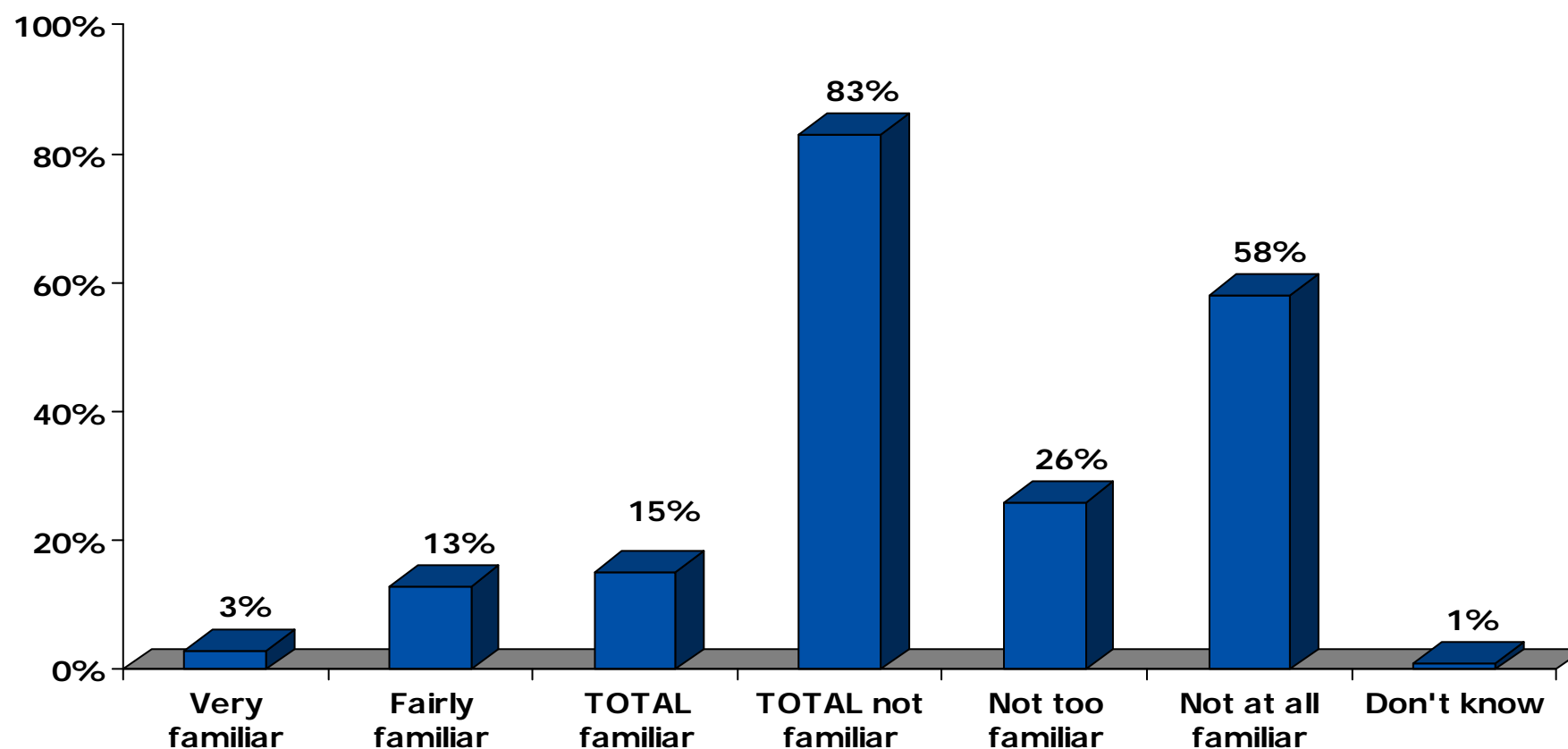
	<u>Moscow</u>	<u>Boise</u>	<u>Elsewhere</u>	<u>Don't know</u>
<b><i>All</i></b>	43%	18%	2%	34%
<b><i>Why not considering U of ID College of Law?</i></b>				
Location	38%	18%	2%	41%
Unfamiliar/have not considered/don't know/nothing	17%	26%	2%	54%
Poor reputation/negative responses	55%	18%	1%	24%
<b><i>Familiarity with U of ID College of Law?</i></b>				
Familiar	94%	1%	--	1%
Not too familiar	66%	13%	*	19%
Not at all familiar	20%	25%	3%	50%

\* Less than one-half of one percent



# Familiarity with College of Law?

"How familiar, if at all, are you with the University of Idaho's College of Law?" (Q5)





# Familiarity with College of Law?

## *State of Residence*

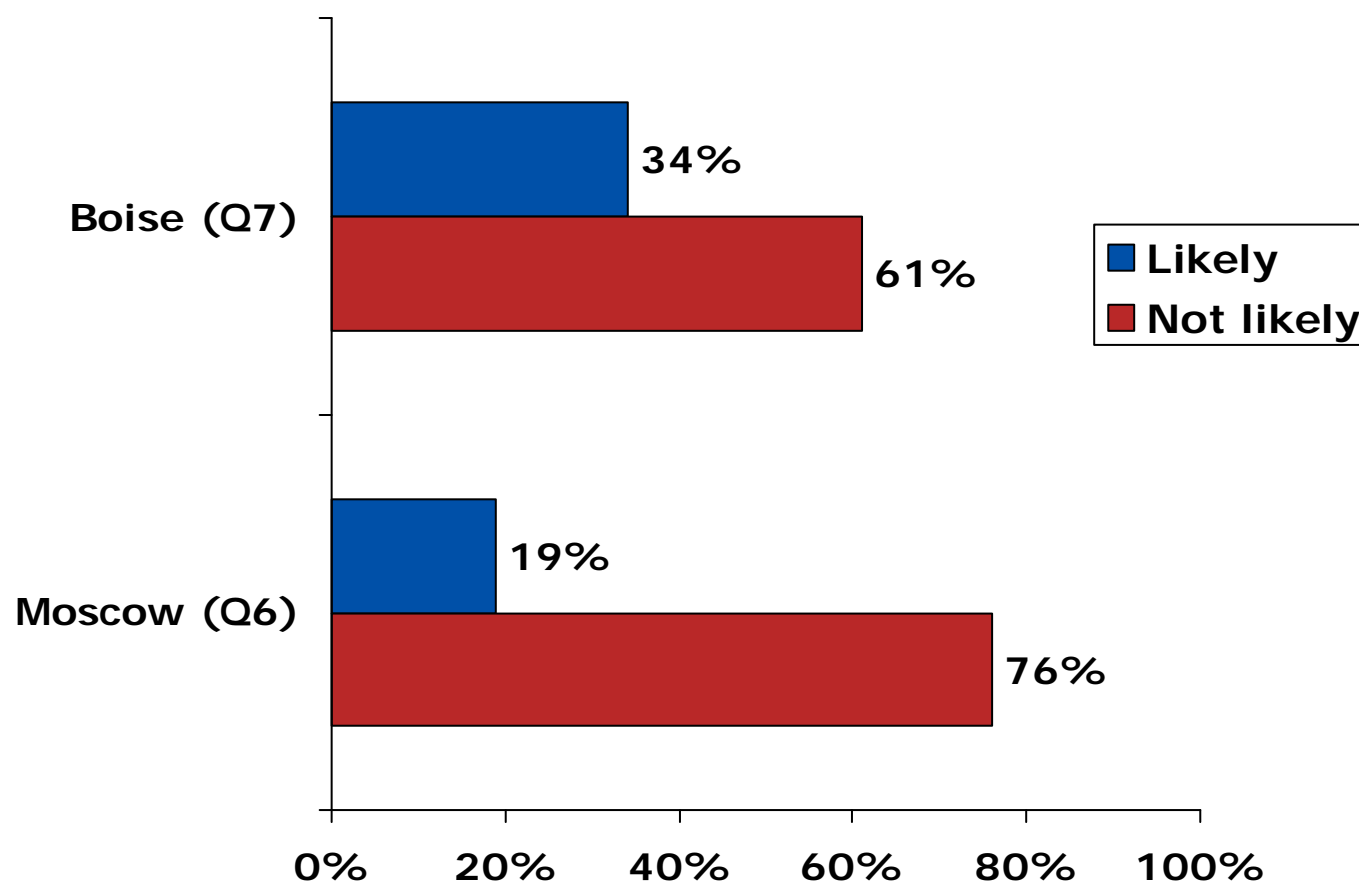
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	<u>TOTAL familiar</u>	<u>TOTAL not familiar</u>	<u>Net familiar</u>
<b><i>All</i></b>	15%	83%	-68%
<b><i>Applicant's state of residence</i></b>			
Idaho	47%	51%	-4%
Washington	18%	81%	-63%
Oregon	8%	90%	-82%
Colorado	3%	95%	-92%
Utah	17%	81%	-64%



# Interest in Boise and Moscow Campuses

"How likely are you to apply to the University of Idaho College of Law in ... ?"





# Interest in Boise and Moscow

## Campuses:

### *Key Subgroups - 1 (% Likely)*

---

	<u>Boise</u>	<u>Moscow</u>	<u>Boise advantage</u>
<b><i>All</i></b>	34%	19%	+15%
<b><i>Applicant's state of residence</i></b>			
Idaho	74%	30%	+44%
Washington	29%	26%	+3%
Oregon	33%	13%	+20%
Colorado	17%	9%	+8%
Utah	37%	22%	+15%
<b><i>Gender</i></b>			
Men	35%	21%	+14%
Women	31%	16%	+15%
<b><i>Age</i></b>			
34 and under	31%	17%	+14%
35+	49%	36%	+13%



# Interest in Boise and Moscow

## Campuses:

### *Key Subgroups - 2 (% Likely)*

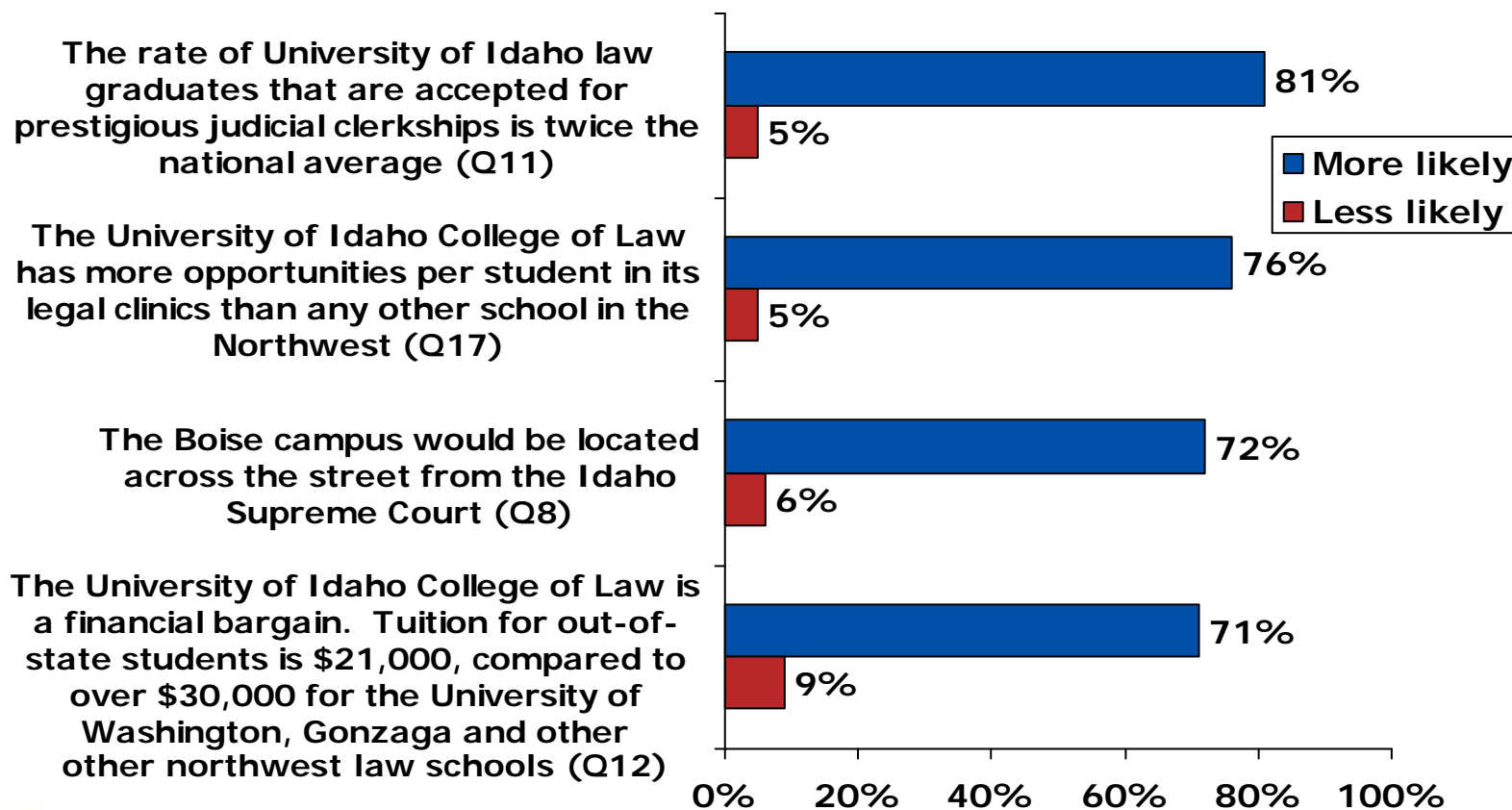
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	<u>Boise</u>	<u>Moscow</u>	<u>Boise advantage</u>
<b><i>All</i></b>	34%	19%	+15%
<b><i>Children or dependents?</i></b>			
Yes	49%	29%	+20%
No	29%	16%	+13%
<b><i>Ever visited Boise or Moscow, Idaho?</i></b>			
Boise	39%	18%	+21%
Both	44%	26%	+18%
Neither	25%	14%	+11%



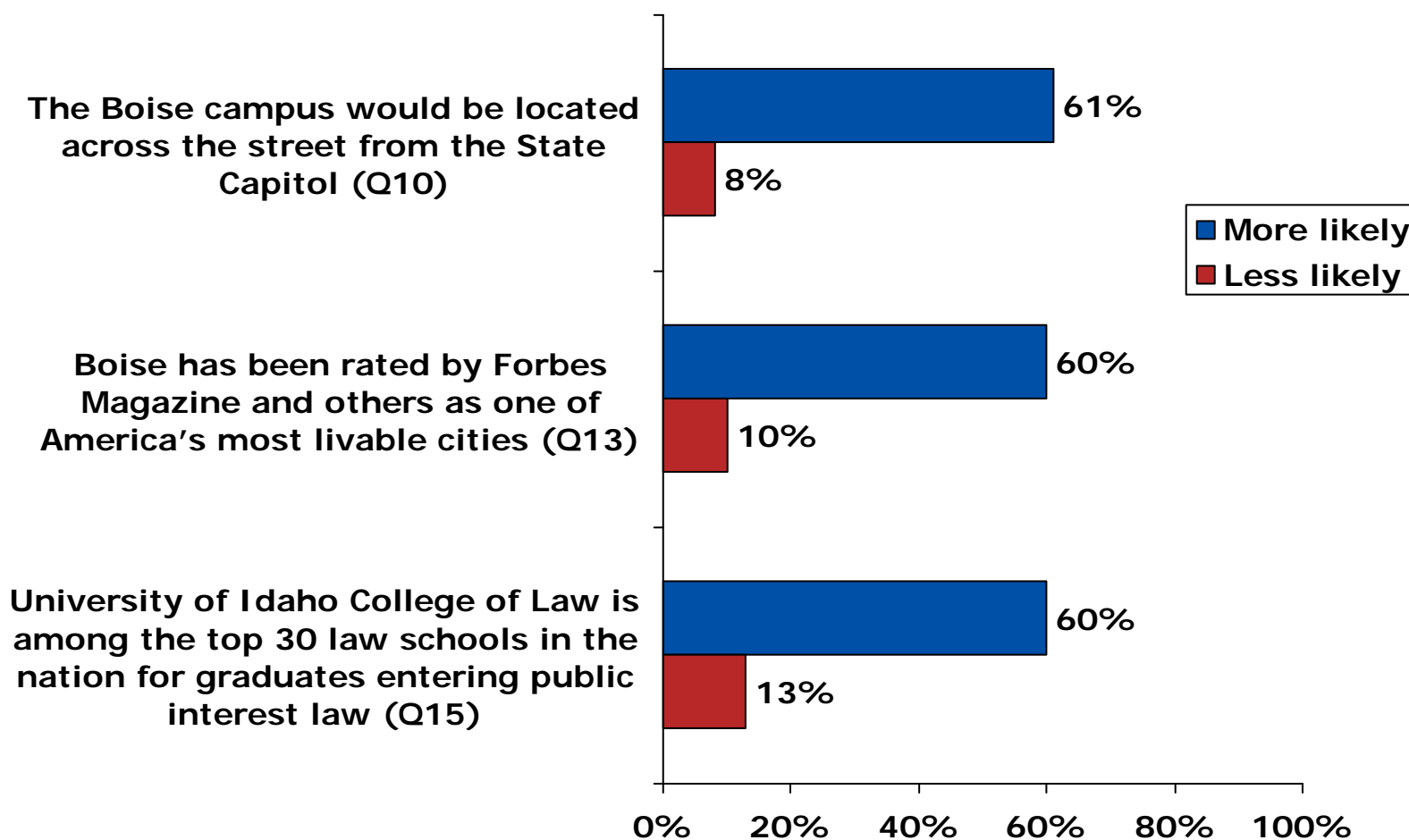
# Potential Boise Campus Messages - 1

"Here are some statements about University of Idaho College of Law and its proposed Boise campus. After hearing each, please tell me if you are more likely or less likely to consider University of Idaho for law school."



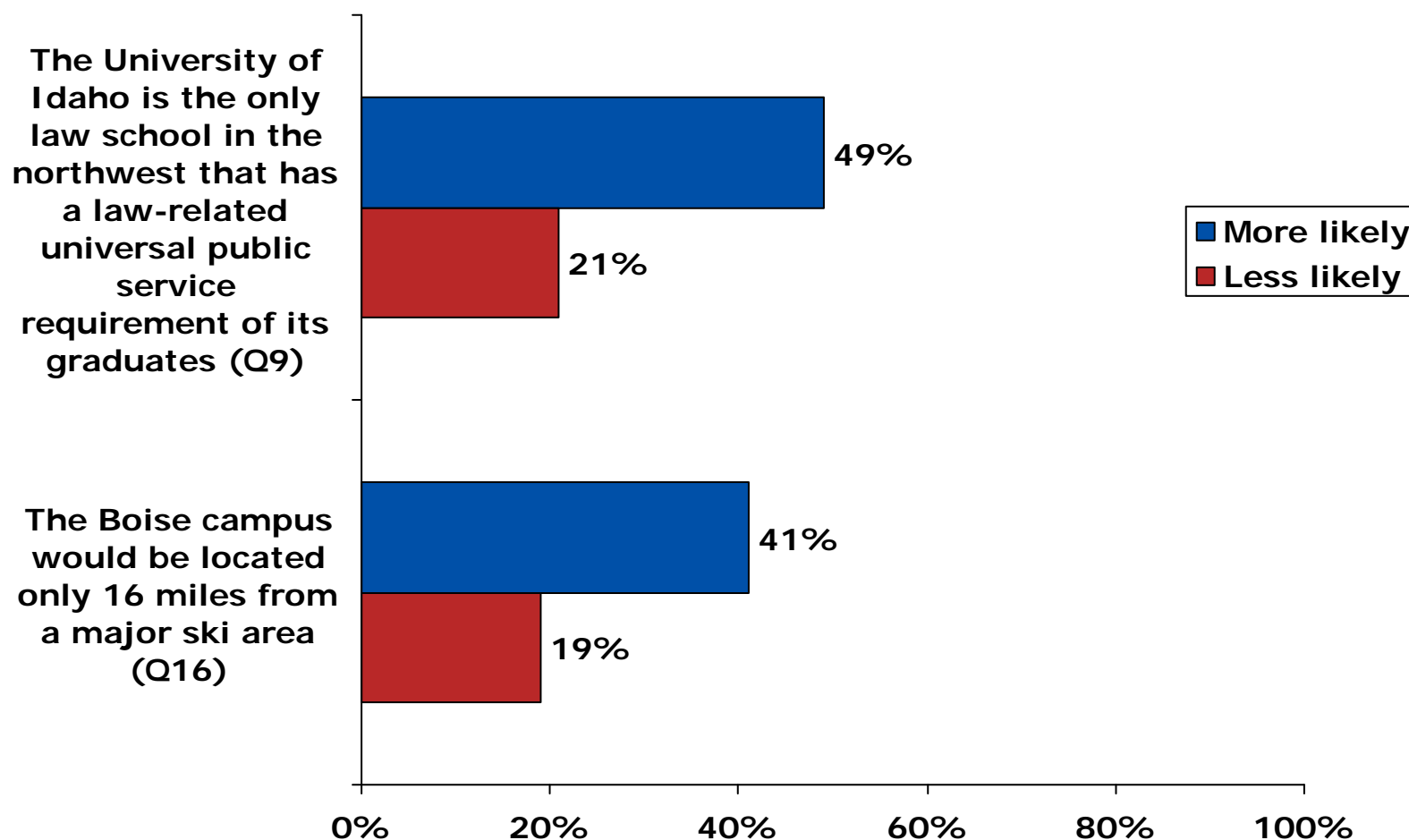


# Potential Boise Campus Messages - 2



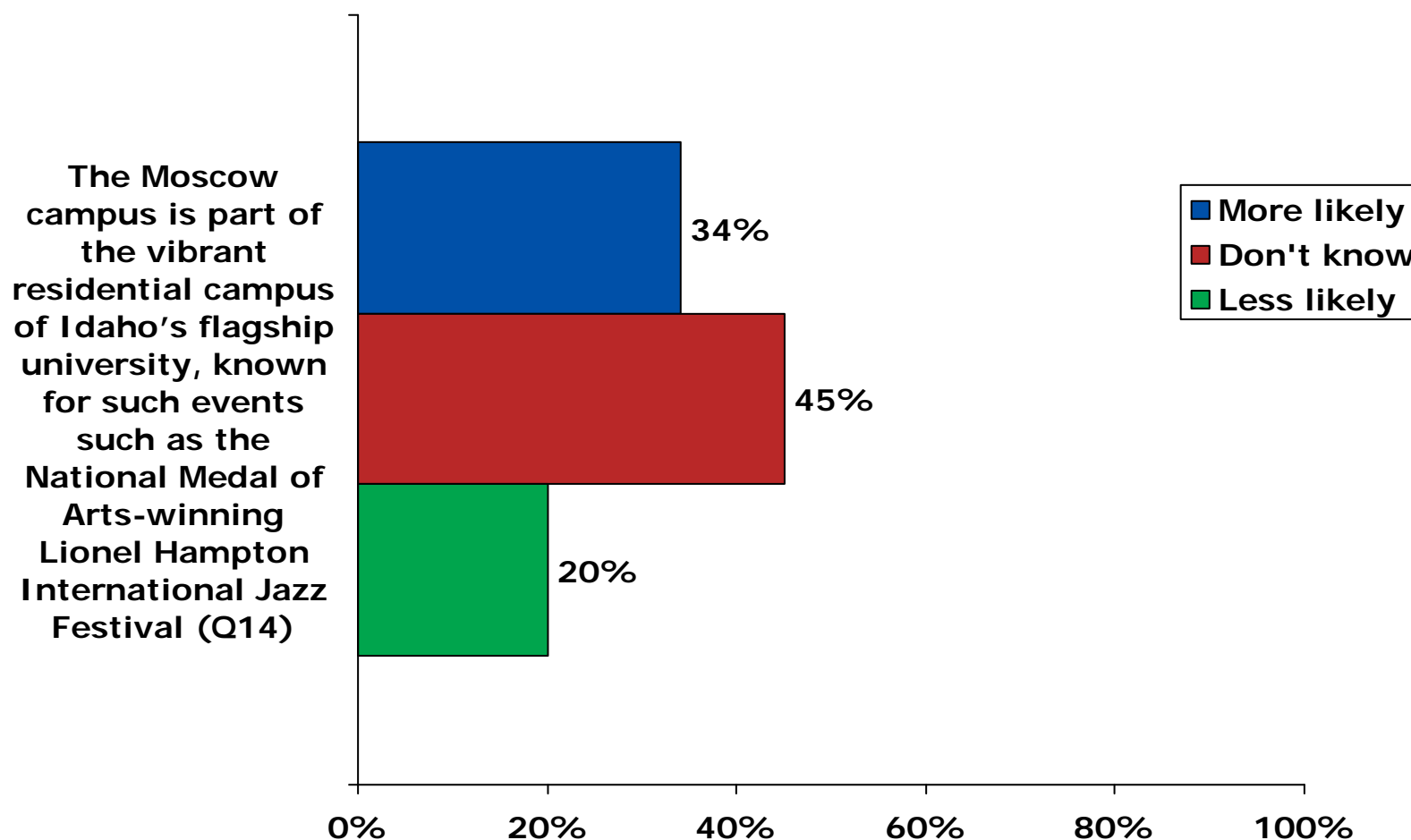


# Potential Boise Campus Messages - 3





# Potential Moscow Campus Message





# Potential Boise Campus Messages:

## *State of Residence (% More Likely)*

		----- Applicant's State of Residence -----				
	<u>All</u>	<u>Idaho</u>	<u>Washington</u>	<u>Oregon</u>	<u>Colorado</u>	<u>Utah</u>
The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (Q11)	81%	81%	78%	81%	80%	86%
The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (Q17)	76%	70%	75%	80%	70%	78%
The Boise campus would be located across the street from the Idaho Supreme Court (Q8)	72%	79%	65%	77%	62%	79%
The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (Q12)	71%	72%	66%	79%	72%	69%
The Boise campus would be located across the street from the State Capitol (Q10)	61%	79%	51%	68%	55%	64%
Boise has been rated by Forbes Magazine and others as one of America's most livable cities (Q13)	60%	77%	50%	65%	56%	63%
University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law (Q15)	60%	57%	65%	67%	48%	57%
The University of Idaho is the only law school in the northwest that has a law-related universal public service requirement of its graduates (Q9)	49%	49%	40%	57%	46%	52%
The Boise campus would be located only 16 miles from a major ski area (Q16)	41%	30%	35%	48%	43%	42%



# Potential Boise Campus Messages:

## *Ethnic Background and Gender (% More Likely)*

	<u>All</u>	<i>-- Ethnic Background --</i>		<i>---- Gender ----</i>	
		<u>White</u>	<u>Non-white</u>	<u>Men</u>	<u>Women</u>
The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (Q11)	81%	83%	75%	83%	79%
The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (Q17)	76%	77%	74%	75%	76%
The Boise campus would be located across the street from the Idaho Supreme Court (Q8)	72%	73%	67%	76%	66%
The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (Q12)	71%	73%	64%	72%	70%
The Boise campus would be located across the street from the State Capitol (Q10)	61%	62%	60%	63%	58%
Boise has been rated by Forbes Magazine and others as one of America's most livable cities (Q13)	60%	61%	57%	61%	58%
University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law (Q15)	60%	61%	57%	58%	63%
The University of Idaho is the only law school in the northwest that has a law-related universal public service requirement of its graduates (Q9)	49%	48%	57%	45%	57%
The Boise campus would be located only 16 miles from a major ski area (Q16)	41%	42%	34%	43%	37%



# Potential Boise Campus Messages:

## *Children and Been to Boise/Moscow*

### *(% More Likely)*

	<u>All</u>	<i>--- Children or Dependents? ---</i>		<i>---- Ever Visited Boise or Moscow? ----</i>	
		<u>Yes</u>	<u>No</u>	<u>Boise</u>	<u>Neither</u>
The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (Q11)	81%	81%	82%	87%	80%
The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (Q17)	76%	74%	77%	78%	76%
The Boise campus would be located across the street from the Idaho Supreme Court (Q8)	72%	77%	71%	79%	69%
The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (Q12)	71%	71%	71%	74%	71%
The Boise campus would be located across the street from the State Capitol (Q10)	61%	68%	60%	65%	60%
Boise has been rated by Forbes Magazine and others as one of America's most livable cities (Q13)	60%	73%	56%	62%	62%
University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law (Q15)	60%	59%	60%	61%	58%
The University of Idaho is the only law school in the northwest that has a law-related universal public service requirement of its graduates (Q9)	49%	49%	49%	51%	50%
The Boise campus would be located only 16 miles from a major ski area (Q16)	41%	34%	43%	45%	40%



# Potential Boise Campus Messages:

## *Intended Applications - 1*

### *(% More Likely)*

		<i>"Which law school(s) do you plan to apply to?"</i>					
	<u>All</u>	<u>U of WA</u>	<u>U of ID</u>	<u>U of UT</u>	<u>Lewis and Clark</u>	<u>Sea-ttle U</u>	<u>U of OR</u>
The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (Q11)	81%	79%	89%	89%	81%	78%	77%
The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (Q17)	76%	77%	89%	89%	77%	72%	78%
The Boise campus would be located across the street from the Idaho Supreme Court (Q8)	72%	74%	80%	81%	72%	65%	70%
The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (Q12)	71%	70%	86%	74%	70%	66%	73%
The Boise campus would be located across the street from the State Capitol (Q10)	61%	59%	76%	73%	62%	53%	65%
Boise has been rated by Forbes Magazine and others as one of America's most livable cities (Q13)	60%	57%	81%	76%	65%	51%	60%
University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law (Q15)	60%	63%	77%	61%	67%	64%	64%
The University of Idaho is the only law school in the northwest that has a law-related universal public service requirement of its graduates (Q9)	49%	43%	71%	55%	53%	45%	52%
The Boise campus would be located only 16 miles from a major ski area (Q16)	41%	47%	45%	43%	52%	45%	48%



# Potential Boise Campus Messages:

## *Intended Applications - 2*

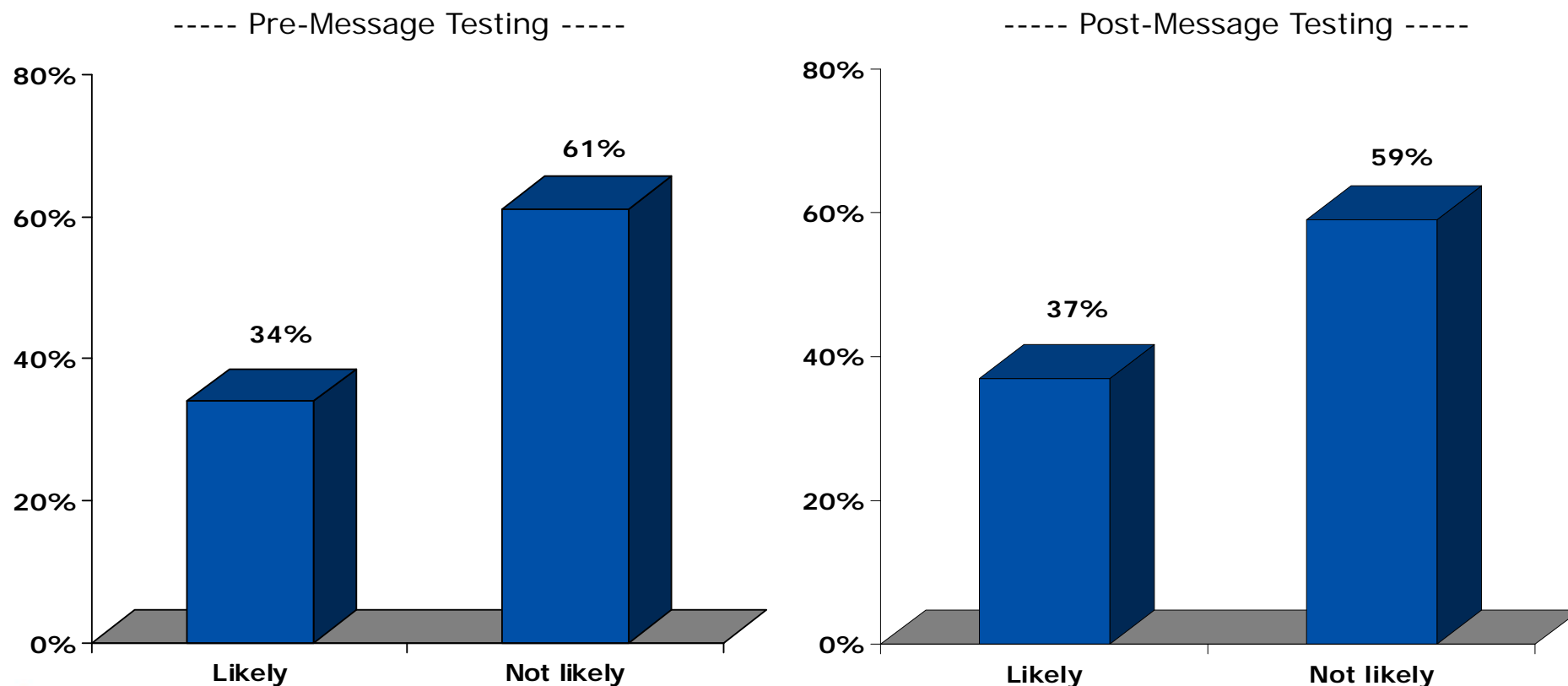
### *(% More Likely)*

		“Which law school(s) do you plan to apply to?”					
	All	BYU	U of CO	U of Denver	UCLA	Gon- zaga	Stan- ford
The rate of University of Idaho law graduates that are accepted for prestigious judicial clerkships is twice the national average (Q11)	81%	90%	86%	78%	78%	82%	93%
The University of Idaho College of Law has more opportunities per student in its legal clinics than any other school in the Northwest (Q17)	76%	81%	71%	71%	62%	87%	78%
The Boise campus would be located across the street from the Idaho Supreme Court (Q8)	72%	83%	63%	65%	60%	71%	68%
The University of Idaho College of Law is a financial bargain. Tuition for out-of-state students is \$21,000, compared to over \$30,000 for the University of Washington, Gonzaga and other northwest law schools (Q12)	71%	72%	68%	73%	68%	84%	68%
The Boise campus would be located across the street from the State Capitol (Q10)	61%	72%	56%	59%	58%	69%	59%
Boise has been rated by Forbes Magazine and others as one of America’s most livable cities (Q13)	60%	68%	57%	63%	56%	67%	56%
University of Idaho College of Law is among the top 30 law schools in the nation for graduates entering public interest law (Q15)	60%	64%	51%	49%	54%	67%	46%
The University of Idaho is the only law school in the northwest that has a law-related universal public service requirement of its graduates (Q9)	49%	52%	43%	39%	38%	49%	51%
The Boise campus would be located only 16 miles from a major ski area (Q16)	41%	35%	41%	39%	44%	42%	32%



# Comparing Interest in U of I College of Law in Boise After Message Testing

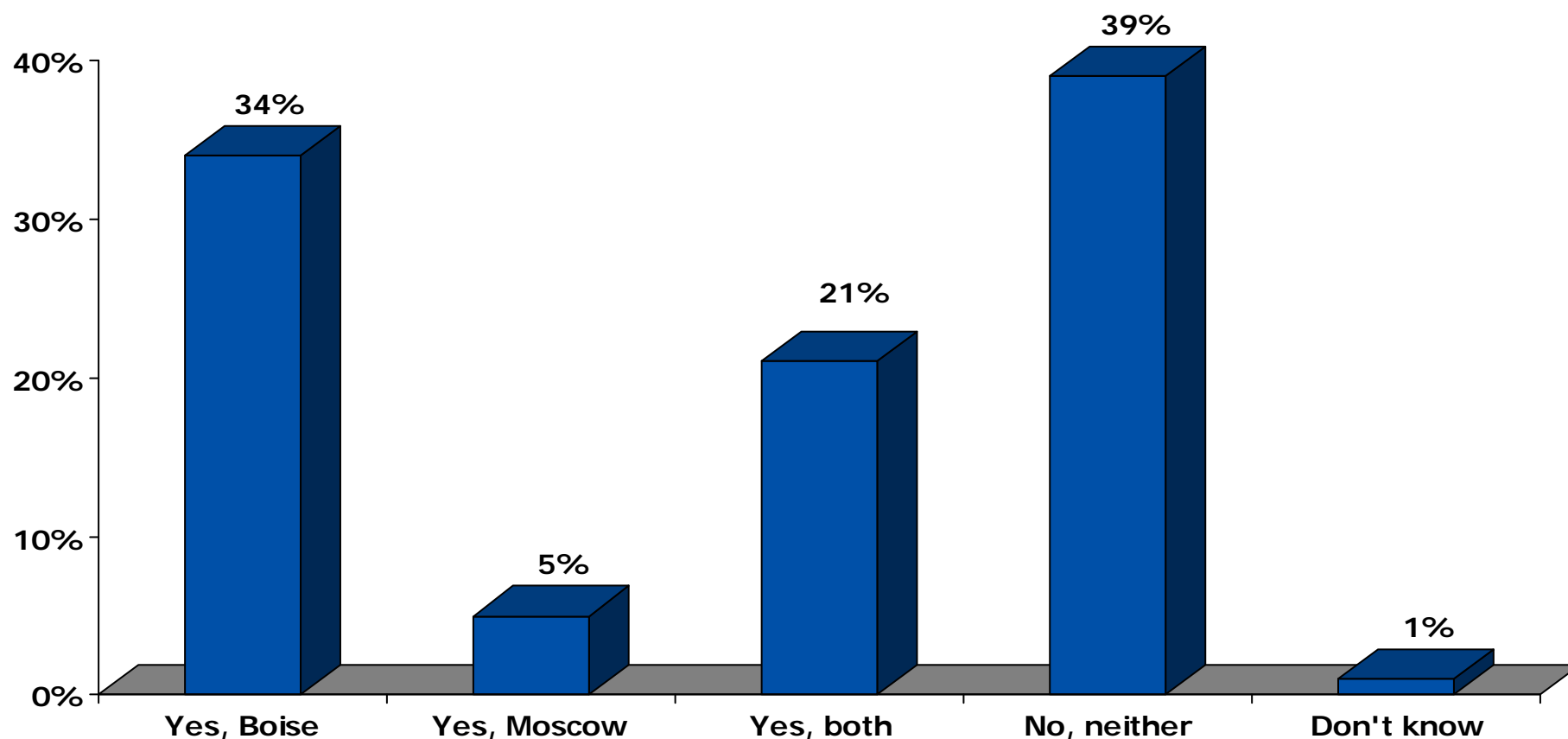
"How likely are you to apply to the University of Idaho College of Law in Boise, Idaho?"





# Visits to Boise and Moscow

"Have you ever visited Boise or Moscow, Idaho?" (Q19)





# Visits to Boise and Moscow:

## *State of Residence*

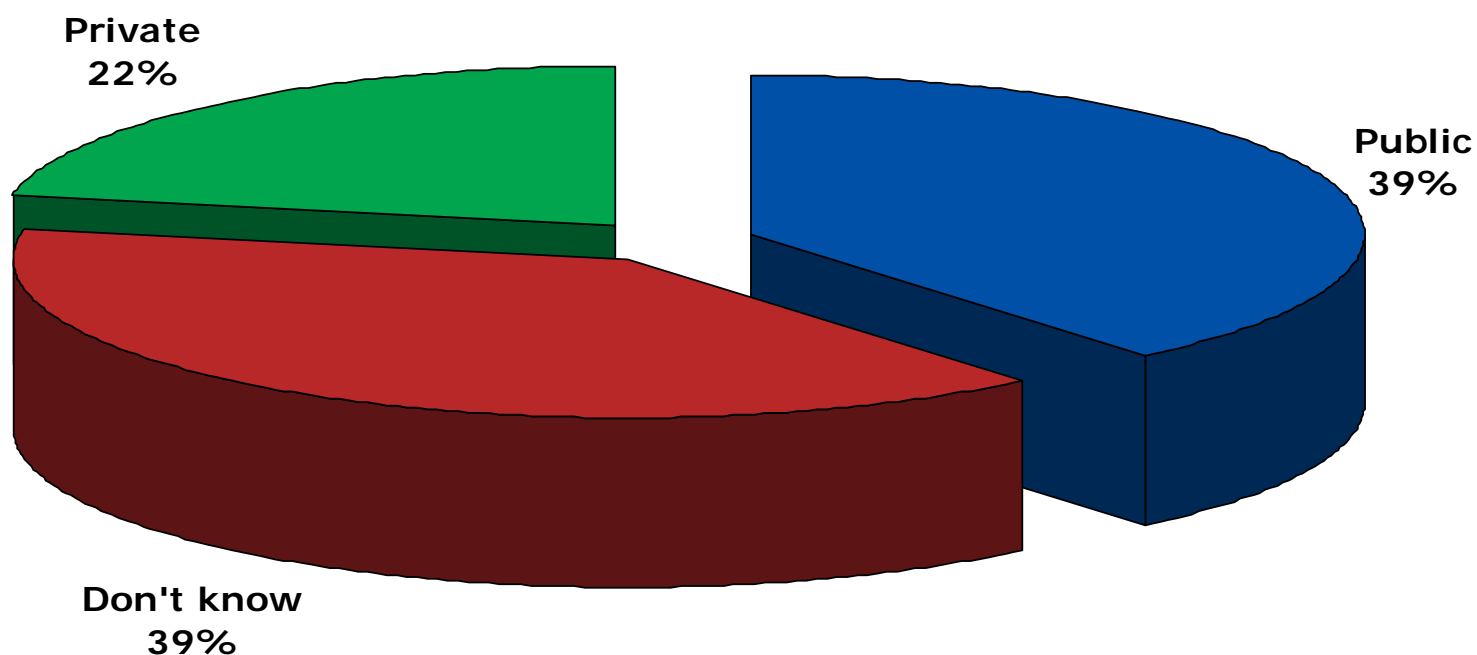
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	<u>Yes, Boise</u>	<u>Yes, Moscow</u>	<u>Yes, both</u>	<u>No, neither</u>	<u>Don't know</u>
<b><i>All</i></b>	34%	5%	21%	39%	1%
<b><i>Applicant's state of residence</i></b>					
Idaho	47%	4%	45%	4%	--
Washington	21%	13%	33%	32%	2%
Oregon	40%	3%	17%	40%	1%
Colorado	14%	2%	6%	78%	--
Utah	52%	2%	17%	29%	1%



# Private or Public Law School

"Are you more inclined to attend a public law school or a private law school?" (Q20)





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2. IF YES: Which law school or schools do you plan to apply to?

		26. STATE					27. GENDER		21.1 AGE					25.1 ETHNIC BACKGROUND					23.1 MARITAL STATUS			24.1 CHILDREN OR DEPENDENTS		22.1 EN-ROLLED IN COLLEGE OR UNIVERSITY	
		Idaho	Wash- ing- ton	Ore- gon	Colo- rado	Utah	male	fem.	undr 25	25- 29	30- 34	35+		Cau- cas- ian	His- pan- ic	Afr. Am- eri- can	Asian	othr	mar- ried	re- lat/ not mar.	sin- gle	yes	no	no	yes
	TOTAL	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----		-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
University of Washington	115 18%	8 15%	76 48%	23 16%	2 2%	6 4%	71 18%	44 20%	60 23%	37 18%	8 12%	9 11%		89 18%	6 15%	5 29%	8 36%	3 9%	26 12%	38 25%	48 20%	11 8%	103 22%	24 23%	36 23%
University of Idaho	114 18%	31 58%	34 21%	14 10%	8 7%	27 17%	75 19%	39 17%	35 13%	37 18%	9 14%	33 40%		90 18%	11 28%	1 6%	6 27%	4 13%	49 23%	22 14%	41 17%	40 29%	73 15%	16 15%	19 12%
University of Utah	96 15%	13 25%	3 2%	2 1%	2 2%	76 49%	73 18%	23 10%	27 10%	42 21%	13 20%	13 16%		88 18%	4 10%	1 6%	2 9%	1 3%	63 30%	13 8%	18 7%	36 26%	58 12%	8 8%	19 12%
Lewis and Clark	93 15%	3 6%	24 15%	53 37%	6 5%	7 5%	55 14%	38 17%	34 13%	36 18%	14 22%	8 10%		82 16%	4 10%	2 12%	2 9%	3 9%	18 9%	35 23%	39 16%	11 8%	81 17%	16 15%	18 11%
Seattle University	92 15%	2 4%	71 45%	9 6%	3 3%	7 5%	49 12%	43 19%	46 17%	33 16%	5 8%	6 7%		70 14%	8 21%	3 18%	7 32%	4 13%	14 7%	33 21%	43 18%	8 6%	82 17%	18 17%	28 18%
University of Oregon	77 12%	2 4%	14 9%	51 35%	5 5%	5 3%	43 11%	34 15%	32 12%	29 14%	9 14%	6 7%		60 12%	7 18%	1 6%	4 18%	4 13%	15 7%	25 16%	36 15%	14 10%	63 13%	12 11%	20 13%
Brigham Young University	69 11%	9 17%	2 1%	1 1%	1 1%	56 36%	56 14%	13 6%	22 8%	29 14%	5 8%	12 14%		61 12%	2 5%	2 12%	2 9%	1 3%	54 26%	5 3%	9 4%	31 22%	37 8%	6 6%	16 10%
University of Colorado	63 10%	1 2%	7 4%	2 1%	50 45%	3 2%	35 9%	28 13%	19 7%	21 10%	8 12%	15 18%		51 10%	4 10%	1 6%	1 5%	2 6%	15 7%	24 16%	23 9%	16 11%	47 10%	11 10%	8 5%
University of Denver	51 8%	-	2 1%	3 2%	44 40%	2 1%	27 7%	24 11%	13 5%	18 9%	9 14%	11 13%		41 8%	3 8%	2 12%	1 5%	2 6%	15 7%	15 10%	21 9%	14 10%	37 8%	8 8%	5 3%
University of California- Los Angeles	50 8%	2 4%	18 11%	9 6%	8 7%	13 8%	34 9%	16 7%	29 11%	11 5%	3 5%	6 7%		36 7%	5 13%	2 12%	4 18%	1 3%	12 6%	8 5%	28 12%	9 6%	40 8%	13 12%	16 10%
Gonzaga University	45 7%	7 13%	21 13%	8 6%	4 4%	5 3%	31 8%	14 6%	19 7%	16 8%	3 5%	7 8%		36 7%	3 8%	1 6%	2 9%	1 3%	15 7%	12 8%	17 7%	13 9%	31 7%	7 7%	12 8%
Stanford University	41 7%	2 4%	12 8%	11 8%	3 3%	13 8%	30 8%	11 5%	27 10%	9 4%	3 5%	2 2%		32 6%	4 10%	1 6%	-	2 6%	15 7%	10 6%	16 7%	6 4%	35 7%	8 8%	19 12%
Georgetown University	36 6%	2 4%	7 4%	10 7%	9 8%	8 5%	25 6%	11 5%	21 8%	10 5%	4 6%	1 1%		33 7%	1 3%	-	1 5%	-	15 7%	10 6%	11 5%	4 3%	32 7%	10 9%	11 7%



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## 27. Gender

	26. STATE						27. GENDER		21.1 AGE					25.1 ETHNIC BACKGROUND					23.1 MARITAL STATUS			24.1 CHILDREN OR DEPENDENTS		22.1 ENROLLED IN COLLEGE OR UNIVERSITY	
	Idaho	Wash- ing- ton	Ore- gon	Colo- rado	Utah		male	fem.	undr 25	25- 29	30- 34	35+		Cau- cas- ian	His- pan- ic	Afr. Am- eri- can	Asian	othr	mar- ried	re- lat/ not mar.	sin- gle	yes	no	no	yes
TOTAL	----	-----	-----	-----	-----		-----	-----	-----	-----	-----	-----		-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
male	399 64%	37 70%	86 54%	83 57%	69 63%	124 80%	399 100%	-	154 58%	153 76%	44 68%	44 53%		332 67%	26 67%	5 29%	10 45%	15 47%	162 77%	79 51%	150 62%	97 69%	295 62%	61 58%	93 58%
female	223 36%	16 30%	73 46%	62 43%	41 37%	31 20%	- 100%	223	112 42%	48 24%	21 32%	39 47%		166 33%	13 33%	12 71%	12 55%	17 53%	49 23%	75 49%	93 38%	43 31%	178 38%	45 42%	67 42%
TOTAL	622 100%	53 100%	159 100%	145 100%	110 100%	155 100%	399 100%	223 100%	266 100%	201 100%	65 100%	83 100%		498 100%	39 100%	17 100%	22 100%	32 100%	211 100%	154 100%	243 100%	140 100%	473 100%	106 100%	160 100%



UNIVERSITY OF IDAHO - LSAT REGISTRANT SURVEY - APRIL 2008

## 27. Gender

	2.1 WHICH LAW SCHOOL OR SCHOOLS DO YOU PLAN TO APPLY TO?													3.1 WHY DID YOU NOT CONSIDER THE U of I COLLEGE OF LAW?			4.1 WHERE IS THE U of I COLLEGE OF LAW LOCATED?			5.1 FAMILIAR WITH U of I COLLEGE OF LAW?		
	TOTAL	U of Was-hington	U of Idaho	U of Utah	Lewis and Clark	Sea-ttle U.	U of Oregon	BYU	U of Col-or-ado	U of Den-ver	UCLA	Gon-zaga	Stan-ford	loc-at-ion	un-fam/not cons.	nega-tive	Boise	Mos-cow	dont know	fam-il-iar	not too fam.	not at all fam.
male	399 64%	71 62%	75 66%	73 76%	55 59%	49 53%	43 56%	56 81%	35 56%	27 53%	34 68%	31 69%	30 73%	126 61%	85 65%	61 73%	82 72%	192 71%	111 52%	63 66%	114 71%	218 61%
female	223 36%	44 38%	39 34%	23 24%	38 41%	43 47%	34 44%	13 19%	28 44%	24 47%	16 32%	14 31%	11 27%	82 39%	46 35%	23 27%	32 28%	77 29%	103 48%	32 34%	46 29%	140 39%
TOTAL	622 100%	115 100%	114 100%	96 100%	93 100%	92 100%	77 100%	69 100%	63 100%	51 100%	50 100%	45 100%	41 100%	208 100%	131 100%	84 100%	114 100%	269 100%	214 100%	95 100%	160 100%	358 100%



## 27. Gender

		6.1 HOW LIKELY ARE YOU TO APPLY TO THE UNIVERSITY OF IDAHO COLLEGE OF LAW IN MOSCOW, IDAHO?							7.1 HOW LIKELY ARE YOU TO APPLY TO THE UNIVERSITY OF IDAHO COLLEGE OF LAW IN BOISE, IDAHO?							18.1 APPLY TO U of I COLLEGE OF LAW BOISE?		19.1 HAVE YOU EVER VISITED BOISE OR MOSCOW IDAHO?			20. INCLINED TO ATTEND A PUBLIC OR PVT. LAW SCHOOL?		
	TOTAL	very lik-ely	frly lik-ely	tot. lik-ely	tot. un-lik-ely	not too lik-ely	not at all lik.	very lik-ely	frly lik-ely	tot. lik-ely	tot. un-lik-ely	not too lik-ely	not at all lik.	lik-ely	not lik-ely	Boise	both	no, nthr	pu-blic	dont know	pri-vate		
	----	----	-----	-----	-----	-----	-----	----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----		
male	399 64%	29 64%	56 75%	85 71%	300 64%	106 68%	194 61%	72 75%	69 61%	141 67%	239 63%	108 68%	131 60%	161 70%	228 62%	152 72%	89 67%	138 57%	152 63%	162 66%	85 63%		
female	223 36%	16 36%	19 25%	35 29%	171 36%	49 32%	122 39%	24 25%	45 39%	69 33%	141 37%	52 33%	89 40%	70 30%	142 38%	59 28%	44 33%	104 43%	89 37%	83 34%	51 38%		
TOTAL	622 100%	45 100%	75 100%	120 100%	471 100%	155 100%	316 100%	96 100%	114 100%	210 100%	380 100%	160 100%	220 100%	231 100%	370 100%	211 100%	133 100%	242 100%	241 100%	245 100%	136 100%		



# Report:Internal Student Survey--Summary

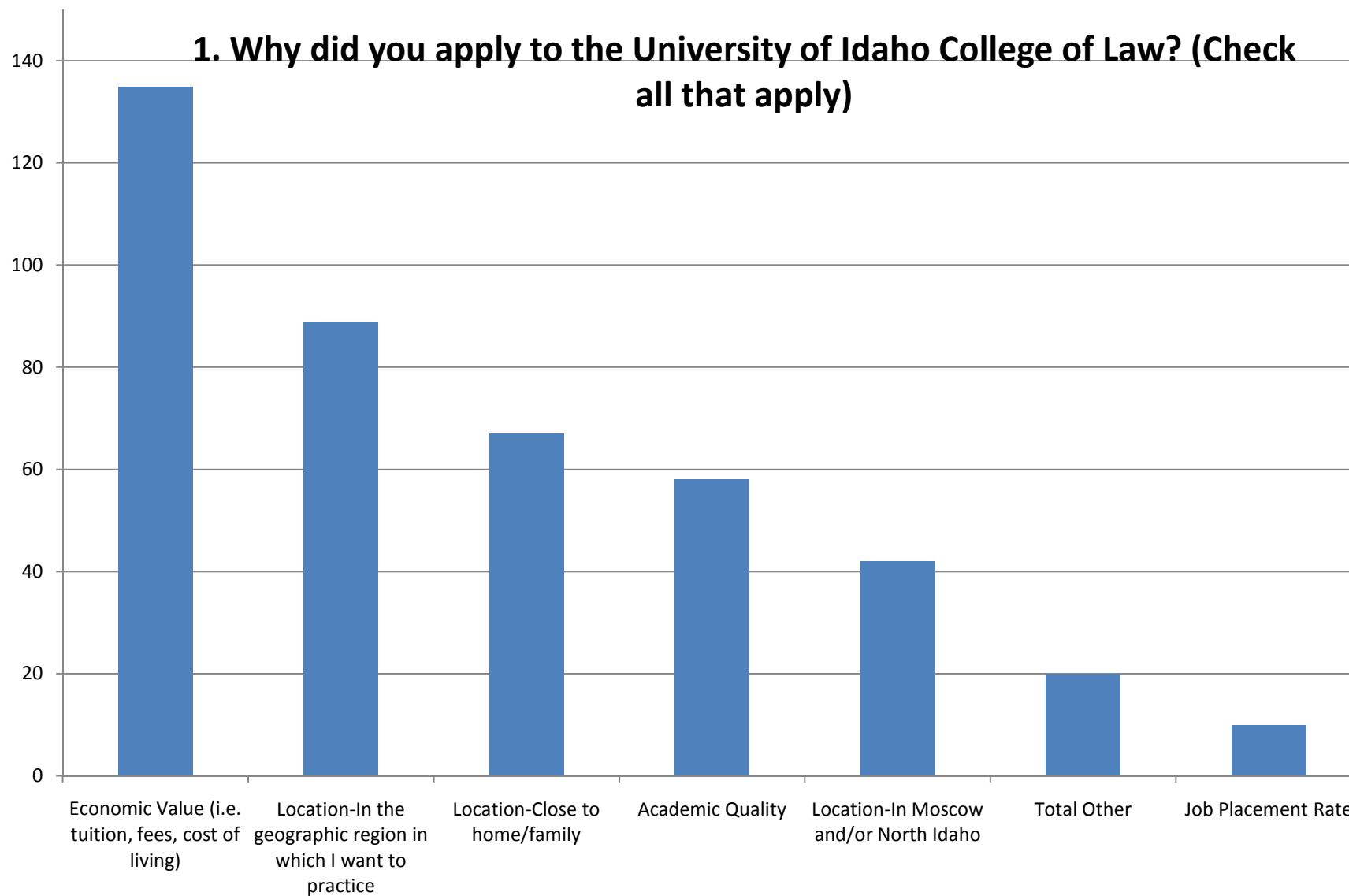
Date Run: Oct 18, 2007 12:09

## 1. Why did you apply to the University of Idaho College of Law? (Check all that apply)

Value	Count	Percent
Economic Value (i.e. tuition, fees, cost of living)	135	91.2%
Location-In the geographic region in which I want to practice	89	60.1%
Location-Close to home/family	67	45.3%
Academic Quality	58	39.2%
Location-In Moscow and/or North Idaho	42	28.4%
Total Other	20	13.5%
Job Placement Rate	10	6.8%
Alumni recommendation:Other	5	3.4%
Scholarship:Other	2	1.4%
Only law school in Idaho:Other	2	1.4%
Close to where I went to undergrad:Other	1	0.7%
water resources program:Other	1	0.7%
small law school:Other	1	0.7%
I Like Idaho:Other	1	0.7%
I was treated as an individual in the application process.:Other	1	0.7%
Steve is a good recruiter.:Other	1	0.7%
It was close to other academic resources:Other	1	0.7%
I have always loved UI and wanted my degree from here:Other	1	0.7%
Vandal Football:Other	1	0.7%
acceptance:Other	1	0.7%
Small Classes:Other	1	0.7%
It was my backup - I felt I could get in:Other	1	0.7%
Good scholarship offer:Other	1	0.7%
clinic programs and atmosphere:Other	1	0.7%
Clinical Offerings:Other	1	0.7%
friend was a 1L. Plus, I received an offer of a waiver on tuition and it was close to hime:Other	1	0.7%
Recreational Opportunities:Other	1	0.7%
Total Responses:	148	



**1. Why did you apply to the University of Idaho College of Law? (Check all that apply)**



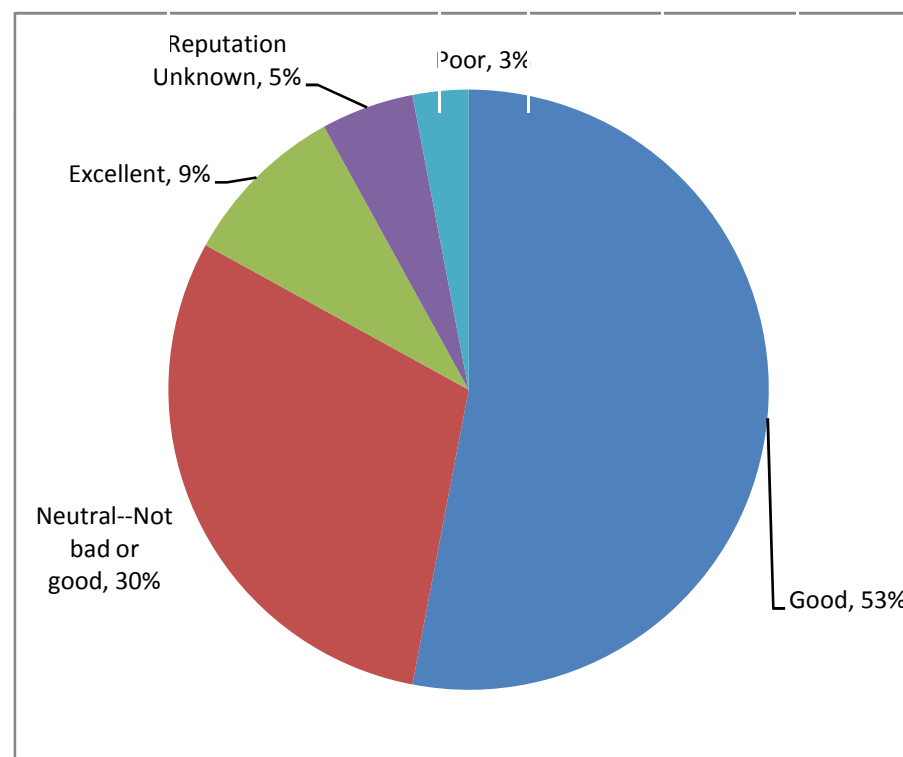


**2. Did you have any contact with the College of Law before you applied? If yes, please indicate how influential each was in your decision to attend Idaho.**

Item	Not Influential	Somewhat Influential	Very Influential	I did not have this type of contact before applying.	Total
Alumni	13.5%	17.6%	27.0%	41.9%	148
Class visit/tour	17.6%	8.8%	12.8%	60.8%	148
College recruiting fair	18.9%	8.8%	4.1%	68.2%	148
Phone/email question(s)	18.2%	14.9%	11.5%	55.4%	148
Special Event (e.g. Bellwood lectures, guest speakers)	18.2%	6.1%	4.1%	71.6%	148
Viewbook mailing	23.6%	18.9%	4.7%	52.7%	148
Total Responses:	148				

**3. How did you perceive the reputation of the College of Law before you applied. (Rating Scale)**

Value	Count	Percent
Good	79	53%
Neutral--Not bad or good	45	30%
Excellent	13	9%
I didn't know Idaho's reputation before I enrolled.	7	5%
Poor	4	3%
Total Responses:	148	



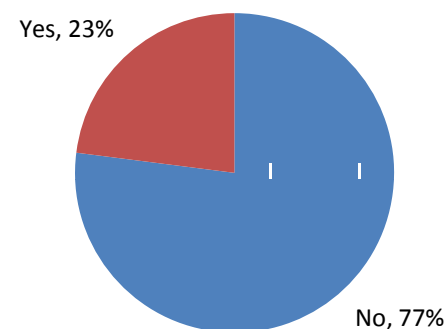


**4. Rank the following factors according to their importance to your decision to attend the College of Law.**

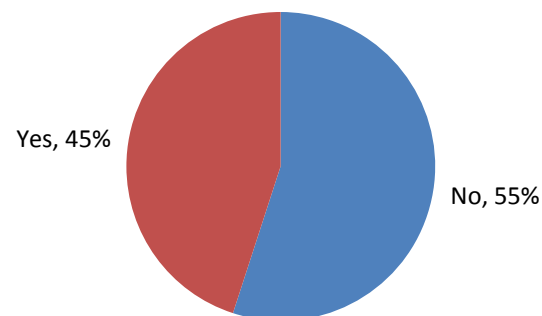
Value	1	2	3	4	5	6	7	AVG Rank
Value (tuition, fees, cost of living)	35	19	24	16	21	18	14	3.5
Location-home/family	22	19	25	30	19	14	18	3.8
Scholarship	26	21	21	21	20	17	21	3.8
Academic Quality	14	19	29	22	26	14	23	4.1
Location-Geographic region in which I want to practice	14	28	21	14	19	27	24	4.2
Location-Moscow/N. Idaho	14	23	18	24	21	22	25	4.2
Job Placement Rate	22	18	9	20	21	35	22	4.3
Total Responses:	147							

**5. Did you visit the University of Idaho, specifically to visit the law school or for any other reason, before making your decision to apply?**

Value	Count	Percent
No	114	77%
Yes	34	23%
Total Responses:	148	

**6. Did you visit the University of Idaho, specifically to visit the law school or for any other reason, AFTER applying but BEFORE making your decision to attend?**

Value	Count	Percent
No	82	55%
Yes	66	45%
Total Responses:	148	





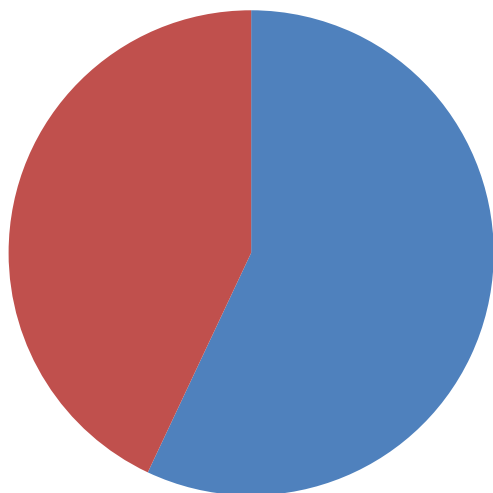
**7. Rank the following options in the order that you would have found most desirable as an applicant**

Value	1	2	3	AVG Rank
Boise, no Moscow	59	26	36	1.8
Moscow, w/ optional 3rd year in Boise.	36	50	35	2.0
Moscow, no Boise	26	45	50	2.2
Total Responses:	121			

**8. If the University of Idaho operated two otherwise identical law schools, one in Moscow and one in Boise, which would you prefer to attend?**

Value	Count	Percent
The University of Idaho College of Law in Boise	84	57%
The University of Idaho College of Law in Moscow	64	43%
Total Responses:	148	

The University of  
Idaho College of  
Law in  
Moscow, 43%



The University of  
Idaho College of  
Law in Boise, 57%



**9. Gender**

Value	Count	Percent
Male	84	57%
Female	64	43%
Total Responses:	148	

**10. Class**

Value	Count	Percent
First Year	64	43%
Third Year	47	32%
Second Year	37	25%
Total Responses:	148	

**11. Race/Ethnicity**

Value	Count	Percent
Caucasian	111	75%
Decline to Respond	13	9%
Asian/Pacific Islander	9	6%
Hispanic	9	6%
Other/Multi-racial	4	3%
Native American/Alaska Native	2	1%
Total Responses:	148	



## COMMUNICATIONS SUPPORTING UNIVERSITY OF IDAHO PROPOSAL FOR SECOND-YEAR LAW CURRICULUM IN BOISE

- **Letter from Chief Justice Roger Burdick on behalf of the Idaho Supreme Court**  
*Emphasizes collaboration between the Supreme Court and University of Idaho on Idaho Law Learning Center, and benefits of second-year law curriculum to students and faculty*
- **Letter from Sara Simmers, President, Student Bar Association**  
*Emphasizes benefits to students of second-year law curriculum in Boise*
- **Resolution of the College of Law Advisory Council**  
*Emphasizes second-year law curriculum in fulfilling University of Idaho's statewide mission in legal education*
- **Letter from Dean Pat Shannon, Boise State University College of Business & Economics**  
*Emphasizes cooperation between UI College of Law and BSU College of Business & Economics in concurrent degree programs, which will be aided and made more accessible by second-year law curriculum in Boise*
- **Letter from Pat McMurray et al., Boise Special Advisors Group, University of Idaho**  
*Emphasizes University of Idaho's statewide mission and need for expanded public legal education in Boise*
- **Letter from Randy Hill (Chairman of the Board) and Bill Connors (President and CEO), Boise Metro Chamber of Commerce**  
*Emphasizes benefits of legal education to workforce development and to economic development efforts*
- **Letter from Jeffrey L. Stoddard (Chairman of the Board), University of Idaho Foundation**  
*Emphasizes University's efforts to fulfill its statewide mission in legal education*



THE STATE OF IDAHO  
SUPREME COURT



ROGER S. BURDICK  
CHIEF JUSTICE

P.O. BOX 83720  
BOISE, IDAHO 83720-0101  
(208) 334-3464  
rburdick@idcourts.net

June 14, 2012

Dr. Mike Rush, Executive Director  
Idaho State Board of Education  
P.O. Box 83720  
Boise, ID 83720-0037

Dear Dr. Rush:

This letter is a statement of continued commitment by the Idaho Supreme Court and its Administrative Office to continue to develop the Idaho Law Learning Center in the Capital Annex. This is a continuation of a policy of the Idaho Supreme Court started under the leadership of Chief Justice Gerald Schroeder in January of 2007, continued by Chief Justice Eismann as evidenced by his July 1, 2009 letter (attached as an exhibit to this letter) and continued by the current members of the Idaho Supreme Court.

Pursuant to that long-standing policy, the Idaho Supreme Court is collaborating actively with the University Of Idaho College Of Law in conjunction with their delivery of a third-year law curriculum in Boise.

The Law Learning Center will be a uniquely efficient use of public resources----a historic building at a strategic location where legal education can be combined with continuing judicial education and law related civic education for the general public. This Court is committed to this continuing civic education and it is well within the mission of the state's judiciary.

As previously outlined, the Law Learning Center is planned to be the permanent home of the constitutionally mandated state law library – a library that serves the public as well as the legal profession and judiciary. The State Law Library is now operated by the University of Idaho in the Water Center Building under a memorandum of agreement with the Idaho Supreme Court. This memorandum agreement enables the University's library resources to be integrated with our existing personnel and assets of the State Law Library. The collection and services of both libraries are being enhanced through a cooperative effort. The Supreme Court is extremely pleased with improvements in the state law library already made possible by this collaboration, and the public benefits from the fiscal efficiencies created.



Dr. Mike Rush  
June 14, 2012  
Page 2

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Because the Supreme Court will continue to share occupancy costs of the Law Learning Center with the University of Idaho, as well as judicial and civic education activities, both private and public, it is important that the law library and the University of Idaho's law curriculum in Boise be developed in order to make full and efficient use of the Law Learning Center.

We believe that adding a second year curriculum at this time would build on the success of the third-year curriculum by providing additional opportunities for students and enabling more faculty to engage in scholarship and service, both of which advance the goals of the Supreme Court-University of Idaho collaboration. The third-year program has been a significant success to not only our institution but to other public institutions throughout the state as well as independent attorneys who have reached out to mentor and be involved with these third-year students. It is a natural progression to add the second-year curriculum and the Idaho Supreme Court strongly supports the same.

Very truly yours,



Roger S. Burdick  
Chief Justice  
Idaho Supreme Court

Attachment



[THIRD REVISED DRAFT -- ORIGINAL SIGNED BY THE CHIEF JUSTICE]

July 1, 2009

Mike Gwartney, Director, Idaho Department of Administration  
Tim Mason, Administrator, Division of Public Works  
650 W. State Street, Room 100  
Boise, ID 83720-0003

RE: Capitol Annex -- Future Idaho Law Learning Center

Gentlemen:

This letter confirms the commitment of the Idaho Supreme Court and Administrative Office of the Courts to develop -- in collaboration with the University of Idaho -- an Idaho Law Learning Center in the Capitol Annex (old Ada County Courthouse) on the Capitol Mall. The Supreme Court will seek public resources to fulfill this commitment.

The Law Learning Center is the first major public works project requested by the state judiciary since the Supreme Court Building was constructed more than four decades ago. The Law Learning Center will provide a distinctive opportunity to upgrade the State Law Library and to integrate its operation with the University of Idaho's law library. The Law Learning Center will provide a highly advantageous location for public legal education in the state capital as well as much-needed space for judicial education and administration, for activities involving other branches of state government, and for law-related education outreach to the general public. It will also enable the courts to enhance their outreach activities in cooperation with all of Idaho's public colleges and universities.

The Capitol Annex has a prominent place in Idaho legal and judicial history. The Law Learning Center will give it a vitally important mission in the 21<sup>st</sup> century.

Sincerely,

Daniel T. Eismann, Chief Justice  
Idaho Supreme Court

cc. Dr. M. Duane Nellis, President, University of Idaho  
Senator Denton Darrington, Chair, Idaho Permanent Building Fund Advisory Council  
Patti Tobias, Administrative Director of the Courts  
Don Burnett, Dean, University of Idaho College of Law



May 17, 2012

To the Idaho Board of Education:

As current students at the College of Law as well as President and Vice-President of the Student Bar Association, we write to provide our support for the proposal of an additional second-year curriculum at the Boise branch of the University of Idaho College of Law. We believe the addition of a second year curriculum in Boise would benefit both the State of Idaho and the University of Idaho by encouraging students to attend the University of Idaho.

The Student Bar Association since 2008 has supported a three-year law program in Boise, to complement the existing program in Moscow. The third-year program, which was approved by the Board of Regents in 2008, has proven to be a vast benefit to the student body. Currently the number of students who may attend their third year in Boise has been limited to 30 students per year due to physical space constraints as well as the difficulty of many students to move to Boise after two years in Moscow. Adding a second-year curriculum in Boise would greatly enhance opportunities for students and allow them to plan accordingly for a Boise experience during their time at the College of Law.

Moreover, the second-year curriculum would enable students who are interested in business law as well as "hands on" experience by way of externships to establish relationships with employers and placements in the Treasure Valley along with across southern Idaho. Externships are vital for students to develop proficiency in practicing law. Expanding the current Boise third-year program greatly increases the professional learning opportunities for students by having access to local businesses, non-profit organizations and governmental agencies.

Expanding to a second year as well as third year in Boise is crucial to making legal education more affordable for students whose parents or spouses need to be in the metropolitan area of Boise in order to find jobs to help finance the legal education. The goal of a full three-year program that would complement the established Moscow program is continues to be endorsed by students, and the second-year program is a reasonable and logical step toward that eventual goal.

For the benefits to the State of Idaho and University of Idaho College of Law, we ask you to support the second-year program in Boise proposal.

Kind Regards,

S/

Sara Simmers

University of Idaho College of Law

Student Bar Association President, 2012-2013

(Signing for myself and SBA Vice-President Will Gunderson)



**RESOLUTION BY UNIVERSITY OF IDAHO  
COLLEGE OF LAW ADVISORY COUNCIL**

April 27, 2012  
Moscow, Idaho

WHEREAS, the Law Advisory Council has played an active role in advising the law faculty, administration, and University leadership on strategic planning for fulfillment of the University's statewide mission in legal education; and

WHEREAS, in 2007 the Council unanimously recommended that the College of Law adopt a dual location model and that the University seek authority from the Board of Regents/State Board of Education to establish a branch JD program in Boise that would complement the program in Moscow; and

WHEREAS, in 2011, having received detailed reports on the success of the College's third-year curriculum in Boise and on progress in establishing the Idaho Law Learning Center in collaboration with the Idaho Supreme Court, the Council recommended that the College and University go forward again with a proposal for a three-year branch JD program in Boise; and

WHEREAS, in 2012, the Council, having reviewed the elements of a proposal to establish a second-year law curriculum in Boise as a step toward the eventual establishment of the three-year branch program, finds that such a proposal will enhance opportunities for students and strengthen the College's fulfillment of its statewide mission;

NOW, THEREFORE, BE IT RESOLVED BY THE COLLEGE OF LAW ADVISORY COUNCIL, that the College and the University be advised to go forward with the second-year step and three-year branch proposal, which the Council supports.

PASSED UNANIMOUSLY.

James C. Dale  
President

Tore Beal Gwartney  
President-Elect

Charles A. Homer  
Vice President Elect

Members of the Law Advisory Council:

See <http://www.uidaho.edu/law/aboutthecollegeoflaw/lawadvisorycouncil>





College of Business &amp; Economics

1910 University Drive Boise, Idaho 83725-1600

phone 208-426-1125  
fax 208-426-1135  
cobe.boisestate.edu

June 14, 2012

Mike Rush, Executive Director  
State Board of Education  
P.O. Box 83720  
Boise, ID 83720-0037

Dear Mike,

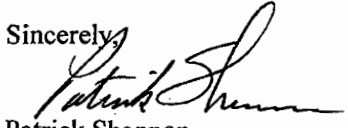
As you are no doubt aware, Dean Don Burnett of the University of Idaho (U of I), College of Law is coming before the State Board of Education (SBOE) in the very near future to request that his college be allowed to begin offering the second year of its law curriculum in Boise. My purpose in writing to you is to offer my support for Dean Burnett's request.

Previously, the SBOE approved a cooperative agreement between the U of I College of Law and the Boise State University College of Business and Economics, providing for delivery of concurrent Juris Doctor and Master of Science in Accountancy/Taxation degrees enabling students to receive both degrees through a coordinated program encompassing approximately three full years, including summers. This agreement does not create new degrees, but enhances the availability and cost-effectiveness of existing degrees while opening high-level career opportunities for students and adding to the expertise and human capital available to prospective employers. The colleges also have committed to future planning for delivery of concurrent Juris Doctor/Master of Business Administration degrees, providing powerful tools for career advancement while increasing business law expertise at leadership levels in Idaho's legal and business communities.

Should the SBOE approve the U of I request to offer the second year of the law program in Boise, the opportunities for students to participate in the concurrent law/taxation programs will be greatly enhanced. Both Dean Burnett and I expect the numbers of students participating in the concurrent programs to increase substantially if the second year law program can be offered in Boise. As explained above, this will mean more graduates from our respective programs with this important combination of talents to meet employment needs across the State of Idaho.

Thank you for your consideration and for that of the Board members. If I can provide any additional information, please do not hesitate to contact me.

Sincerely,

  
Patrick Shannon  
Dean

c: Dean Don Burnett





# University of Idaho

## Boise

June 5, 2012

Dr. Mike Rush, Executive Director  
State Board of Education  
P.O. Box 83720  
Boise, ID 83720-0037

**Re: University of Idaho College of Law Boise Proposal**

Dear Dr. Rush:

With enthusiasm the Boise Special Advisors Group supports the University of Idaho proposal to expand legal education in Boise. We strongly recommend approval by the Regents.

Since law students began their third year studies in Boise, the Special Advisors Group has taken particular interest in public legal education and has become familiar with its importance and its necessity in the state capital and population center of Idaho. We are impressed with the Law School and the faculty and students in Boise.

Now is the time for the College of Law, building on the success of its third-year program in Boise, to expand into a second-year program as the logical next step toward achieving the University's three-year program goal. The State Board wisely affirmed the statewide mission of the University of Idaho College of Law in 2008, instructing that the University go forward in collaboration with the Idaho Supreme Court to develop an Idaho Law Learning Center and authorizing the establishment of a third-year program in Boise. The success of the third year student cohort in each of these past two years is a testament to the need for public legal education in Boise and the caliber of the University faculty.

The Boise Special Advisors Group to the University of Idaho hereby expresses support for the College of Law proposal to the State Board of Education and continues to endorse the University's effort to fulfill its statewide mission in legal education.

Sincerely,

Pat McMurray, Chair

Boise Special Advisors, on Behalf of the Boise Special Advisors:

Linda Copple Trout, Annette Elg, Frances Ellsworth, Bill Gilbert, Alice Hennessey, Gary Mahn, Pat McMurray, Skip Oppenheimer, Ray Stark, Chis Taylor and Phil Reberger.

*Boise Special Advisors to the University of Idaho provide guidance and counsel that advances the University's education and outreach mission in the Boise Valley and southern Idaho. In this role, we advocate and support the University's leadership role as a statewide institution and advocate for select University initiatives and special interests in the region.*





## Boise Metro Chamber of Commerce

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Small Business Success Division  
Boise Valley Economic Partnership  
Boise Young Professionals  
Leadership Boise

June 8, 2012

Dr. Mike Rush, Executive Director  
Idaho State Board of Education  
P.O. Box 83720  
Boise, ID 83720-0037

Dear Dr. Rush:

The Boise Metro Chamber of Commerce supports the University of Idaho's proposal for additional legal education in Idaho. The University of Idaho is seeking approval by the Board of Regents to include a second-year program in Boise as a step toward achieving a full three-year program here.

The Chamber's Boise Valley Economic Partnership (BVEP) is the metro area's leading advocate for economic development, working to recruit and retain businesses and jobs. Our region's future economy depends on professional training programs and other workforce development opportunities. Expansion of legal education plays an important role in supporting economic development efforts.

We understand the University of Idaho's College of Law is building on the success of its third-year program in Boise by seeking Board of Regents approval of the second-year program as a step toward achieving a full three-year program in Boise.

Thank you very much for considering the Boise Metro Chamber's support for additional legal education in Boise by the University of Idaho.

Sincerely,

Randy Hill  
Chairman of the Board  
Boise Metro Chamber

Bill Connors  
President & CEO  
Boise Metro Chamber



# University of Idaho Foundation, Inc.

714 W. State Street, Suite 240  
Boise, ID 83702  
Phone: 208-364-4065

PO Box 443143  
Moscow, ID 83844-3143  
Phone: 208-885-4000

May 10, 2012

Mr. Mike Rush  
Executive Director  
State Board of Education  
P.O. Box 83720  
Boise, ID 83720-0037

Dear Mr. Rush:

By direction of the Board of Regents (State Board of Education), the University of Idaho is charged with the exclusive statewide mission in public legal education.

In 2008, the University of Idaho Foundation, Inc., adopted a statement of support for the University's plan to extend its program of legal education to the state capital with a three-year branch J.D. degree program that would complement the program in Moscow. In that year, the State Board affirmed the statewide mission, instructed the University to go forward in collaboration with the Idaho Supreme Court to develop an Idaho Law Learning Center, authorized the establishment of a third-year program in Boise, and instructed the University to return to the Board with a reworked proposal for the full three-year program.

The College of Law, building on the success of its third-year program in Boise, is now developing the reworked proposal, which includes a second-year program as a step toward achieving the three-year program goal.

The Board of Directors of the University of Idaho Foundation, Inc., hereby expresses support for such a proposal (to the State Board of Education) and continues to endorse the University's effort to fulfill its statewide mission in legal education.

Sincerely,



Jeffry L. Stoddard  
Chairman  
University of Idaho Foundation, Inc.

*Inspiring Futures*

*Invest in the University of Idaho*



**BOISE STATE UNIVERSITY**

**SUBJECT**

IDoTeach Program

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section III.G. 4 and 5

**BACKGROUND/DISCUSSION**

Boise State University (BSU) proposes to discontinue five free-standing science and mathematics secondary education degrees and replace them with five new emphases within existing science and math degrees to include a certificate program.

These proposed changes represent a significant revision to the teaching of science and mathematics secondary education at BSU, creating a set of programs, known together as the “IDoTeach Program” that replicates the UTeach teacher preparation program from the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years. The IDoTeach program will utilize the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for their students.

The creation of the IDoTeach Program is important to the State of Idaho for two primary reasons. First, a substantial shortage exists of college graduates in Science Technology Engineering Mathematics (STEM) Education areas, and without those graduates it is difficult for the state to expand industry in STEM fields. One way to address the problem is to enhance the “pipeline” of students entering college who are interested in and prepared for STEM fields. To accomplish the enhancement of the “pipeline” requires that we produce more STEM secondary education teachers and that those teachers are better qualified.

Second, the State Board of Education has increased graduation requirements in math and science. Whereas previously high school students could graduate with two years of math and two years of science, they are now required to graduate with three years of math and three years of science. Increasing the number of required courses will require additional STEM teachers. Results of a survey BSU conducted indicate a projected need of about 430 science and 520 math teachers in the next five years because of increased graduation requirements in math and science, increased enrollment, attrition of teachers, and increased demand due to greater career and societal emphasis on STEM.



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS**  
**OCTOBER 18, 2012**

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The freestanding programs to be discontinued include the BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education.

The new emphases to be created include the BS in Biology, emphasis in STEM secondary education, BS in Chemistry, emphasis in STEM secondary education; BS in Geology, emphasis in STEM secondary education; BS in Mathematics, emphasis in STEM secondary education, and BS in Physics, emphasis in STEM secondary education. All five programs will be offered by the College of Arts and Sciences.

The new certificate to be created will be an Undergraduate Certificate in IDo-Teach STEM Teaching Certification. This certificate will be offered by the College of Education.

**IMPACT**

The proposed changes will dramatically increase BSU's production of STEM Secondary Education teachers – BSU projects a quadrupling of the number of graduates – and they will substantially increase the effectiveness of the teachers that graduate from BSU's programs by integrating education curriculum with subject matter and by making use of the latest educational methodologies.

Projections of resource needs in the budget were calculated for the entire set of new programs. However, because it is the education curriculum that will require resources and because the entire education curriculum is contained within the Undergraduate Certificate program, BSU placed resource needs for the entire set of programs into the undergraduate certificate proposal. The budgets for the emphasis programs will reflect no resource needs because there will be no change in the subject area courses taught in each of the emphasis programs.

The budget includes a fourth year to reflect when the program will reach full capacity and full expense. The budget represents personnel costs to include one new faculty line at \$60,000 that begins in Year 2 and a second that begins in Year 4. The budget also includes stipends for master teachers at \$25,000 for each (four in Year 1, six in Year 2, eight in Year 3, ten in Year 4). Support staff will include a part-time programmer, full-time administrative assistant, part-time business/office manager, and work-study students. There will be other miscellaneous costs in Year 3 for Apprentice Teacher Support, Faculty Release, Master Teacher Professional Development; Peer Network Activities; Support Technology, and U-Teach Institute Support.

BSU will invest an annual \$100,000 for the UTeach Institute over five years to support a set of deliverables each year to include the release of curriculum and support materials, license to use during the planning and implementation period, for technical support, and for evaluation. BSU has entered into a licensing and



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS**  
**OCTOBER 18, 2012**

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cooperative agreement with the University of Texas. Once the deliverables for each of the five years has been completed, BSU will have fulfilled the terms of the agreement and own the curriculum.

**ATTACHMENTS**

Attachment 1 - Certificate in IDo-Teach STEM Teacher Certification	Page 5
Attachment 2 - BS in Biology, Emphasis in STEM Secondary Education	Page 29
Attachment 3 - BS in Chemistry, Emphasis in STEM Secondary Education	Page 45
Attachment 4 - BS in Geosciences, Emphasis in STEM Secondary Education	Page 61
Attachment 5 - BS in Mathematics, Emphasis in STEM Secondary Education	Page 77
Attachment 6 - BS in Physics, Emphasis in STEM Secondary Education	Page 93
Attachment 7 - Discontinue, BS in Biology, Secondary Education	Page 109
Attachment 8 - Discontinue, BS in Chemistry, Secondary Education	Page 117
Attachment 9 - Discontinue, BS in Earth Science, Secondary Education	Page 125
Attachment 10 - Discontinue, BS in Mathematics, Secondary Education	Page 133
Attachment 11 - Discontinue, BS in Physics, Secondary Education	Page 141
Attachment 12 – Uteach Institute Support - Implementation	Page 149

**STAFF COMMENTS AND RECOMMENDATIONS**

Boise State University (BSU) proposes to significantly change their math and science teacher education programs by adopting the UTeach Teacher Preparation Program from the University of Texas, which will be known as the IDoTeach Program. This change represents the creation of an entirely new structure of STEM education courses and a set of new programs.

BSU will offer the existing and new programs in parallel for several years to accommodate students in the pipeline. Many of the courses presently taught in the STEM secondary education programs are not STEM specific and are shared with other secondary education programs (e.g., English secondary ed). Therefore, those courses will continue to be taught.

BSU projects that the program will accommodate 32 new students the first year of the program, 64 new students in the second year, 96 in the third, and 128 in the fourth year and thereafter. Enrollment and graduate projections from the IDoTeach program includes all students enrolled in science and math secondary education programs and the certificate program.



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS**  
**OCTOBER 18, 2012**

Pursuant to III.Z, no institution has the Statewide Program Responsibility for Teacher Education or specific to STEM disciplinary areas. The following represents Secondary Education programs currently being offered.

Institution	Region	Branch Campus	Location	Program	Degree
LCSC	2	LCSC Campus	Lewiston	Biology, Secondary Education	BA, BS
LCSC	2	LCSC Campus	Lewiston	Chemistry, Secondary Education	BA, BS
LCSC	2	LCSC Campus	Lewiston	Earth Science, Secondary Ed	BA, BS
LCSC	2	LCSC Campus	Lewiston	Mathematics, Secondary Ed	BA, BS
LCSC	2	LCSC Campus	Lewiston	Natural Sciences, Secondary Ed	BA, BS
UI	2	UI Campus	Moscow	Secondary Education	BS Ed
UI	2	UI Campus	Moscow	*Biology	BS
UI	2	UI Campus	Moscow	*Chemistry	BS
UI	2	UI Campus	Moscow	*Mathematics	BS
UI	2	UI Campus	Moscow	*Physics	BS
UI	2	UI Campus	Moscow	*Geological Sciences	BS
BSU	3	BSU Campus	Boise	Biology, Secondary Education	BS
BSU	3	BSU Campus	Boise	Chemistry, Secondary Education	BS
BSU	3	BSU Campus	Boise	Earth Science Education	BS
BSU	3	BSU Campus	Boise	Mathematics, Secondary Education	BA, BS
BSU	3	BSU Campus	Boise	Physics, Secondary Education	BS
CWI	3	Caldwell, Nampa	Caldwell, Nampa	Education, Secondary	AA
CSI	4	CSI Campus	Twin Falls	Education, Secondary	AA
ISU	4	CSI Campus	Twin Falls	Secondary Education	BA, BS
ISU	4	CSI Campus	Twin Falls	Secondary Education	BA, BS
ISU	5	ISU Campus	Pocatello	Secondary Education	BS, BA
ISU	5	ISU Campus	Pocatello	Secondary Education	BS, BA
ISU	5	ISU Campus	Pocatello	Biology	BA, BS
ISU	5	ISU Campus	Pocatello	Chemistry	AS, BA, BS
ISU	5	ISU Campus	Pocatello	Geology	AS, BA, BS
ISU	5	ISU Campus	Pocatello	Mathematics	AS, BS
ISU	5	ISU Campus	Pocatello	Physics	AS, BA, BS
ISU	5	ISU Campus	Pocatello	Earth & Environmental Systems	BS, BA
ISU	6	University Place	Idaho Falls	Secondary Education	BS, BA
ISU	6	University Place	Idaho Falls	Secondary Education	BS, BA

\*(Students take a major in a STEM department and complete a degree in secondary education.)

The Professional Standards Commission has reviewed BSU's IDoTeach Program consistent with their policies and procedures and is forwarding their recommendation for Board approval under a separate agenda item.

BSU's request to offer the new undergraduate certificate in IDo-Teach STEM Teaching Certification and emphases in STEM secondary education is consistent with their Five-Year Plan for Delivery of Academic Programs in the Southwest Region. Board staff and Council on Academic Affairs Programs (CAAP) recommend approval as presented.

## BOARD ACTION

A motion to approve the request by Boise State University to implement the IDoTeach Program, discontinue five stand-alone Bachelor of Science majors, and create five new emphases and an undergraduate program as presented.

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



OFFICE OF THE IDAHO  
STATE BOARD OF EDUCATION  
AUG - 8 2012

RECEIVED

**Idaho State Board of Education****Proposal for Other Academic Program Activity and Professional-Technical Education**

Date of Proposal Submission:	July 15, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Education
Name of Department(s) or Area(s):	Dept of Curriculum, Instruction, & Foundational Studies

**Program Identification for Proposed New, Modified, or Discontinued Program:**

Title:	Undergraduate Certificate in IDoTeach STEM Teaching Certification	
Degree:	Undergraduate Certificate in IDoTeach STEM Teaching Certification	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.13 Science Secondary Education	
Proposed Starting Date:	Fall 2012 <i>Spring 2013 pg</i>	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> Statewide Responsibility

**Indicate whether this request is either of the following:**

<input checked="" type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :

*Alison Moots* *7/6/12*  
 College Dean (Institution) Date

Vice President for Research (as applicable) Date

Graduate Dean (as applicable) Date

State Administrator, SDPTE (as applicable) Date

*Steve Pearson* *7/20/12*  
 Chief Fiscal Officer (Institution) Date

*Patty Smiley* *9/18/12*  
 Academic Affairs Program Manager Date

*Melinda* *7/9/12*  
 Chief Academic Officer (Institution) Date

Chief Academic Officer, OSBE Date

*Robert A. Kuntz* *7/23/12*  
 President Date

SBOE/OSBE Approval Date

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**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes the creation of a new undergraduate certificate that will provide the educational coursework necessary for a student to receive state of Idaho certification to teach secondary science and math. Additionally, a student would need to gain subject area certification in biology, chemistry, geosciences, mathematics, and/or physics.

This proposed certification is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals 12-08 through 12-12). They will be replaced by (i) the certificate proposed in the present proposal (#12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of curricular changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

Our program, the "IDoTeach Program", will utilize the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for our students. Each course in the program has well established learning objectives, identified artifacts of evidence of meeting objectives, assessments, instructional emphasis, and core competencies.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*

1. Create a curriculum to develop secondary-level STEM educators who are better able to teach their subject matter because of the greater alignment of pedagogy and subject matter content during their college education.
2. Create a curriculum to develop secondary-level STEM educators who are more effective at teaching STEM subjects in general because they are using the latest methodologies of STEM education as captured in the UTeach program.
3. Recruit and retain teachers who are highly engaged and committed to improving the quality of secondary STEM education.

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- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

The following measures will ensure the high quality of the proposed program:

**Regional Institutional Accreditation:** Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

**Program Review:** Internal program evaluations will take place every five years as part of the normal departmental review process conducted by the Office of the Provost. This process requires a detailed self study (including outcome assessments) and a comprehensive review and site visit by external evaluators. Each of the involved STEM departments (Biological Sciences, Chemistry & Biochemistry, Geosciences, Mathematics, and Physics) will, as part of their normal program review process, have their secondary education programs reviewed.

**Specialized Accreditation:** The College of Education (COE) programs, including STEM secondary education programs, are accredited by the National Council for Accreditation of Teacher Education (NCATE) and the program in question will continue be reviewed by NCATE. The COE just completed an NCATE review in 2008-09 and as a result, a COE assessment committee has developed new procedures for ensuring the quality of programs within the COE, to include assessment and data reporting procedures.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*

NOTE: The curriculum for the IDoTeach program is being adopted and adapted from the UTeach teacher preparation program out of the University of Texas.

**IDoTeach Courses:**

**MSED 101 Step 1: Inquiry Approaches to Teaching – (1 credit)** Step 1 allows students to explore teaching as a career. Following an introduction to the theory and practice behind excellent inquiry-based science and mathematics instruction, students teach lessons in elementary classrooms to obtain firsthand experience in planning and implementation.

**MSED 102 Step 2: Inquiry-Based Lesson Design – (1 credit)** In Step 2, the second 1-credit exploratory course, students continue developing the lesson planning skills learned in Step 1 as they become familiar with exemplary middle school science curricula. After observing a lesson being taught in a local school district classroom, students work alone or in pairs to themselves plan and teach three inquiry-based lessons to sixth, seventh, or eighth graders.

**MSED 210 Knowing and Learning in Mathematics and Science – (3 credits)** Knowing and Learning in Mathematics and Science is the first in a sequence of three, 3-credit college of education courses in the IDoTeach program. It is followed by Classroom Interactions and Project-Based Instruction. Knowing and Learning is more than simply a general survey of theories in the STEM fields, its goal is for students to construct a model of knowing and learning that will guide

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their future classroom practice. The Knowing and Learning course fulfills a social science core requirement.

**MSED 310 Classroom Interactions – (3 credits)** Classroom Interactions is typically the fourth IDoTeach course taken by students and the second in a series of three, 3-credit College of Education courses. It follows Knowing and Learning and precedes Project-Based Instruction. Classroom Interactions builds on the Knowing and Learning course, moving from a focus on thinking and learning to a focus on teaching and learning. The course is centered around a close examination of the interplay between teachers, students, and content, and how these types of interactions enable students to develop deep conceptual understanding. Prospective teachers are also introduced to ways in which curriculum and technology are used in classroom settings to build interrelationships among teachers and students. They are taught how content and pedagogy combine to make effective teaching.

**MSED 410 Project-Based Instruction – (3 credits)** Project-Based Instruction (PBI) is the capstone course in the sequence of professional development courses (Knowing and Learning, Classroom Interactions, and PBI) IDoTeach students take prior to Apprentice Teaching. PBI is the course in which a number of the major principles and themes of the IDoTeach program—integration of mathematics and science content; infusion of technology in representation, analysis, modeling, assessment and contextualization of content; immersion in intensive field-based experiences; and a focus on designing equitable learning environments—are synthesized as the students develop an intellectually challenging project-based instructional unit. When students complete PBI, they are fully prepared for Apprentice Teaching.

**GENSCI 3xx Research Methods – (3 credits)** Research Methods is a one-semester three-hour course in the required IDoTeach sequence. It is one of several content courses specially designed to meet the needs of future teachers (others include Perspectives on Science and Mathematics and Functions and Modeling). It also fulfills multiple degree requirements. Sections are limited to 30 students, who meet two hours per week for non-traditional, interactive lectures and two hours per week for lab. The course is cross-listed between Physics, Chemistry, and Biology.

**MSED 311 Perspectives on Science and Mathematics – (3 credits)** Perspectives on Science and Mathematics is a 3 credit upper-division history course designed to meet the unique needs of future teachers. It is one of the specially designed content courses in the IDoTeach sequence (others include Functions and Modeling and Research Methods) that fulfills multiple degree requirements. The Perspectives fulfills the requirement for a Disciplinary Lens course in Literature and Humanities.

**MATH 3xx Functions and Modeling – (3 credits)** Functions and Modeling is a mathematics course designed to address the unique needs of future teachers of mathematics. It is required of IDoTeach math majors and also counts toward their mathematics degree. In this course, students engage in explorations and lab activities designed to strengthen and expand their knowledge of the topics found in secondary mathematics. Students collect data and explore a variety of situations that can be modeled using linear, exponential, polynomial, and trigonometric functions. Activities are designed to have them take a second, deeper look at topics they should have been exposed to previously; illuminate the connections between secondary and college mathematics; illustrate good uses of technology in teaching; illuminate the connections between various areas of mathematics; and engage them in serious (i.e., non-routine) problem solving, problem-based learning, and applications of mathematics.



**MSED 480 Apprentice Teaching – (6 credits)** The purpose of Apprentice Teaching is to offer IDoTeach students a culminating experience that provides them with the tools needed for their first teaching jobs. In Apprentice Teaching, students are immersed in the expectations, processes, and rewards of teaching. When making placements, IDoTeach master teachers consider each apprentice teacher's characteristics and abilities as well as the cooperating teacher's teaching and mentoring styles. The hope is that the complementary strengths of the IDoTeach apprentice teacher and cooperating teacher will generate a synergism that benefits both people professionally.

**5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*

Credit hours required in major:	29
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	(included above)
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	<b>29</b>

**6. Identify similar programs offered within Idaho or in the region by other colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

Institution and Degree name	Level	Specializations within the discipline (to reflect a national perspective)	Specializations offered within the degree at the institution
<b>BSU</b>	Bachelor's	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b> B.S. Biology B.S. Chemistry B.S. Geology B.S. Mathematics B.S. Physics	Bachelor's		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science



<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science Sec Ed. Mathematics Sec Ed. Natural Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>NIC</b>			
<b>UI</b> BS in Biology BS in Chemistry BS in Geosciences BS in Math BS in Physics B.Ed. In Secondary Education	Bachelor's		(Students complete a degree program in a STEM department and also complete a separate degree program in secondary education.) Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

Every college and university in the state and in the region has an array of science secondary education programs.

- 7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

Our projected enrollments in and graduates from the IDoTeach program, which will include all students enrolled in science & math secondary education programs and in the certificate program, are shown below.

The assumptions used are as follows:

1. Program will accommodate 32 new students the first year of the program, 64 new students the second, 96 the third, and 128 the fourth and thereafter.
2. Recruiting efforts will ensure that all of those openings are filled.
3. Year to year retention is 80%.
4. By year four, 20% will have graduated, then an additional 15% by year five, and an additional 15% by year six.



		2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
<b>new students</b>											
	Projected number of new students entering IDoTeach program each year in Science & Math Secondary Ed programs and in the certificate program										
	Biology	6	12	18	24	24	24	24	24	24	24
	Chemistry	3	7	10	14	14	14	14	14	14	14
	Geosciences	2	3	5	7	7	7	7	7	7	7
	Mathematics	14	28	42	56	56	56	56	56	56	56
	Physics	2	4	6	9	9	9	9	9	9	9
	Certificate Only	5	10	14	19	19	19	19	19	19	19
	Totals:	32	64	96	128	128	128	128	128	128	128
<b>enrollments</b>											
	Without the IDoTeach Program: projected total enrollment of all existing science & math secondary ed programs (estimate based on historical data) were the IDoTeach program not to be created										
	Biology	33	33	33	33	33	33	33	33	33	33
	Chemistry	19	19	19	19	19	19	19	19	19	19
	Geosciences	9	9	9	9	9	9	9	9	9	9
	Mathematics	77	77	77	77	77	77	77	77	77	77
	Physics	12	12	12	12	12	12	12	12	12	12
	Certificate Only	0	0	0	0	0	0	0	0	0	0
	Totals:	150	150	150	150	150	150	150	150	150	150
	Projected Fall enrollment of students at all levels in the IDoTeach program										
	Biology	6	17	32	52	66	76	81	81	81	81
	Chemistry	3	9	18	30	38	43	46	46	46	46
	Geosciences	2	5	9	15	19	22	23	23	23	23
	Mathematics	14	39	75	123	157	179	190	190	190	190
	Physics	2	6	11	19	24	27	29	29	29	29
	Certificate Only	5	13	26	42	54	61	65	65	65	65
	Totals:	32	89	172	280	357	408	434	434	434	434
<b>source of enrollments in IDoTeach Program</b>											
	IDoTeach enrollment of students who switch from existing programs or would have been in existing programs.										
	Biology	3	6	14	19	23	28	28	28	28	28
	Chemistry	2	4	8	11	13	16	16	16	16	16
	Geosciences	1	2	4	5	7	8	8	8	8	8
	Mathematics	7	15	33	44	55	66	66	66	66	66
	Physics	1	2	5	7	8	10	10	10	10	10
	Certificate Only	2	5	11	15	19	23	23	23	23	23
	Totals:	16	35	75	100	125	150	150	150	150	150
	IDoTeach enrollment of students who would not have become Secondary teachers without the IDoTeach Program										
	Biology	3	10	18	34	43	48	53	53	53	53
	Chemistry	2	6	10	19	25	27	30	30	30	30
	Geosciences	1	3	5	10	12	14	15	15	15	15
	Mathematics	7	24	42	79	102	113	125	125	125	125
	Physics	1	4	6	12	15	17	19	19	19	19
	Certificate Only	2	8	15	27	35	39	43	43	43	43
	Totals:	16	54	97	181	233	258	284	284	284	284
<b>graduates</b>											
	Estimated number of IDoTeach graduates										
	Biology	0	0	0	0	1	3	6	9	12	12
	Chemistry	0	0	0	0	1	2	3	5	7	7
	Geosciences	0	0	0	0	0	1	2	3	3	3
	Mathematics	0	0	0	0	3	7	14	21	28	28
	Physics	0	0	0	0	0	1	2	3	4	4
	Certificate Only	0	0	0	0	1	2	5	7	10	10
	Totals:	0	0	0	0	6	16	32	48	64	64
	Projected # of grads per year from existing science & math secondary ed programs (estimate based on historical data)										
	Biology	3	3	3	3	2	1	0	0	0	0
	Chemistry	2	2	2	2	1	1	0	0	0	0
	Geosciences	1	1	1	1	1	0	0	0	0	0
	Mathematics	7	7	7	7	5	4	0	0	0	0
	Physics	1	1	1	1	1	1	0	0	0	0
	Certificate Only	2	2	2	2	2	1	0	0	0	0
	Totals:	16	16	16	16	12	8	0	0	0	0
	Total number of Science/Math Secondary Education graduates										
	Biology	3	3	3	3	3	4	6	9	12	12
	Chemistry	2	2	2	2	2	3	3	5	7	7
	Geosciences	1	1	1	1	1	1	2	3	3	3
	Mathematics	7	7	7	7	8	11	14	21	28	28
	Physics	1	1	1	1	1	2	2	3	4	4
	Certificate Only	2	2	2	2	3	4	5	7	10	10
	Totals:	16	16	16	16	18	24	32	48	64	64

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Note that we estimate the program will approximately quadruple the total number of science and mathematics education graduates. We also estimate that the enrolled number of students in science secondary education programs will approximately quadruple the existing number and that the number of math secondary education majors will approximately double. We also expect the retention and graduation rates of IDoTeach students to be higher than present rates in existing science & math secondary education students.

- 8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

Please see above for estimates of graduates and enrollments.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
BSU Existing programs: BS in the following: Biology Secondary Ed Chemistry Secondary Ed Geosciences Secondary Ed Mathematics Secondary Ed Physics Secondary Ed	30 8 15 80 6	38 9 19 86 2	36 5 28 87 2	4 0 1 18 0	2 0 1 6 0	1 0 1 15 0	Approx # of grads per year: ~3 ~0 ~1 ~14 ~0
CSI							
CWI							
EITC							
ISU Biology Secondary Ed Chemistry Secondary Ed Geology Secondary Ed Math Secondary Ed Physics Secondary Ed	20 1 5 31 3	28 2 3 37 3	NA NA NA NA NA	NA NA NA NA NA	1 0 0 2 0	0 0 1 1 0	



LCSC BA/BS in the following:							Approx # of grads per year:
Secondary Ed Biology	13	6	0	0	0	0	~0
Secondary Ed Chemistry	1	4	1	0	0	0	~0
Secondary Ed Earth Science	3	0	1	0	0	0	~0
Secondary Ed Math	12	18	21	1	5	1	~2
Secondary Ed Natural Science	7	10	11	0	0	0	~0
NIC							
U of I							Approx # of grads per year:
Biology, B.S. Ed.	23	22	12	5	3	5	4
Chemistry, B.S. Ed.	5	6	5	3	1	0	1
Geological Science, B.S. Ed.	2	1	1	1	0	0	0
Math, B.S. Ed.	49	47	44	9	6	7	7
Physics, B.S. Ed.	3	2	4	0	1	1	1
Earth Science, B.S. Ed.	6	8	6	1	1	0	1

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

The new emphases and certificate will replace existing separate degrees and will therefore take on those students presently enrolled. Additionally, because the proposed program better integrates pedagogy into the content area, it will be more attractive to students, and we expect to see a substantial increase in the number of students pursuing STEM secondary education programs and in the number who graduate.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State	86 science 104 math	86 science 104 math	86 science 104 math	256 science 312 math
Nation				

- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

The State Department of Education has increased graduation requirements in math and science. Whereas previously a student could graduate with 2 years of math and 2 years of science, they will now be required to graduate with 3 years of math and 3 years in science. Increasing the number of required courses will require additional STEM teachers. Recently

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we conducted a needs assessment (current and 5 year projection) of the secondary math and science teacher needs for Idaho. Approximately 60% of Idaho's 300 secondary school principals responded to our invitation to participate. Our results indicated that there is a projected need for about 430 science and 520 math teachers in the next 5 years because of increases in graduation requirements in math and science, increased enrollment, attrition of teachers, and increased demand due to greater career and societal emphasis on STEM. Dividing the five year numbers by 5 yields the per-year numbers in the table above.

We are not filling out the "region" and "nation" rows in the above table because the focus is on producing STEM teachers for the state.

In addition, we are not using state and national labor data because it does not have sufficient granularity to be of value in this analysis, especially given that we have excellent data on need from our survey.

Please see attachments for the survey instrument and the report that resulted from the survey.

- b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

In the State of Idaho there exists a substantial shortage of college graduates in the STEM areas, and without those graduates it is difficult for the state to expand industry in the STEM fields. One way to attack the problem is to enhance the "pipeline" of students entering college who are interested in and prepared for STEM fields. And to accomplish that enhancement of the "pipeline" requires that we produce more STEM secondary education teachers and that those teachers are better qualified.

- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

N/A

- 11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe.** *This question is not applicable to requests for discontinuance.*

Not applicable

- 12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission.** *This question is not applicable to requests for discontinuance.*

By creating a better set of programs for STEM secondary education, we will create more and better-prepared STEM educators. And more/better prepared STEM educators will provide more and better STEM education to our middle and high school students. Those outcomes will serve the following aspects of the SBOE strategic plan:

*GOAL 1: A WELL EDUCATED CITIZENRY*

*The educational system will provide opportunities for individual advancement.*

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*Objective A: Access - Set policy and advocate for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.*

*Objective B: Higher Level of Educational Attainment – Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system.*

*Objective D: Transition – Improve the ability of the educational system to meet educational needs and allow students to efficiently and effectively transition into the workforce.*

**GOAL 2: CRITICAL THINKING AND INNOVATION**

*The educational system will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of individuals who are entrepreneurial, broadminded, think critically, and are creative.*

*Objective B: Innovation and Creativity – Educate students who will contribute creative and innovative ideas to enhance society.*

*Objective C: Quality Instruction – Increase student performance through the recruitment and retention of a diverse and highly qualified workforce of teachers, faculty, and staff.*

- 13. Describe how this request fits with the institution's vision and/or strategic plan. This question is not applicable to requests for discontinuance.**

<b>Goals of Institution Strategic Mission Plan</b>	<b>Proposed Program Plans to Achieve the Goal</b>
Goal 1: Create a signature, high-quality educational experience for all students. Strategies: Invest in faculty development, innovative pedagogies, and an engaging environment for learning.	An innovative program that incorporates pedagogy with content
Goal 1: Create a signature, high-quality educational experience for all students. Strategy: Provide bountiful opportunities within and across disciplines for experiential learning.	Incorporates experiential learning
Goal 4: Align university programs and activities with community needs. Strategy: Include community impact in the creation and assessment of university programs and activities.	Will help meet need for STEM educators
Goal 4: Align university programs and activities with community needs. Strategy: Increase student recruitment, retention, and graduation in STEM disciplines.	Will help meet need for STEM educated students by better preparing them for college STEM programs.
Goal 4: Align university programs and activities with community needs. Strategy: Collaborate with external partners to increase Idaho students' readiness for and enrollment in higher education.	Involves substantial work in partnership with secondary schools

- 14. Is the proposed program in your institution's Five-Year plan? Indicate below. This question is not applicable to requests for discontinuance.**

Yes   x   No       

If not on your institution's Five-Year plan, provide a justification for adding the program.

- 15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally). For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?**

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We will recruit students to the program by introducing the program during general recruiting sessions and through advisors in the College of Arts & Sciences and the College of Engineering.

- 16. Program Resource Requirements.** Using the Excel spreadsheet provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note:** This proposal is part of a package of proposals that, together, create one certificate program and five new emphases within existing programs:

Undergraduate Certificate in STEM Teaching Certification  
 BS in Biology, emphasis in STEM secondary education  
 BS in Chemistry, emphasis in STEM secondary education  
 BS in Geology, emphasis in STEM secondary education  
 BS in Mathematics, emphasis in STEM secondary education  
 BS in Physics, emphasis in STEM secondary education.

All projections of resource needs have been calculated for the entire set of new programs. However, because it is the education curriculum that will require resources and because the entire education curriculum is contained within the Undergraduate Certificate program, we are placing the resource needs for the entire set of programs into this proposal. Because there will be no change in the subject area courses taught in each of the emphasis programs (and therefore no resource requirements), the budgets of those emphasis programs reflect no resource needs.



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

Impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).											
I. PLANNED STUDENT ENROLLMENT											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*		
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	
A. New enrollments	Please see table in Section 7 for enrollment projections										
B. Shifting enrollments	Please see table in Section 7 for enrollment projections										
II. REVENUE											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
1. Appropriated (Reallocati	\$247,420		\$500,500		\$644,500		\$788,500		\$2,180,920	\$0	
2. Appropriated (New)									\$0	\$0	
3. Federal									\$0	\$0	
4. Tuition									\$0	\$0	
5. Student Fees									\$0	\$0	
6. Other (Micron Foundation Grant)	\$100,000		\$50,000		\$0		\$0		\$150,000	\$0	
Total Revenue	\$347,420	\$0.00	\$550,500	\$0.00	\$644,500	\$0.00	\$788,500	\$0.00	\$2,330,920	\$0	
Ongoing is defined as ongoing operating budget for the program which will become part of the base.											
One-time is defined as one-time funding in a fiscal year and not part of the base.											
III. EXPENDITURES											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
A. Personnel Costs											
1. FTE	2.78		6.38		8.38		10.38		27.92	-	
2. Faculty	\$100,000		\$210,000		\$260,000		\$370,000		\$940,000	\$0	
3. Administrators	\$13,400		\$20,000		\$20,000		\$20,000		\$73,400	\$0	
4. Adjunct Faculty									\$0	\$0	
5. Instructional Assistants	\$0		\$0		\$25,000		\$25,000		\$50,000	\$0	
6. Research Personnel									\$0	\$0	
7. Support Personnel	\$30,000		\$65,000		\$65,000		\$65,000		\$225,000	\$0	
8. Fringe Benefits	\$43,020		\$88,500		\$111,000		\$144,000		\$386,520	\$0	
9. Other:									\$0	\$0	
Total FTE Personnel and Costs	\$186,420	\$0.00	\$383,500	\$0.00	\$481,000	\$0.00	\$624,000	\$0.00	\$1,674,920	\$0	



	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>										
1. Travel	\$10,000		\$10,000		\$10,000		\$10,000		\$40,000	\$0
2. Professional Services									\$0	\$0
3. Other Services									\$0	\$0
4. Communications	\$8,000		\$8,000		\$8,000		\$8,000		\$32,000	\$0
5. Utilities									\$0	\$0
6. Materials and Supplies	\$8,000		\$8,000		\$8,000		\$8,000		\$32,000	\$0
7. Rentals									\$0	\$0
8. Repairs & Maintenance									\$0	\$0
9. Materials & Goods for Manufacture & Resale									\$0	\$0
10. Miscellaneous	\$135,000		\$141,000		\$137,500		\$138,500		\$552,000	\$0
<b>Total Operating Expenditures</b>	<b>\$161,000</b>	<b>\$0.00</b>	<b>\$167,000</b>	<b>\$0.00</b>	<b>\$163,500</b>	<b>\$0.00</b>	<b>\$164,500</b>	<b>\$0.00</b>	<b>\$656,000</b>	<b>\$0</b>
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>										
1. Library Resources									\$0	\$0
2. Equipment									\$0	\$0
<b>Total Capital Outlay</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0</b>
<b>D. Capital Facilities Construction or Major Renovation</b>									\$0	\$0
<b>E. Indirect Costs (overhead)</b>									\$0	\$0
<b>TOTAL EXPENDITURES:</b>	<b>\$347,420</b>	<b>\$0.00</b>	<b>\$550,500</b>	<b>\$0.00</b>	<b>\$644,500</b>	<b>\$0.00</b>	<b>\$788,500</b>	<b>\$0.00</b>	<b>\$2,330,920</b>	<b>\$0</b>
<b>Net Income (Deficit)</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0</b>
<b>Budget Notes:</b>										
* A fourth year is included because it is not until the fourth year that the program reaches full capacity and full expense.										
III.A.2	Faculty includes:	One new new faculty line (@\$60k) that begins YR2 and a second that begins in YR4 and stipends for master teachers (@\$25k each): 4 in YR1, 6 in YR2, 8 in YR3, 10 in YR4								
III.A.7	Support person	Includes part time programmer, full time administrative asst, part time Business/office manager, and workstudy students.								
III.B.6	Materials/Suppl	Includes administrative supplies and instructional kits for Steps 1 and 2								
III.B.10	Misc includes:	The following expenses; dollar amounts are shown for YR3.								
	Apprentice Teacher Support	500								
	Faculty Release	15,000								
	Master Teacher Prof Dev	8,000								
	Peer Network Activities	3,000								
	Support Technology	11,000								
	U-Teach Institute Support	100,000								

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## Attachment A: Curriculum

Certificate in IDoTeach STEM Secondary Teaching		
	Subject and Number	Credits
Disciplinary Lens Courses	Literature and Humanities (DLL)	
	<i>MSED 311 Perspectives on Science and Mathematics (IDoTeach)</i>	3
	Social Sciences (DLS)	
	<i>MSED 210 Knowing and Learning (IDoTeach)</i>	3
	<i>ED-CIFS 201 Foundations of Education (IDoTeach)</i>	3
Additional Coursework	<i>MSED 101 STEP 1 (IDoTeach)</i>	1
	<i>MSED 102 STEP 2 (IDoTeach)</i>	1
	<i>MSED 310 Classroom Interactions (IDoTeach)</i>	3
	<i>MSED 410 Project-Based Instruction (IDoTeach)</i>	3
	<i>MSED 480 Apprentice Teaching (IDoTeach)</i>	6
	<i>GENSCI 3xx Research Methods (IDoTeach)</i>	3
	<i>MATH 3xx Functions and Modeling (IDoTeach)</i>	3
	<i>Total Credits</i>	29



## Idaho Secondary School Science and Mathematics Teacher Needs

Please answer each of the following questions based on your current knowledge of your school's needs.

- 1** How would you characterize the community setting where your school is located?

Rural

Suburban

Urban

Other, please specify

---

- 2** How would you classify your school (choose all that apply);

High School

Junior High School

Middle School

Other, please specify

---

- 3** Approximately how many teachers are employed at your school in the following areas?

Mathematics

---

Science

---

- 4** If your school is currently in need of teachers certified in the areas below, please provide us with the number of teachers that would be required to meet your school's needs.

Earth Science

---

Physical Science

---

Life Science

---

Physics

---

Chemistry

---

Biology

---

Mathematics

---

- 5** Please consider your school's projected needs over the next five years.



About how many teachers certified in the areas below do you predict would be required to meet your school's needs **five years from now**?

Earth Science

Physical Science

Life Science

Physics

Chemistry

Biology

Mathematics

**6** Do you currently have any **math** teachers teaching outside of area?

Yes

No

If "Yes," approximately how many and in what subjects?

**7** Do you currently have any **science** teachers teaching outside of area?

Yes

No

If "Yes," approximately how many and in what subjects?

**8** In the last 5 years, have you had to reduce **math** offerings due to lack of qualified teachers?

Yes

No

If yes, please estimate the number of classes reduced and in what subjects.

**9** In the last 5 years, have you had to reduce **science** offerings due to lack of qualified teachers?

Yes

No

If yes, please estimate the number of classes reduced and in what subjects.



- 10** Over the *next five years*, approximately how many math teachers do you expect to need to hire based on the following:

Replacement due to retirement .....

Replacement due to teacher leaving district .....

Growth .....

Other, please specify .....

- 11** Over the *next five years*, approximately how many science teachers do you expect to need to hire based on the following:

Replacement due to retirement .....

Replacement due to teacher leaving district .....

Growth .....

Other, please specify .....



Survey Page 1



## **Secondary School Needs for Math and Science Teachers**

Fall 2009

Prepared by Louis Nadelson, Ph.D., Kristine Barney, M.A., and Barbara Morgan, Sc.D.  
Boise State University

### **Background**

There is a general perception and agreement that a shortage of qualified k-12 math and science teachers exists (Augustine, 2005). Yet, accurate data that details the extent of the shortage and demand for math and science teachers is fragmented (Association of Public and Land-grant Universities [APLU], 2009). In response to the perceived shortage and the need for accurate data, Boise State University teamed with the Idaho State Department of Education to survey all secondary principals in Idaho regarding their current and anticipated openings for math and science teachers.

### **Method**

We identified the anticipated issues, variables of interest, and the data that might be most useful. Our intent was to balance the need for detailed data of interest while maintaining brevity. We formulated questions and had several educators and researchers review our product. Modifications were made based on feedback, and our final product contained 11 questions that assessed school size, district location (urban, suburban, rural), school structure (middle school high school, 6-12, etc), current math and science teacher needs, numbers of math and science teachers currently working outside of their endorsements, and anticipated math and science teacher needs in the next 5 years.

Data collection took place on-line using the Zoomerang survey website interface. A request to participate was e-mailed to all the secondary school principals in Idaho using the mailing list of Idaho Secondary School Principals provided on the Idaho State Department of Education website ([http://www.sde.idaho.gov/site/mailling\\_list/index.htm](http://www.sde.idaho.gov/site/mailling_list/index.htm)). An e-mail cover letter sent from Superintendent Luna's office on Oct 15<sup>th</sup>, 2009 informed the principals of the survey purpose, invited them to participate, and included a link to the Zoomerang based survey. One week later we sent a second request for participation. We closed the survey after two weeks on October 30, 2009.

### **Results**

#### **Demographics:**

Approximately 60% of Idaho's 300 secondary school principals responded to our invitation to participate. In each of the following data tables we present our respondent's data and the predicted distributions extrapolated from the data to represent 100% of Idaho's secondary schools.



Table 1.

## The Distribution of Secondary School Community Settings

Community Setting	Measured	Extrapolated
Rural	119	204
Suburban	40	69
Urban	13	22
Virtual	3	5
Total	175	300

This indicates that the majority of respondents were from rural communities.

Table 2.

## The Classifications of Secondary Schools

Classification	Measured	Extrapolated
High School	64	110
Junior High School	26	45
Middle School	47	81
6-12 School	21	36
K-12 School	9	15
Virtual/Alternative School	4	7
Charter School	4	7
Total	175	300

These data indicate that most of the respondents were from high schools.

Table 3.

## Total Number of Mathematics and Science Teachers for Idaho

Discipline	Measured	Extrapolated
Mathematics:	794	1361
Science:	695	1191

This is baseline data indicating the number of math and science teachers in Idaho.



Table 4.

## Current Math and Science Teacher Needs

Discipline	Measured	Extrapolated
Earth Science	7.75	13
Physical Science	16.25	28
Life Science	13	22
Physics	10.3	18
Chemistry	13.25	23
Biology	8.75	15
Total Science	69.3	119
Mathematics	58	99

These are the current needs for secondary science and mathematics teachers in Idaho. These values should be considered with the caveat that answers to this survey question varied widely. This variance likely indicates that those surveyed may have interpreted the question differently from the way we intended.

Table 5

## Math and Science Teacher Hires in the Next Five Years

Reason for Hiring	Math		Science	
	Measured	Extrapolated	Measured	Extrapolated
Replacement due to retirement	128.5	220	93.5	160
Replacement due to teacher leaving district	84.5	145	66.5	114
Growth	81.25	139	76	130
Other, please specify	20.5	35	15	26
<b>Total</b>	<b>314.75</b>	<b>540</b>	<b>251</b>	<b>430</b>

These values are most likely accurate, as the items left little to interpretation. These results suggest that Idaho will likely need approximately 540 mathematics teachers and 430 science teachers in the next five years.



### **Limitations**

Through our analysis it became apparent that some of our questions seemed to be interpreted in a manner different than we intended. For example, one item which asked “What are your current needs for science teachers?” appeared to be interpreted to mean “How many science teacher positions do you have in your school?” Due to the possible alternative interpretations of some items, we relied more heavily on survey questions which were less ambiguous to determine the five year projected needs. We believe the figures included in Table 5 are accurate estimates for future needs (in the next five years) of math and science teachers in Idaho.



Association of Public and Land-grant Universities (2009). *Science mathematics teacher preparation and the analytic framework*. Retrieved from: <http://teacherimperative.startlogic.com/smti-test/index.php/archives/743>

Augustine, N. R. (2005). *Rising above the gathering storm: Energizing and employing America for a brighter economic future*. Washington, DC: National Academy Press.



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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education


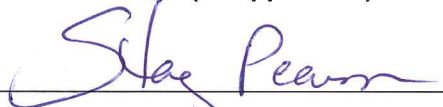

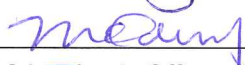


Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Biology

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Biology, emphasis in STEM Secondary Education	
Degree:	Bachelor of Science	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.1322 (biology 2 <sup>nd</sup> Ed)	
Proposed Starting Date:	<del>Fall 2012</del> Spring 2013 <sup>95</sup>	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> Statewide Responsibility

### Indicate whether this request is either of the following:

<input checked="" type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :

 College Dean (Institution)	7/6/12 Date	 Vice President for Research (as applicable)	Date
 Graduate Dean (as applicable)	Date	 State Administrator, SDPTE (as applicable)	Date
 Chief Fiscal Officer (Institution)	7/9/12 Date	 Academic Affairs Program Manager	7/13/12 Date
 Chief Academic Officer (Institution)	7/9/12 Date	 Chief Academic Officer, OSBE	7/13/12 Date
 President	7/23/12 Date	 SBOE/OSBE Approval	Date



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes a new “Bachelor of Science in Biology, emphasis in STEM Secondary Education” that will replace the existing, free-standing “Bachelor of Science in Biology, Secondary Education,” which is being discontinued via a separate proposal. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

The proposed emphasis is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of curricular changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

Our program, the “IDoTeach Program”, will utilize the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for our students. Each course in the program has well established learning objectives, identified artifacts of evidence of meeting objectives, assessments, instructional emphasis, and core competencies.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
1. Create a curriculum to develop secondary-level STEM educators who are better able to teach their subject matter because of the greater alignment of pedagogy and subject matter content during their college education.
  2. Create a curriculum to develop secondary-level STEM educators who are more effective at teaching STEM subjects in general because they are using the latest methodologies of STEM education as captured in the UTeach program.
  3. Recruit and retain teachers who are highly engaged and committed to improving the quality of secondary STEM education.

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- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

The following measures will ensure the high quality of the proposed program:

**Regional Institutional Accreditation:** Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

**Program Review:** Internal program evaluations will take place every five years as part of the normal departmental review process conducted by the Office of the Provost. This process requires a detailed self study (including outcome assessments) and a comprehensive review and site visit by external evaluators. Each of the involved STEM departments (Biological Sciences, Chemistry & Biochemistry, Geosciences, Mathematics, and Physics) will, as part of their normal program review process, have their secondary education programs reviewed.

**Specialized Accreditation:** The College of Education (COE) programs, including STEM secondary education programs, are accredited by the National Council for Accreditation of Teacher Education (NCATE) and the program in question will continue be reviewed by NCATE. The COE just completed an NCATE review in 2008-09 and as a result, a COE assessment committee has developed new procedures for ensuring the quality of programs within the COE, to include assessment and data reporting procedures.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*

NOTE: The curriculum for the IDoTeach program is being adopted and adapted from the UTeach teacher preparation program out of the University of Texas.

**IDoTeach Courses:**

**MSED 101 Step 1: Inquiry Approaches to Teaching – (1 credit)** Step 1 allows students to explore teaching as a career. Following an introduction to the theory and practice behind excellent inquiry-based science and mathematics instruction, students teach lessons in elementary classrooms to obtain firsthand experience in planning and implementation.

**MSED 102 Step 2: Inquiry-Based Lesson Design – (1 credit)** In Step 2, the second 1-credit exploratory course, students continue developing the lesson planning skills learned in Step 1 as they become familiar with exemplary middle school science curricula. After observing a lesson being taught in a local school district classroom, students work alone or in pairs to themselves plan and teach three inquiry-based lessons to sixth, seventh, or eighth graders.

**MSED 210 Knowing and Learning in Mathematics and Science – (3 credits)** Knowing and Learning in Mathematics and Science is the first in a sequence of three, 3-credit college of education courses in the IDoTeach program. It is followed by Classroom Interactions and Project-Based Instruction. Knowing and Learning is more than simply a general survey of theories in the STEM fields, its goal is for students to construct a model of knowing and learning that will guide their future classroom practice. The Knowing and Learning course fulfills a social science core requirement.



**MSED 310 Classroom Interactions – (3 credits)** Classroom Interactions is typically the fourth IDoTeach course taken by students and the second in a series of three, 3-credit College of Education courses. It follows Knowing and Learning and precedes Project-Based Instruction. Classroom Interactions builds on the Knowing and Learning course, moving from a focus on thinking and learning to a focus on teaching and learning. The course is centered around a close examination of the interplay between teachers, students, and content, and how these types of interactions enable students to develop deep conceptual understanding. Prospective teachers are also introduced to ways in which curriculum and technology are used in classroom settings to build interrelationships among teachers and students. They are taught how content and pedagogy combine to make effective teaching.

**MSED 410 Project-Based Instruction – (3 credits)** Project-Based Instruction (PBI) is the capstone course in the sequence of professional development courses (Knowing and Learning, Classroom Interactions, and PBI) IDoTeach students take prior to Apprentice Teaching. PBI is the course in which a number of the major principles and themes of the IDoTeach program—integration of mathematics and science content; infusion of technology in representation, analysis, modeling, assessment and contextualization of content; immersion in intensive field-based experiences; and a focus on designing equitable learning environments—are synthesized as the students develop an intellectually challenging project-based instructional unit. When students complete PBI, they are fully prepared for Apprentice Teaching.

**GENSCI 3xx Research Methods – (3 credits)** Research Methods is a one-semester three-hour course in the required IDoTeach sequence. It is one of several content courses specially designed to meet the needs of future teachers (others include Perspectives on Science and Mathematics and Functions and Modeling). It also fulfills multiple degree requirements. Sections are limited to 30 students, who meet two hours per week for non-traditional, interactive lectures and two hours per week for lab. The course is cross-listed between Physics, Chemistry, and Biology.

**MSED 311 Perspectives on Science and Mathematics – (3 credits)** Perspectives on Science and Mathematics is a 3 credit upper-division history course designed to meet the unique needs of future teachers. It is one of the specially designed content courses in the IDoTeach sequence (others include Functions and Modeling and Research Methods) that fulfills multiple degree requirements. The Perspectives fulfills the requirement for a Disciplinary Lens course in Literature and Humanities.

**MATH 3xx Functions and Modeling – (3 credits)** Functions and Modeling is a mathematics course designed to address the unique needs of future teachers of mathematics. It is required of IDoTeach math majors and also counts toward their mathematics degree. In this course, students engage in explorations and lab activities designed to strengthen and expand their knowledge of the topics found in secondary mathematics. Students collect data and explore a variety of situations that can be modeled using linear, exponential, polynomial, and trigonometric functions. Activities are designed to have them take a second, deeper look at topics they should have been exposed to previously; illuminate the connections between secondary and college mathematics; illustrate good uses of technology in teaching; illuminate the connections between various areas of mathematics; and engage them in serious (i.e., non-routine) problem solving, problem-based learning, and applications of mathematics.

**MSED 480 Apprentice Teaching – (6 credits)** The purpose of Apprentice Teaching is to offer IDoTeach students a culminating experience that provides them with the tools needed for their first teaching jobs. In Apprentice Teaching, students are immersed in the expectations,



processes, and rewards of teaching. When making placements, IDoTeach master teachers consider each apprentice teacher's characteristics and abilities as well as the cooperating teacher's teaching and mentoring styles. The hope is that the complementary strengths of the IDoTeach apprentice teacher and cooperating teacher will generate a synergism that benefits both people professionally.

**5. Please provide the program completion requirements and attach to this proposal as Appendix**

*A. This question is not applicable to requests for discontinuance.*

Credit hours required in major (inside and outside of major dept):	87
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	36
Credit hours in electives courses:	0
<b>Total credit hours required for completion:</b>	<b>123</b>

**6. Identify similar programs offered within Idaho or in the region by other**

**colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

<b>Institution and Degree name</b>	<b>Level</b>	<b>Specializations within the discipline (to reflect a national perspective)</b>	<b>Specializations offered within the degree at the institution</b>
<b>BSU</b>	Bachelor's	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b> B.S. Biology B.S. Chemistry B.S. Geology B.S. Mathematics B.S. Physics	Bachelor's		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

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<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science Sec Ed. Mathematics Sec Ed. Natural Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>NIC</b>			
<b>UI</b> BS in Biology BS in Chemistry BS in Geosciences BS in Math BS in Physics B.Ed. In Secondary Education	Bachelor's		(Students take a major in a STEM department and complete a degree in secondary education.) Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

Our projected enrollments in and graduates from the IDoTeach program, which will include all students enrolled in science & math secondary education programs and in the certificate program, are shown below.

The assumptions used are as follows:

1. The program will accommodate 32 new students the first year of the program, 64 new students the second, 96 the third, and 128 the fourth and thereafter.
2. Recruiting efforts will ensure that all of those openings are filled.
3. Year to year retention is 80%.
4. By year four, 20% will have graduated, then an additional 15% by year five, and an additional 15% by year six.
5. Enrollments and number of graduates will be divided among the five math/science subject areas in roughly the same percentages as present enrollments, but with a deliberate increase in the percentages chemistry and physics subject areas. The percents used were: Biology: 22%; Chemistry: 13%; Geosciences: 6%; Mathematics: 52%, and Physics: 8%.

The retention and graduation rates used in the above estimates are higher than our present university-wide rates. However, we are confident that the structure of IDoTeach program, including substantial interaction with master teachers, tutors, advisors, will result in retention and graduation rates that are even higher than the ambitious rates used above.

Note that we estimate the program will approximately quadruple the total number of science and mathematics education graduates. We also estimate that the enrolled number of students in science secondary education programs will approximately quadruple the existing number and that the number of math secondary education majors will

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approximately double.

8. **Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

See following tables.



		2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
<b>new students</b>											
	Projected number of new students entering IDoTeach program each year in Science & Math Secondary Ed programs and in the certificate program										
	Biology	6	12	18	24	24	24	24	24	24	24
	Chemistry	3	7	10	14	14	14	14	14	14	14
	Geosciences	2	3	5	7	7	7	7	7	7	7
	Mathematics	14	28	42	56	56	56	56	56	56	56
	Physics	2	4	6	9	9	9	9	9	9	9
	Certificate Only	5	10	14	19	19	19	19	19	19	19
	Totals:	32	64	96	128	128	128	128	128	128	128
<b>enrollments</b>											
	Without the IDoTeach Program: projected total enrollment of all existing science & math secondary ed programs (estimate based on historical data) were the IDoTeach program not to be created										
	Biology	33	33	33	33	33	33	33	33	33	33
	Chemistry	19	19	19	19	19	19	19	19	19	19
	Geosciences	9	9	9	9	9	9	9	9	9	9
	Mathematics	77	77	77	77	77	77	77	77	77	77
	Physics	12	12	12	12	12	12	12	12	12	12
	Certificate Only	0	0	0	0	0	0	0	0	0	0
	Totals:	150	150	150	150	150	150	150	150	150	150
	Projected Fall enrollment of students at all levels in the IDoTeach program										
	Biology	6	17	32	52	66	76	81	81	81	81
	Chemistry	3	9	18	30	38	43	46	46	46	46
	Geosciences	2	5	9	15	19	22	23	23	23	23
	Mathematics	14	39	75	123	157	179	190	190	190	190
	Physics	2	6	11	19	24	27	29	29	29	29
	Certificate Only	5	13	26	42	54	61	65	65	65	65
	Totals:	32	89	172	280	357	408	434	434	434	434
<b>source of enrollments in IDoTeach Program</b>											
	IDoTeach enrollment of students who switch from existing programs or would have been in existing programs.										
	Biology	3	6	14	19	23	28	28	28	28	28
	Chemistry	2	4	8	11	13	16	16	16	16	16
	Geosciences	1	2	4	5	7	8	8	8	8	8
	Mathematics	7	15	33	44	55	66	66	66	66	66
	Physics	1	2	5	7	8	10	10	10	10	10
	Certificate Only	2	5	11	15	19	23	23	23	23	23
	Totals:	16	35	75	100	125	150	150	150	150	150
	IDoTeach enrollment of students who would not have become Secondary teachers without the IDoTeach Program										
	Biology	3	10	18	34	43	48	53	53	53	53
	Chemistry	2	6	10	19	25	27	30	30	30	30
	Geosciences	1	3	5	10	12	14	15	15	15	15
	Mathematics	7	24	42	79	102	113	125	125	125	125
	Physics	1	4	6	12	15	17	19	19	19	19
	Certificate Only	2	8	15	27	35	39	43	43	43	43
	Totals:	16	54	97	181	233	258	284	284	284	284
<b>graduates</b>											
	Estimated number of IDoTeach graduates										
	Biology	0	0	0	0	1	3	6	9	12	12
	Chemistry	0	0	0	0	1	2	3	5	7	7
	Geosciences	0	0	0	0	0	1	2	3	3	3
	Mathematics	0	0	0	0	3	7	14	21	28	28
	Physics	0	0	0	0	0	1	2	3	4	4
	Certificate Only	0	0	0	0	1	2	5	7	10	10
	Totals:	0	0	0	0	6	16	32	48	64	64
	Projected # of grads per year from existing science & math secondary ed programs (estimate based on historical data)										
	Biology	3	3	3	3	2	1	0	0	0	0
	Chemistry	2	2	2	2	1	1	0	0	0	0
	Geosciences	1	1	1	1	1	0	0	0	0	0
	Mathematics	7	7	7	7	5	4	0	0	0	0
	Physics	1	1	1	1	1	1	0	0	0	0
	Certificate Only	2	2	2	2	2	1	0	0	0	0
	Totals:	16	16	16	16	12	8	0	0	0	0
	Total number of Science/Math Secondary Education graduates										
	Biology	3	3	3	3	3	4	6	9	12	12
	Chemistry	2	2	2	2	2	3	3	5	7	7
	Geosciences	1	1	1	1	1	1	2	3	3	3
	Mathematics	7	7	7	7	8	11	14	21	28	28
	Physics	1	1	1	1	1	2	2	3	4	4
	Certificate Only	2	2	2	2	3	4	5	7	10	10
	Totals:	16	16	16	16	18	24	32	48	64	64

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Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
<b>BSU</b> Existing programs: BS in the following: Biology Secondary Ed Chemistry Secondary Ed Geosciences Secondary Ed Mathematics Secondary Ed Physics Secondary Ed	30 8 15 80 6	38 9 19 86 2	36 5 28 87 2	4 0 1 18 0	2 0 1 6 0	1 0 1 15 0	Approx # of grads per year: ~3 ~0 ~1 ~14 ~0
<b>CSI</b>							
<b>CWI</b>							
<b>EITC</b>							
<b>ISU</b> Biology Secondary Ed Chemistry Secondary Ed Geology Secondary Ed Math Secondary Ed Physics Secondary Ed	20 1 5 31 3	28 2 3 37 3	NA NA NA NA NA	NA NA NA NA NA	1 0 0 2 0	0 0 1 1 0	
<b>LCSC</b> BA/BS in the following: Secondary Ed Biology Secondary Ed Chemistry Secondary Ed Earth Science Secondary Ed Math Secondary Ed Natural Science	13 1 3 12 7	6 4 0 18 10	0 1 1 21 11	0 0 0 1 0	0 0 0 5 0	0 0 0 1 0	Approx # of grads per year: ~0 ~0 ~0 ~2 ~0
<b>NIC</b>							
<b>U of I</b> Biology, B.S. Ed. Chemistry, B.S. Ed. Geological Science, B.S. Ed. Math, B.S. Ed. Physics, B.S. Ed. Earth Science, B.S. Ed.	23 5 2 49 3 6	22 6 1 47 2 8	12 5 1 44 4 6	5 3 1 9 0 1	3 1 0 6 1 1	5 0 0 7 1 0	Approx # of grads per year: 4 1 0 7 1 1

**9. Will this program reduce enrollments in other programs at your institution? If so, please explain.**

The new emphasis will replace an existing separate degree and will therefore take on those students presently enrolled. Additionally, because the proposed program better integrates pedagogy into the content area, it will be more attractive to students, and we expect to see a significant increase in the number of students pursuing STEM secondary education programs. However, because Boise State continues to see substantial increases in overall enrollments, it is unclear if any existing non-education programs will experience decreased enrollments.

**10. Provide verification of state workforce needs such as job titles requiring this degree.** Include State and National Department of Labor research on employment potential. *This question is not applicable to*

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requests for discontinuance.

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
<b>Region</b>				
<b>State</b>	86 science	86 science	86 science	256 science
	104 math	104 math	104 math	312 math
<b>Nation</b>				

- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

The State Department of Education has increased graduation requirements in math and science. Whereas previously a student could graduate with 2 years of math and 2 years of science, they will now be required to graduate with 3 years of math and 3 years in science. Increasing the number of required courses will require additional STEM teachers. Recently we conducted a needs assessment (current and 5 year projection) of the secondary math and science teacher needs for Idaho. Approximately 60% of Idaho's 300 secondary school principals responded to our invitation to participate. Our results indicated that there is a projected need for about 430 science and 520 math teachers in the next 5 years because of increases in graduation requirements in math and science, increased enrollment, attrition of teachers, and increased demand due to greater career and societal emphasis on STEM. Dividing the five year numbers by 5 yields the per-year numbers in the table above.

We are not filling out the "region" and "nation" rows in the above table because the focus is on producing STEM teachers for the state. The estimates above do not differentiate among the various science subject areas.

In addition, we are not using state and national labor data because it does not have sufficient granularity to be of value in this analysis, especially given that we have excellent data on need from our survey.

Please see attachments for the survey instrument and the report that resulted from the survey.

- b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

In the State of Idaho there exists a substantial shortage of college graduates in the STEM areas, and without those graduates it is difficult for the state to expand industry in the STEM fields. One way to attack the problem is to enhance the "pipeline" of students



entering college who are interested in and prepared for STEM fields. And to accomplish that enhancement of the “pipeline” requires that we produce more STEM secondary education teachers and that those teachers are better qualified.

- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

- 11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe.** *This question is not applicable to requests for discontinuance.*

Not planned at this time.

- 12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission.** *This question is not applicable to requests for discontinuance.*

By creating a better set of programs for STEM secondary education, we will create more and better-prepared STEM educators. And more/better prepared STEM educators will provide more and better STEM education to our middle and high school students. Those outcomes will serve the following aspects of the SBOE strategic plan:

**GOAL 1: A WELL EDUCATED CITIZENRY**

*The educational system will provide opportunities for individual advancement.*

*Objective A: Access - Set policy and advocate for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.*

*Objective B: Higher Level of Educational Attainment – Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system.*

*Objective D: Transition – Improve the ability of the educational system to meet educational needs and allow students to efficiently and effectively transition into the workforce.*

**GOAL 2: CRITICAL THINKING AND INNOVATION**

*The educational system will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of individuals who are entrepreneurial, broadminded, think critically, and are creative.*

*Objective B: Innovation and Creativity – Educate students who will contribute creative and innovative ideas to enhance society.*

*Objective C: Quality Instruction – Increase student performance through the recruitment and retention of a diverse and highly qualified workforce of teachers, faculty, and staff.*

- 13. Describe how this request fits with the institution's vision and/or strategic plan.** *This question is not applicable to requests for discontinuance.*

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Goals of Institution Strategic Mission Plan	Proposed Program Plans to Achieve the Goal
Goal 1: Create a signature, high-quality educational experience for all students. Strategies: Invest in faculty development, innovative pedagogies, and an engaging environment for learning.	An innovative program that incorporates pedagogy with content
Goal 1: Create a signature, high-quality educational experience for all students. Strategy: Provide bountiful opportunities within and across disciplines for experiential learning.	Incorporates experiential learning
Goal 4: Align university programs and activities with community needs. Strategy: Include community impact in the creation and assessment of university programs and activities.	Will help meet need for STEM educators
Goal 4: Align university programs and activities with community needs. Strategy: Increase student recruitment, retention, and graduation in STEM disciplines.	Will help meet need for STEM educated students by better preparing them for college STEM programs.
Goal 4: Align university programs and activities with community needs. Strategy: Collaborate with external partners to increase Idaho students' readiness for and enrollment in higher education.	Involves substantial work in partnership with secondary schools

**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes   x   No       

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

We will recruit students to the program by introducing the program during general recruiting sessions and through advisors in the College of Arts & Sciences and the College of Engineering.

**16. Program Resource Requirements.** Using the Excel spreadsheet provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, create one certificate**

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**program and five new emphases within existing programs:  
Undergraduate Certificate in STEM Teaching Certification  
BS in Biology, emphasis in STEM secondary education  
BS in Chemistry, emphasis in STEM secondary education  
BS in Geology, emphasis in STEM secondary education  
BS in Mathematics, emphasis in STEM secondary education  
BS in Physics, emphasis in STEM secondary education.**

**All projections of resource needs have been calculated for the entire set of new programs. However, because it is the education curriculum that will require resources and because the entire education curriculum is contained within the Undergraduate Certificate program, we are placing the resource needs for the entire set of programs into this proposal. Because there will be no change in the subject area courses taught in each of the emphasis programs (and therefore no resource requirements), the budgets of those emphasis programs reflect no resource needs. All resource needs have been consolidated in the proposal to create the Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13).**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**I. PLANNED STUDENT ENROLLMENT**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments	Please see Table 8 in Text for Estimates of Enrollments									
B. Shifting enrollments	Please see Table 8 in Text for Estimates of Graduates									

**II. REVENUE**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocati	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Revenue</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0</b>

Ongoing is defined as ongoing operating budget for the program which will become part of the base.

One-time is defined as one-time funding in a fiscal year and not part of the base.

**III. EXPENDITURES**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>A. Personnel Costs</b>										
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total FTE Personnel and Costs</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>March 15, 2012 \$0</b>	



	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>										
1. Travel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>										
1. Library Resources	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



## Appendix A: Proposed Degree Box

<b>Biology</b> <b>Bachelor of Science</b>		
	Course Number and Title	Credits
	<i>English Composition</i> ENGL 101 English Composition and either ENGL 102 or ENGL 112 English/Honors Composition <i>Communication in the Discipline (CID)</i> BIOL 323 Ecology (*indicates that course is satisfied by major requirements below)	3 3 *
	<i>UF 100 Intellectual Foundations</i> <i>UF 200 Civic and Ethical Foundations</i> <i>Finishing Foundations (capstone course in discipline)</i> Either BIOL 415 Microbial Physiology, BOT 401 Plant Physiology, ZOOL 401 Human Physiology, or ZOOL 409 Comparative Physiology (choose any course to meet general degree requirements or select course based on particular degree emphasis plan) (*indicates that course is satisfied by major requirements below)	3 3 *
<i>Disciplinary Lens Courses</i>	<i>Mathematics (DLM)</i> MATH 160 Survey of Calculus <b>OR</b> MATH 170 Calculus I* <i>Natural and Physical Sciences (DLN)</i> BIOL 191 General Biology I CHEM 111, 111L General Chemistry I with lab <i>Visual and Performing Arts (DLV)</i> <i>Literature and Humanities (DLL)</i> <i>Social Sciences (DLS)</i> Social Science (DLS) course in first field Social Science (DLS) course in second field *MATH 170 is recommended for students planning to enter graduate or professional school and those in the Microbiology or Molecular Cell Biology emphases.	4 4 4 3 3-4 3 3
Major Requirements	BIOL 192 General Biology II BIOL 301 Cell Biology BIOL 323 Ecology BIOL 343 Genetics Lecture BIOL 400 Organic Evolution BIOL 488 Senior Outcomes Assessment	4 3 4 3 3 0
	CHEM 112, 112L General Chemistry II with Lab CHEM 301, 302 Survey of Organic Chemistry with Lab <b>OR</b> CHEM 307, 308 and 309, 310 Organic Chemistry I & II with Labs CHEM 301-302 is suitable for most biology majors. Those interested in medical, dental, pharmacy, veterinary school and students pursuing the Microbiology or Molecular and Cell Biology emphases should take CHEM 307-310. Please consult your advisor.	4 5-10
	Two or more of these communication courses including at least one COMM course: COMM 101 Fundamentals of Speech Communication COMM 112 Reasoned Discourse COMM 231 Public Speaking COMM 356 Communication in the Small Group ENGL 201 Nonfiction Writing ENGL 202 Technical Communication (COMM 101, COMM 112, and ENGL 202 may be counted as fulfilling all or part of DLS requirements)	6
	MATH 143 and 144 College Algebra and Analytic Trigonometry <b>OR</b> MATH 147 Precalculus MATH 254 Applied Statistics with Computers	5 3



# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education


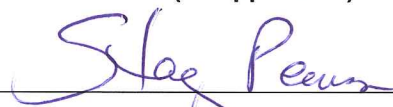
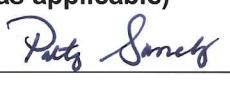
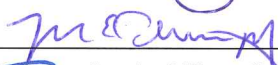


Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Chemistry

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Chemistry, emphasis in STEM Secondary Education	
Degree:	Bachelor of Science	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.1323 (Chemistry 2 <sup>nd</sup> Ed)	
Proposed Starting Date:	Fall 2012 Spring 2013 28	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> Statewide Responsibility

### Indicate whether this request is either of the following:

<input checked="" type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :

 College Dean (Institution)	7/6/12 Date	Vice President for Research (as applicable)	Date
Graduate Dean (as applicable)	Date	State Administrator, SDPTE (as applicable)	Date
 Chief Fiscal Officer (Institution)	7/9/12 Date	 Academic Affairs Program Manager	9/13/12 Date
 Chief Academic Officer (Institution)	7/9/12 Date	 Chief Academic Officer, OSBE	9/13/12 Date
 President	7/23/12 Date	SBOE/OSBE Approval	Date



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuation. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes a new "Bachelor of Science in Chemistry, emphasis in STEM Secondary Education" that will replace the existing, free-standing "Bachelor of Science in Chemistry, Secondary Education," which is being discontinued via a separate proposal. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

The proposed emphasis is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of curricular changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

Our program, the "IDoTeach Program", will utilize the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for our students. Each course in the program has well established learning objectives, identified artifacts of evidence of meeting objectives, assessments, instructional emphasis, and core competencies.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*

1. Create a curriculum to develop secondary-level STEM educators who are better able to teach their subject matter because of the greater alignment of pedagogy and subject matter content during their college education.
2. Create a curriculum to develop secondary-level STEM educators who are more effective at teaching STEM subjects in general because they are using the latest methodologies of STEM education as captured in the UTeach program.
3. Recruit and retain teachers who are highly engaged and committed to improving the quality of secondary STEM education.

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*Revised 9/5/12*



3. **Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

The following measures will ensure the high quality of the proposed program:

**Regional Institutional Accreditation:** Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

**Program Review:** Internal program evaluations will take place every five years as part of the normal departmental review process conducted by the Office of the Provost. This process requires a detailed self study (including outcome assessments) and a comprehensive review and site visit by external evaluators. Each of the involved STEM departments (Biological Sciences, Chemistry & Biochemistry, Geosciences, Mathematics, and Physics) will, as part of their normal program review process, have their secondary education programs reviewed.

**Specialized Accreditation:** The College of Education (COE) programs, including STEM secondary education programs, are accredited by the National Council for Accreditation of Teacher Education (NCATE) and the program in question will continue be reviewed by NCATE. The COE just completed an NCATE review in 2008-09 and as a result, a COE assessment committee has developed new procedures for ensuring the quality of programs within the COE, to include assessment and data reporting procedures.

4. **List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*

NOTE: The curriculum for the IDoTeach program is being adopted and adapted from the UTeach teacher preparation program out of the University of Texas.

**IDoTeach Courses:**

**MSED 101 Step 1: Inquiry Approaches to Teaching – (1 credit)** Step 1 allows students to explore teaching as a career. Following an introduction to the theory and practice behind excellent inquiry-based science and mathematics instruction, students teach lessons in elementary classrooms to obtain firsthand experience in planning and implementation.

**MSED 102 Step 2: Inquiry-Based Lesson Design – (1 credit)** In Step 2, the second 1-credit exploratory course, students continue developing the lesson planning skills learned in Step 1 as they become familiar with exemplary middle school science curricula. After observing a lesson being taught in a local school district classroom, students work alone or in pairs to themselves plan and teach three inquiry-based lessons to sixth, seventh, or eighth graders.

**MSED 210 Knowing and Learning in Mathematics and Science – (3 credits)** Knowing and Learning in Mathematics and Science is the first in a sequence of three, 3-credit college of education courses in the IDoTeach program. It is followed by Classroom Interactions and Project-Based Instruction. Knowing and Learning is more than simply a general survey of theories in the STEM fields, its goal is for students to construct a model of knowing and learning that will guide

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their future classroom practice. The Knowing and Learning course fulfills a social science core requirement.

**MSED 310 Classroom Interactions – (3 credits)** Classroom Interactions is typically the fourth IDoTeach course taken by students and the second in a series of three, 3-credit College of Education courses. It follows Knowing and Learning and precedes Project-Based Instruction. Classroom Interactions builds on the Knowing and Learning course, moving from a focus on thinking and learning to a focus on teaching and learning. The course is centered around a close examination of the interplay between teachers, students, and content, and how these types of interactions enable students to develop deep conceptual understanding. Prospective teachers are also introduced to ways in which curriculum and technology are used in classroom settings to build interrelationships among teachers and students. They are taught how content and pedagogy combine to make effective teaching.

**MSED 410 Project-Based Instruction – (3 credits)** Project-Based Instruction (PBI) is the capstone course in the sequence of professional development courses (Knowing and Learning, Classroom Interactions, and PBI) IDoTeach students take prior to Apprentice Teaching. PBI is the course in which a number of the major principles and themes of the IDoTeach program—integration of mathematics and science content; infusion of technology in representation, analysis, modeling, assessment and contextualization of content; immersion in intensive field-based experiences; and a focus on designing equitable learning environments—are synthesized as the students develop an intellectually challenging project-based instructional unit. When students complete PBI, they are fully prepared for Apprentice Teaching.

**GENSCI 3xx Research Methods – (3 credits)** Research Methods is a one-semester three-hour course in the required IDoTeach sequence. It is one of several content courses specially designed to meet the needs of future teachers (others include Perspectives on Science and Mathematics and Functions and Modeling). It also fulfills multiple degree requirements. Sections are limited to 30 students, who meet two hours per week for non-traditional, interactive lectures and two hours per week for lab. The course is cross-listed between Physics, Chemistry, and Biology.

**MSED 311 Perspectives on Science and Mathematics – (3 credits)** Perspectives on Science and Mathematics is a 3 credit upper-division history course designed to meet the unique needs of future teachers. It is one of the specially designed content courses in the IDoTeach sequence (others include Functions and Modeling and Research Methods) that fulfills multiple degree requirements. The Perspectives fulfills the requirement for a Disciplinary Lens course in Literature and Humanities.

**MATH 3xx Functions and Modeling – (3 credits)** Functions and Modeling is a mathematics course designed to address the unique needs of future teachers of mathematics. It is required of IDoTeach math majors and also counts toward their mathematics degree. In this course, students engage in explorations and lab activities designed to strengthen and expand their knowledge of the topics found in secondary mathematics. Students collect data and explore a variety of situations that can be modeled using linear, exponential, polynomial, and trigonometric functions. Activities are designed to have them take a second, deeper look at topics they should have been exposed to previously; illuminate the connections between secondary and college mathematics; illustrate good uses of technology in teaching; illuminate the connections between various areas of mathematics; and engage them in serious (i.e., non-routine) problem solving, problem-based learning, and applications of mathematics.

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MSED 480 Apprentice Teaching – (6 credits) The purpose of Apprentice Teaching is to offer IDoTeach students a culminating experience that provides them with the tools needed for their first teaching jobs. In Apprentice Teaching, students are immersed in the expectations, processes, and rewards of teaching. When making placements, IDoTeach master teachers consider each apprentice teacher's characteristics and abilities as well as the cooperating teacher's teaching and mentoring styles. The hope is that the complementary strengths of the IDoTeach apprentice teacher and cooperating teacher will generate a synergism that benefits both people professionally.

**5. Please provide the program completion requirements and attach to this proposal as Appendix**

**A.** *This question is not applicable to requests for discontinuance.*

Credit hours required in major (inside and outside of major dept):	79
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	38
Credit hours in electives courses:	3
<b>Total credit hours required for completion:</b>	<b>120</b>

**6. Identify similar programs offered within Idaho or in the region by other**

**colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

Institution and Degree name	Level	Specializations within the discipline (to reflect a national perspective)	Specializations offered within the degree at the institution
<b>BSU</b>	Bachelor's	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b> B.S. Biology B.S. Chemistry B.S. Geology B.S. Mathematics B.S. Physics	Bachelor's		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>LCSC</b> Sec Ed. Biology	BA or BS		Secondary Education: Biology Secondary Education: Chemistry

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<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science Sec Ed. Mathematics Sec Ed. Natural Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>NIC</b>			
<b>UI</b> BS in Biology BS in Chemistry BS in Geosciences BS in Math BS in Physics B.Ed. In Secondary Education	Bachelor's		(Students take a major in a STEM department and complete a degree in secondary education.) Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

- 7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

Our projected enrollments in and graduates from the IDoTeach program, which will include all students enrolled in science & math secondary education programs and in the certificate program, are shown below.

The assumptions used are as follows:

1. The program will accommodate 32 new students the first year of the program, 64 new students the second, 96 the third, and 128 the fourth and thereafter.
2. Recruiting efforts will ensure that all of those openings are filled.
3. Year to year retention is 80%.
4. By year four, 20% will have graduated, then an additional 15% by year five, and an additional 15% by year six.
5. Enrollments and number of graduates will be divided among the five math/science subject areas in roughly the same percentages as present enrollments, but with a deliberate increase in the percentages chemistry and physics subject areas. The percents used were: Biology: 22%; Chemistry: 13%; Geosciences: 6%; Mathematics: 52%, and Physics: 8%.

The retention and graduation rates used in the above estimates are higher than our present university-wide rates. However, we are confident that the structure of IDoTeach program, including substantial interaction with master teachers, tutors, advisors, will result in retention and graduation rates that are even higher than the ambitious rates used above.

Note that we estimate the program will approximately quadruple the total number of science and mathematics education graduates. We also estimate that the enrolled number of students in science secondary education programs will approximately quadruple the existing number and that the number of math secondary education majors will

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approximately double.

8. **Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

See following tables.



		2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
<b>new students</b>											
	Projected number of new students entering IDoTeach program each year in Science & Math Secondary Ed programs and in the certificate program										
	Biology	6	12	18	24	24	24	24	24	24	24
	Chemistry	3	7	10	14	14	14	14	14	14	14
	Geosciences	2	3	5	7	7	7	7	7	7	7
	Mathematics	14	28	42	56	56	56	56	56	56	56
	Physics	2	4	6	9	9	9	9	9	9	9
	Certificate Only	5	10	14	19	19	19	19	19	19	19
	Totals:	32	64	96	128	128	128	128	128	128	128
<b>enrollments</b>											
	Without the IDoTeach Program: projected total enrollment of all existing science & math secondary ed programs (estimate based on historical data) were the IDoTeach program not to be created										
	Biology	33	33	33	33	33	33	33	33	33	33
	Chemistry	19	19	19	19	19	19	19	19	19	19
	Geosciences	9	9	9	9	9	9	9	9	9	9
	Mathematics	77	77	77	77	77	77	77	77	77	77
	Physics	12	12	12	12	12	12	12	12	12	12
	Certificate Only	0	0	0	0	0	0	0	0	0	0
	Totals:	150	150	150	150	150	150	150	150	150	150
	Projected Fall enrollment of students at all levels in the IDoTeach program										
	Biology	6	17	32	52	66	76	81	81	81	81
	Chemistry	3	9	18	30	38	43	46	46	46	46
	Geosciences	2	5	9	15	19	22	23	23	23	23
	Mathematics	14	39	75	123	157	179	190	190	190	190
	Physics	2	6	11	19	24	27	29	29	29	29
	Certificate Only	5	13	26	42	54	61	65	65	65	65
	Totals:	32	89	172	280	357	408	434	434	434	434
<b>source of enrollments in IDoTeach Program</b>											
	IDoTeach enrollment of students who switch from existing programs or would have been in existing programs.										
	Biology	3	6	14	19	23	28	28	28	28	28
	Chemistry	2	4	8	11	13	16	16	16	16	16
	Geosciences	1	2	4	5	7	8	8	8	8	8
	Mathematics	7	15	33	44	55	66	66	66	66	66
	Physics	1	2	5	7	8	10	10	10	10	10
	Certificate Only	2	5	11	15	19	23	23	23	23	23
	Totals:	16	35	75	100	125	150	150	150	150	150
	IDoTeach enrollment of students who would not have become Secondary teachers without the IDoTeach Program										
	Biology	3	10	18	34	43	48	53	53	53	53
	Chemistry	2	6	10	19	25	27	30	30	30	30
	Geosciences	1	3	5	10	12	14	15	15	15	15
	Mathematics	7	24	42	79	102	113	125	125	125	125
	Physics	1	4	6	12	15	17	19	19	19	19
	Certificate Only	2	8	15	27	35	39	43	43	43	43
	Totals:	16	54	97	181	233	258	284	284	284	284
<b>graduates</b>											
	Estimated number of IDoTeach graduates										
	Biology	0	0	0	0	1	3	6	9	12	12
	Chemistry	0	0	0	0	1	2	3	5	7	7
	Geosciences	0	0	0	0	0	1	2	3	3	3
	Mathematics	0	0	0	0	3	7	14	21	28	28
	Physics	0	0	0	0	0	1	2	3	4	4
	Certificate Only	0	0	0	0	1	2	5	7	10	10
	Totals:	0	0	0	0	6	16	32	48	64	64
	Projected # of grads per year from existing science & math secondary ed programs (estimate based on historical data)										
	Biology	3	3	3	3	2	1	0	0	0	0
	Chemistry	2	2	2	2	1	1	0	0	0	0
	Geosciences	1	1	1	1	1	0	0	0	0	0
	Mathematics	7	7	7	7	5	4	0	0	0	0
	Physics	1	1	1	1	1	1	0	0	0	0
	Certificate Only	2	2	2	2	2	1	0	0	0	0
	Totals:	16	16	16	16	12	8	0	0	0	0
	Total number of Science/Math Secondary Education graduates										
	Biology	3	3	3	3	3	4	6	9	12	12
	Chemistry	2	2	2	2	2	3	3	5	7	7
	Geosciences	1	1	1	1	1	1	2	3	3	3
	Mathematics	7	7	7	7	8	11	14	21	28	28
	Physics	1	1	1	1	1	2	2	3	4	4
	Certificate Only	2	2	2	2	3	4	5	7	10	10
	Totals:	16	16	16	16	18	24	32	48	64	64

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Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
<b>BSU</b> Existing programs: BS in the following: Biology Secondary Ed Chemistry Secondary Ed Geosciences Secondary Ed Mathematics Secondary Ed Physics Secondary Ed	30 8 15 80 6	38 9 19 86 2	36 5 28 87 2	4 0 1 18 0	2 0 1 6 0	1 0 1 15 0	Approx # of grads per year: ~3 ~0 ~1 ~14 ~0
<b>CSI</b>							
<b>CWI</b>							
<b>EITC</b>							
<b>ISU</b> Biology Secondary Ed Chemistry Secondary Ed Geology Secondary Ed Math Secondary Ed Physics Secondary Ed	20 1 5 31 3	28 2 3 37 3	NA NA NA NA NA	NA NA NA NA NA	1 0 0 2 0	0 0 1 1 0	
<b>LCSC</b> BA/BS in the following: Secondary Ed Biology Secondary Ed Chemistry Secondary Ed Earth Science Secondary Ed Math Secondary Ed Natural Science	13 1 3 12 7	6 4 0 18 10	0 1 1 21 11	0 0 0 1 0	0 0 0 5 0	0 0 0 1 0	Approx # of grads per year: ~0 ~0 ~0 ~2 ~0
<b>NIC</b>							
<b>U of I</b> Biology, B.S. Ed. Chemistry, B.S. Ed. Geological Science, B.S. Ed. Math, B.S. Ed. Physics, B.S. Ed. Earth Science, B.S. Ed.	23 5 2 49 3 6	22 6 1 47 2 8	12 5 1 44 4 6	5 3 1 9 0 1	3 1 0 6 1 1	5 0 0 7 1 0	Approx # of grads per year: 4 1 0 7 1 1

**9. Will this program reduce enrollments in other programs at your institution? If so, please explain.**

The new emphasis will replace an existing separate degree and will therefore take on those students presently enrolled. Additionally, because the proposed program better integrates pedagogy into the content area, it will be more attractive to students, and we expect to see a significant increase in the number of students pursuing STEM secondary education programs. However, because Boise State continues to see substantial increases in overall enrollments, it is unclear if any existing non-education programs will experience decreased enrollments.

**10. Provide verification of state workforce needs such as job titles requiring this degree.** Include State and National Department of Labor research on employment potential. *This question is not applicable to*

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requests for discontinuance.

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
<b>Region</b>				
<b>State</b>	86 science	86 science	86 science	256 science
	104 math	104 math	104 math	312 math
<b>Nation</b>				

- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

The State Department of Education has increased graduation requirements in math and science. Whereas previously a student could graduate with 2 years of math and 2 years of science, they will now be required to graduate with 3 years of math and 3 years in science. Increasing the number of required courses will require additional STEM teachers. Recently we conducted a needs assessment (current and 5 year projection) of the secondary math and science teacher needs for Idaho. Approximately 60% of Idaho's 300 secondary school principals responded to our invitation to participate. Our results indicated that there is a projected need for about 430 science and 520 math teachers in the next 5 years because of increases in graduation requirements in math and science, increased enrollment, attrition of teachers, and increased demand due to greater career and societal emphasis on STEM. Dividing the five year numbers by 5 yields the per-year numbers in the table above.

We are not filling out the "region" and "nation" rows in the above table because the focus is on producing STEM teachers for the state. The estimates above do not differentiate among the various science subject areas.

In addition, we are not using state and national labor data because it does not have sufficient granularity to be of value in this analysis, especially given that we have excellent data on need from our survey.

Please see attachments for the survey instrument and the report that resulted from the survey.

- b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

In the State of Idaho there exists a substantial shortage of college graduates in the STEM areas, and without those graduates it is difficult for the state to expand industry in the STEM fields. One way to attack the problem is to enhance the "pipeline" of students



entering college who are interested in and prepared for STEM fields. And to accomplish that enhancement of the “pipeline” requires that we produce more STEM secondary education teachers and that those teachers are better qualified.

- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

- 11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe.** *This question is not applicable to requests for discontinuance.*

Not planned at this time.

- 12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission.** *This question is not applicable to requests for discontinuance.*

By creating a better set of programs for STEM secondary education, we will create more and better-prepared STEM educators. And more/better prepared STEM educators will provide more and better STEM education to our middle and high school students. Those outcomes will serve the following aspects of the SBOE strategic plan:

**GOAL 1: A WELL EDUCATED CITIZENRY**

*The educational system will provide opportunities for individual advancement.*

*Objective A: Access - Set policy and advocate for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.*

*Objective B: Higher Level of Educational Attainment – Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system.*

*Objective D: Transition – Improve the ability of the educational system to meet educational needs and allow students to efficiently and effectively transition into the workforce.*

**GOAL 2: CRITICAL THINKING AND INNOVATION**

*The educational system will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of individuals who are entrepreneurial, broadminded, think critically, and are creative.*

*Objective B: Innovation and Creativity – Educate students who will contribute creative and innovative ideas to enhance society.*

*Objective C: Quality Instruction – Increase student performance through the recruitment and retention of a diverse and highly qualified workforce of teachers, faculty, and staff.*

- 13. Describe how this request fits with the institution's vision and/or strategic plan.** *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission Plan	Proposed Program Plans to Achieve the Goal
Goal 1: Create a signature, high-quality educational experience for all students. Strategies: Invest in faculty development, innovative pedagogies, and an engaging environment for learning.	An innovative program that incorporates pedagogy with content

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Goal 1: Create a signature, high-quality educational experience for all students. Strategy: Provide bountiful opportunities within and across disciplines for experiential learning.	Incorporates experiential learning
Goal 4: Align university programs and activities with community needs. Strategy: Include community impact in the creation and assessment of university programs and activities.	Will help meet need for STEM educators
Goal 4: Align university programs and activities with community needs. Strategy: Increase student recruitment, retention, and graduation in STEM disciplines.	Will help meet need for STEM educated students by better preparing them for college STEM programs.
Goal 4: Align university programs and activities with community needs. Strategy: Collaborate with external partners to increase Idaho students' readiness for and enrollment in higher education.	Involves substantial work in partnership with secondary schools

**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes   x   No       

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

We will recruit students to the program by introducing the program during general recruiting sessions and through advisors in the College of Arts & Sciences and the College of Engineering.

**16. Program Resource Requirements.** Using the [Excel spreadsheet](#) provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, create one certificate program and five new emphases within existing programs:**  
**Undergraduate Certificate in STEM Teaching Certification**  
**BS in Biology, emphasis in STEM secondary education**  
**BS in Chemistry, emphasis in STEM secondary education**  
**BS in Geology, emphasis in STEM secondary education**



**BS in Mathematics, emphasis in STEM secondary education  
BS in Physics, emphasis in STEM secondary education.**

**All projections of resource needs have been calculated for the entire set of new programs. However, because it is the education curriculum that will require resources and because the entire education curriculum is contained within the Undergraduate Certificate program, we are placing the resource needs for the entire set of programs into this proposal. Because there will be no change in the subject area courses taught in each of the emphasis programs (and therefore no resource requirements), the budgets of those emphasis programs reflect no resource needs. All resource needs have been consolidated in the proposal to create the Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13).**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**I. PLANNED STUDENT ENROLLMENT**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments	Please see Table 8 in Text for Estimates of Enrollments									
B. Shifting enrollments	Please see Table 8 in Text for Estimates of Graduates									

**II. REVENUE**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocat	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0

Ongoing is defined as ongoing operating budget for the program which will become part of the base.

One-time is defined as one-time funding in a fiscal year and not part of the base.

**III. EXPENDITURES**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>A. Personnel Costs</b>										
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total FTE Personnel and Costs</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	March 15, 2012 \$0	



	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>										
1. Travel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>										
1. Library Resources	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



## Appendix A: Proposed Degree Box

Chemistry, STEM Secondary Education Bachelor of Science		
Content	Notes	Credits
Communication	<i>English Composition</i> ENGL 101 Introduction to College Writing ENGL 102 Intro to College Writing and Research CHEM 323 "Communication in CHEM" (CID)	3 3 3
Foundations	UF 100 Intellectual Foundations UF 200 Civic and Ethical Foundations CHEM 495 (FF)Directed Research in Chemistry	3 3 2
Disciplinary Lens	MATH 170 Calculus I (DLM) PHYS 211,211L-212,212L Physics I &II with Calculus and Labs (DLN) Visual and Performing Arts (DLV) Literature and Humanities (DLL) <i>MSED 311 Perspectives on Science and Mathematics (IDoTeach)</i> Social Sciences (DLS) <i>MSED 210 Knowing and Learning (IDoTeach)</i> <i>ED-CIFS 201 Foundations of Education (IDoTeach)</i>	4 10 3  3 3 3
Major	MSED 101 STEP 1 (IDoTeach) MSED 102 STEP 2 (IDoTeach) MSED 310 Classroom Interactions (IDoTeach) MSED 410 Project-Based Instruction (IDoTeach) MSED 480 Apprentice Teaching (IDoTeach) GENSCI 3xx Research Methods (IDoTeach)  CHEM 111,111L-112,112L General Chemistry I & II with Labs CHEM 211, 212 Analytical Chemistry I and Lab CHEM 307, 308-309, 310 Organic Chemistry I & II with Labs CHEM 321, 322 Physical Chemistry Lecture CHEM 323 Advanced Synthesis Laboratory CHEM 324 Physical Chemistry Laboratory CHEM 401 Advanced Inorganic Chemistry CHEM 411 Analytical Chemistry II CHEM 412 Analytical Chemistry Laboratory II CHEM 498 Seminar MATH 175 Calculus II MATH 275 Multivariable and Vector Calculus MATH 3xx Functions and Modeling (IDoTeach)  One or more additional courses chosen from the following for a minimum of 3 credits: CHEM 422 Advanced Topics in Chemistry CHEM 440 Spectrometric Identification	1 1 3 3 6 3  8 5 10 6 2 2 3 3 2 2 4 4 3  3  3 3
	Electives to total 120 credits	3
	Total	120

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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education


Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Geosciences

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Geosciences, emphasis in STEM Secondary Education		
Degree:	Bachelor of Science		
Method of Delivery:	Face to face		
CIP code (consult IR /Registrar)	13.1316 (earth sciences 2 <sup>nd</sup> Ed)		
Proposed Starting Date:	Fall 2012 <i>Spring 2013 ps</i>		
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> <b>Statewide Responsibility</b>	

### Indicate whether this request is either of the following:

<input checked="" type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :

 *7/6/12*  
College Dean (Institution) Date


Vice President for Research (as applicable) Date


Graduate Dean (as applicable) Date

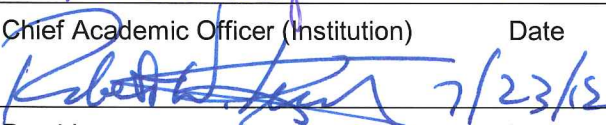
State Administrator, SDPTE (as applicable) Date

 *7/9/12*  
Chief Fiscal Officer (Institution) Date

 *7/13/12*  
Academic Affairs Program Manager Date

 *7/5/12*  
Chief Academic Officer (Institution) Date

 *7/13/12*  
Chief Academic Officer, OSBE Date

 *7/23/12*  
President Date

Chief Academic Officer, OSBE Date

SBOE/OSBE Approval Date



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuation. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes a new “Bachelor of Science in Geosciences, emphasis in STEM Secondary Education” that will replace the existing, free-standing “BS in Earth Science Education,” which is being discontinued via a separate proposal. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

The proposed emphasis is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of curricular changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

Our program, the “IDoTeach Program”, will utilize the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for our students. Each course in the program has well established learning objectives, identified artifacts of evidence of meeting objectives, assessments, instructional emphasis, and core competencies.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
1. Create a curriculum to develop secondary-level STEM educators who are better able to teach their subject matter because of the greater alignment of pedagogy and subject matter content during their college education.
  2. Create a curriculum to develop secondary-level STEM educators who are more effective at teaching STEM subjects in general because they are using the latest methodologies of STEM education as captured in the UTeach program.
  3. Recruit and retain teachers who are highly engaged and committed to improving the quality of secondary STEM education.



- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

The following measures will ensure the high quality of the proposed program:

**Regional Institutional Accreditation:** Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

**Program Review:** Internal program evaluations will take place every five years as part of the normal departmental review process conducted by the Office of the Provost. This process requires a detailed self study (including outcome assessments) and a comprehensive review and site visit by external evaluators. Each of the involved STEM departments (Biological Sciences, Chemistry & Biochemistry, Geosciences, Mathematics, and Physics) will, as part of their normal program review process, have their secondary education programs reviewed.

**Specialized Accreditation:** The College of Education (COE) programs, including STEM secondary education programs, are accredited by the National Council for Accreditation of Teacher Education (NCATE) and the program in question will continue be reviewed by NCATE. The COE just completed an NCATE review in 2008-09 and as a result, a COE assessment committee has developed new procedures for ensuring the quality of programs within the COE, to include assessment and data reporting procedures.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*

NOTE: The curriculum for the IDoTeach program is being adopted and adapted from the UTeach teacher preparation program out of the University of Texas.

**IDoTeach Courses:**

**MSED 101 Step 1: Inquiry Approaches to Teaching – (1 credit)** Step 1 allows students to explore teaching as a career. Following an introduction to the theory and practice behind excellent inquiry-based science and mathematics instruction, students teach lessons in elementary classrooms to obtain firsthand experience in planning and implementation.

**MSED 102 Step 2: Inquiry-Based Lesson Design – (1 credit)** In Step 2, the second 1-credit exploratory course, students continue developing the lesson planning skills learned in Step 1 as they become familiar with exemplary middle school science curricula. After observing a lesson being taught in a local school district classroom, students work alone or in pairs to themselves plan and teach three inquiry-based lessons to sixth, seventh, or eighth graders.

**MSED 210 Knowing and Learning in Mathematics and Science – (3 credits)** Knowing and Learning in Mathematics and Science is the first in a sequence of three, 3-credit college of education courses in the IDoTeach program. It is followed by Classroom Interactions and Project-Based Instruction. Knowing and Learning is more than simply a general survey of theories in the STEM fields, its goal is for students to construct a model of knowing and learning that will guide their future classroom practice. The Knowing and Learning course fulfills a social science core requirement.

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**MSED 310 Classroom Interactions – (3 credits)** Classroom Interactions is typically the fourth IDoTeach course taken by students and the second in a series of three, 3-credit College of Education courses. It follows Knowing and Learning and precedes Project-Based Instruction. Classroom Interactions builds on the Knowing and Learning course, moving from a focus on thinking and learning to a focus on teaching and learning. The course is centered around a close examination of the interplay between teachers, students, and content, and how these types of interactions enable students to develop deep conceptual understanding. Prospective teachers are also introduced to ways in which curriculum and technology are used in classroom settings to build interrelationships among teachers and students. They are taught how content and pedagogy combine to make effective teaching.

**MSED 410 Project-Based Instruction – (3 credits)** Project-Based Instruction (PBI) is the capstone course in the sequence of professional development courses (Knowing and Learning, Classroom Interactions, and PBI) IDoTeach students take prior to Apprentice Teaching. PBI is the course in which a number of the major principles and themes of the IDoTeach program—integration of mathematics and science content; infusion of technology in representation, analysis, modeling, assessment and contextualization of content; immersion in intensive field-based experiences; and a focus on designing equitable learning environments—are synthesized as the students develop an intellectually challenging project-based instructional unit. When students complete PBI, they are fully prepared for Apprentice Teaching.

**GENSCI 3xx Research Methods – (3 credits)** Research Methods is a one-semester three-hour course in the required IDoTeach sequence. It is one of several content courses specially designed to meet the needs of future teachers (others include Perspectives on Science and Mathematics and Functions and Modeling). It also fulfills multiple degree requirements. Sections are limited to 30 students, who meet two hours per week for non-traditional, interactive lectures and two hours per week for lab. The course is cross-listed between Physics, Chemistry, and Biology.

**MSED 311 Perspectives on Science and Mathematics – (3 credits)** Perspectives on Science and Mathematics is a 3 credit upper-division history course designed to meet the unique needs of future teachers. It is one of the specially designed content courses in the IDoTeach sequence (others include Functions and Modeling and Research Methods) that fulfills multiple degree requirements. The Perspectives fulfills the requirement for a Disciplinary Lens course in Literature and Humanities.

**MATH 3xx Functions and Modeling – (3 credits)** Functions and Modeling is a mathematics course designed to address the unique needs of future teachers of mathematics. It is required of IDoTeach math majors and also counts toward their mathematics degree. In this course, students engage in explorations and lab activities designed to strengthen and expand their knowledge of the topics found in secondary mathematics. Students collect data and explore a variety of situations that can be modeled using linear, exponential, polynomial, and trigonometric functions. Activities are designed to have them take a second, deeper look at topics they should have been exposed to previously; illuminate the connections between secondary and college mathematics; illustrate good uses of technology in teaching; illuminate the connections between various areas of mathematics; and engage them in serious (i.e., non-routine) problem solving, problem-based learning, and applications of mathematics.

**MSED 480 Apprentice Teaching – (6 credits)** The purpose of Apprentice Teaching is to offer IDoTeach students a culminating experience that provides them with the tools needed for their first teaching jobs. In Apprentice Teaching, students are immersed in the expectations,



processes, and rewards of teaching. When making placements, IDOTeach master teachers consider each apprentice teacher's characteristics and abilities as well as the cooperating teacher's teaching and mentoring styles. The hope is that the complementary strengths of the IDOTeach apprentice teacher and cooperating teacher will generate a synergism that benefits both people professionally.

**5. Please provide the program completion requirements and attach to this proposal as Appendix**

**A.** *This question is not applicable to requests for discontinuance.*

Credit hours required in major (inside and outside of major dept):	79-83
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	36-37
Credit hours in electives courses:	0-5
<b>Total credit hours required for completion:</b>	<b>120</b>

**6. Identify similar programs offered within Idaho or in the region by other**

**colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

<b>Institution and Degree name</b>	<b>Level</b>	<b>Specializations within the discipline (to reflect a national perspective)</b>	<b>Specializations offered within the degree at the institution</b>
<b>BSU</b>	Bachelor's	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b> B.S. Biology B.S. Chemistry B.S. Geology B.S. Mathematics B.S. Physics	Bachelor's		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

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<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science Sec Ed. Mathematics Sec Ed. Natural Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>NIC</b>			
<b>UI</b> BS in Biology BS in Chemistry BS in Geosciences BS in Math BS in Physics B.Ed. In Secondary Education	Bachelor's		(Students take a major in a STEM department and complete a degree in secondary education.) Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

Our projected enrollments in and graduates from the IDoTeach program, which will include all students enrolled in science & math secondary education programs and in the certificate program, are shown below.

The assumptions used are as follows:

1. The program will accommodate 32 new students the first year of the program, 64 new students the second, 96 the third, and 128 the fourth and thereafter.
2. Recruiting efforts will ensure that all of those openings are filled.
3. Year to year retention is 80%.
4. By year four, 20% will have graduated, then an additional 15% by year five, and an additional 15% by year six.
5. Enrollments and number of graduates will be divided among the five math/science subject areas in roughly the same percentages as present enrollments, but with a deliberate increase in the percentages chemistry and physics subject areas. The percents used were: Biology: 22%; Chemistry: 13%; Geosciences: 6%; Mathematics: 52%, and Physics: 8%.

The retention and graduation rates used in the above estimates are higher than our present university-wide rates. However, we are confident that the structure of IDoTeach program, including substantial interaction with master teachers, tutors, advisors, will result in retention and graduation rates that are even higher than the ambitious rates used above.

Note that we estimate the program will approximately quadruple the total number of science and mathematics education graduates. We also estimate that the enrolled number of students in science secondary education programs will approximately quadruple the existing number and that the number of math secondary education majors will

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approximately double.

- 8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

See following tables.



		2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
<b>new students</b>											
	Projected number of new students entering IDoTeach program each year in Science & Math Secondary Ed programs and in the certificate program										
	Biology	6	12	18	24	24	24	24	24	24	24
	Chemistry	3	7	10	14	14	14	14	14	14	14
	Geosciences	2	3	5	7	7	7	7	7	7	7
	Mathematics	14	28	42	56	56	56	56	56	56	56
	Physics	2	4	6	9	9	9	9	9	9	9
	Certificate Only	5	10	14	19	19	19	19	19	19	19
	Totals:	32	64	96	128	128	128	128	128	128	128
<b>enrollments</b>											
	Without the IDoTeach Program: projected total enrollment of all existing science & math secondary ed programs (estimate based on historical data) were the IDoTeach program not to be created										
	Biology	33	33	33	33	33	33	33	33	33	33
	Chemistry	19	19	19	19	19	19	19	19	19	19
	Geosciences	9	9	9	9	9	9	9	9	9	9
	Mathematics	77	77	77	77	77	77	77	77	77	77
	Physics	12	12	12	12	12	12	12	12	12	12
	Certificate Only	0	0	0	0	0	0	0	0	0	0
	Totals:	150	150	150	150	150	150	150	150	150	150
	Projected Fall enrollment of students at all levels in the IDoTeach program										
	Biology	6	17	32	52	66	76	81	81	81	81
	Chemistry	3	9	18	30	38	43	46	46	46	46
	Geosciences	2	5	9	15	19	22	23	23	23	23
	Mathematics	14	39	75	123	157	179	190	190	190	190
	Physics	2	6	11	19	24	27	29	29	29	29
	Certificate Only	5	13	26	42	54	61	65	65	65	65
	Totals:	32	89	172	280	357	408	434	434	434	434
<b>source of enrollments in IDoTeach Program</b>											
	IDoTeach enrollment of students who switch from existing programs or would have been in existing programs.										
	Biology	3	6	14	19	23	28	28	28	28	28
	Chemistry	2	4	8	11	13	16	16	16	16	16
	Geosciences	1	2	4	5	7	8	8	8	8	8
	Mathematics	7	15	33	44	55	66	66	66	66	66
	Physics	1	2	5	7	8	10	10	10	10	10
	Certificate Only	2	5	11	15	19	23	23	23	23	23
	Totals:	16	35	75	100	125	150	150	150	150	150
	IDoTeach enrollment of students who would not have become Secondary teachers without the IDoTeach Program										
	Biology	3	10	18	34	43	48	53	53	53	53
	Chemistry	2	6	10	19	25	27	30	30	30	30
	Geosciences	1	3	5	10	12	14	15	15	15	15
	Mathematics	7	24	42	79	102	113	125	125	125	125
	Physics	1	4	6	12	15	17	19	19	19	19
	Certificate Only	2	8	15	27	35	39	43	43	43	43
	Totals:	16	54	97	181	233	258	284	284	284	284
<b>graduates</b>											
	Estimated number of IDoTeach graduates										
	Biology	0	0	0	0	1	3	6	9	12	12
	Chemistry	0	0	0	0	1	2	3	5	7	7
	Geosciences	0	0	0	0	0	1	2	3	3	3
	Mathematics	0	0	0	0	3	7	14	21	28	28
	Physics	0	0	0	0	0	1	2	3	4	4
	Certificate Only	0	0	0	0	1	2	5	7	10	10
	Totals:	0	0	0	0	6	16	32	48	64	64
	Projected # of grads per year from existing science & math secondary ed programs (estimate based on historical data)										
	Biology	3	3	3	3	2	1	0	0	0	0
	Chemistry	2	2	2	2	1	1	0	0	0	0
	Geosciences	1	1	1	1	1	0	0	0	0	0
	Mathematics	7	7	7	7	5	4	0	0	0	0
	Physics	1	1	1	1	1	1	0	0	0	0
	Certificate Only	2	2	2	2	2	1	0	0	0	0
	Totals:	16	16	16	16	12	8	0	0	0	0
	Total number of Science/Math Secondary Education graduates										
	Biology	3	3	3	3	3	4	6	9	12	12
	Chemistry	2	2	2	2	2	3	3	5	7	7
	Geosciences	1	1	1	1	1	1	2	3	3	3
	Mathematics	7	7	7	7	8	11	14	21	28	28
	Physics	1	1	1	1	1	2	2	3	4	4
	Certificate Only	2	2	2	2	3	4	5	7	10	10
	Totals:	16	16	16	16	18	24	32	48	64	64

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Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
<b>BSU</b> Existing programs: BS in the following: Biology Secondary Ed Chemistry Secondary Ed Geosciences Secondary Ed Mathematics Secondary Ed Physics Secondary Ed	30 8 15 80 6	38 9 19 86 2	36 5 28 87 2	4 0 1 18 0	2 0 1 6 0	1 0 1 15 0	Approx # of grads per year: ~3 ~0 ~1 ~14 ~0
<b>CSI</b>							
<b>CWI</b>							
<b>EITC</b>							
<b>ISU</b> Biology Secondary Ed Chemistry Secondary Ed Geology Secondary Ed Math Secondary Ed Physics Secondary Ed	20 1 5 31 3	28 2 3 37 3	NA NA NA NA NA	NA NA NA NA NA	1 0 0 2 0	0 0 1 1 0	
<b>LCSC</b> BA/BS in the following: Secondary Ed Biology Secondary Ed Chemistry Secondary Ed Earth Science Secondary Ed Math Secondary Ed Natural Science	13 1 3 12 7	6 4 0 18 10	0 1 1 21 11	0 0 0 1 0	0 0 0 5 0	0 0 0 1 0	Approx # of grads per year: ~0 ~0 ~0 ~2 ~0
<b>NIC</b>							
<b>U of I</b> Biology, B.S. Ed. Chemistry, B.S. Ed. Geological Science, B.S. Ed. Math, B.S. Ed. Physics, B.S. Ed. Earth Science, B.S. Ed.	23 5 2 49 3 6	22 6 1 47 2 8	12 5 1 44 4 6	5 3 1 9 0 1	3 1 0 6 1 1	5 0 0 7 1 0	Approx # of grads per year: 4 1 0 7 1 1

**9. Will this program reduce enrollments in other programs at your institution? If so, please explain.**

The new emphasis will replace an existing separate degree and will therefore take on those students presently enrolled. Additionally, because the proposed program better integrates pedagogy into the content area, it will be more attractive to students, and we expect to see a significant increase in the number of students pursuing STEM secondary education programs. However, because Boise State continues to see substantial increases in overall enrollments, it is unclear if any existing non-education programs will experience decreased enrollments.

**10. Provide verification of state workforce needs such as job titles requiring this degree.** Include State and National Department of Labor research on employment potential. *This question is not applicable to*

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requests for discontinuance.

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
<b>Region</b>				
<b>State</b>	86 science	86 science	86 science	256 science
	104 math	104 math	104 math	312 math
<b>Nation</b>				

- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

The State Department of Education has increased graduation requirements in math and science. Whereas previously a student could graduate with 2 years of math and 2 years of science, they will now be required to graduate with 3 years of math and 3 years in science. Increasing the number of required courses will require additional STEM teachers. Recently we conducted a needs assessment (current and 5 year projection) of the secondary math and science teacher needs for Idaho. Approximately 60% of Idaho's 300 secondary school principals responded to our invitation to participate. Our results indicated that there is a projected need for about 430 science and 520 math teachers in the next 5 years because of increases in graduation requirements in math and science, increased enrollment, attrition of teachers, and increased demand due to greater career and societal emphasis on STEM. Dividing the five year numbers by 5 yields the per-year numbers in the table above.

We are not filling out the "region" and "nation" rows in the above table because the focus is on producing STEM teachers for the state. The estimates above do not differentiate among the various science subject areas.

In addition, we are not using state and national labor data because it does not have sufficient granularity to be of value in this analysis, especially given that we have excellent data on need from our survey.

Please see attachments for the survey instrument and the report that resulted from the survey.

- b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

In the State of Idaho there exists a substantial shortage of college graduates in the STEM areas, and without those graduates it is difficult for the state to expand industry in the STEM fields. One way to attack the problem is to enhance the "pipeline" of students entering college who are interested in and prepared for STEM fields. And to accomplish



that enhancement of the “pipeline” requires that we produce more STEM secondary education teachers and that those teachers are better qualified.

- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

- 11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe.** *This question is not applicable to requests for discontinuance.*

Not planned at this time.

- 12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission.** *This question is not applicable to requests for discontinuance.*

By creating a better set of programs for STEM secondary education, we will create more and better-prepared STEM educators. And more/better prepared STEM educators will provide more and better STEM education to our middle and high school students. Those outcomes will serve the following aspects of the SBOE strategic plan:

**GOAL 1: A WELL EDUCATED CITIZENRY**

*The educational system will provide opportunities for individual advancement.*

*Objective A: Access - Set policy and advocate for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.*

*Objective B: Higher Level of Educational Attainment – Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system.*

*Objective D: Transition – Improve the ability of the educational system to meet educational needs and allow students to efficiently and effectively transition into the workforce.*

**GOAL 2: CRITICAL THINKING AND INNOVATION**

*The educational system will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of individuals who are entrepreneurial, broadminded, think critically, and are creative.*

*Objective B: Innovation and Creativity – Educate students who will contribute creative and innovative ideas to enhance society.*

*Objective C: Quality Instruction – Increase student performance through the recruitment and retention of a diverse and highly qualified workforce of teachers, faculty, and staff.*

- 13. Describe how this request fits with the institution's vision and/or strategic plan.** *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission Plan	Proposed Program Plans to Achieve the Goal
Goal 1: Create a signature, high-quality educational experience for all students. Strategies: Invest in faculty development, innovative pedagogies, and an engaging environment for learning.	An innovative program that incorporates pedagogy with content

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Goal 1: Create a signature, high-quality educational experience for all students. Strategy: Provide bountiful opportunities within and across disciplines for experiential learning.	Incorporates experiential learning
Goal 4: Align university programs and activities with community needs. Strategy: Include community impact in the creation and assessment of university programs and activities.	Will help meet need for STEM educators
Goal 4: Align university programs and activities with community needs. Strategy: Increase student recruitment, retention, and graduation in STEM disciplines.	Will help meet need for STEM educated students by better preparing them for college STEM programs.
Goal 4: Align university programs and activities with community needs. Strategy: Collaborate with external partners to increase Idaho students' readiness for and enrollment in higher education.	Involves substantial work in partnership with secondary schools

**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes   x   No       

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

We will recruit students to the program by introducing the program during general recruiting sessions and through advisors in the College of Arts & Sciences and the College of Engineering.

**16. Program Resource Requirements.** Using the Excel spreadsheet provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, create one certificate program and five new emphases within existing programs:**  
**Undergraduate Certificate in STEM Teaching Certification**  
**BS in Biology, emphasis in STEM secondary education**  
**BS in Chemistry, emphasis in STEM secondary education**  
**BS in Geology, emphasis in STEM secondary education**



**BS in Mathematics, emphasis in STEM secondary education  
BS in Physics, emphasis in STEM secondary education.**

**All projections of resource needs have been calculated for the entire set of new programs. However, because it is the education curriculum that will require resources and because the entire education curriculum is contained within the Undergraduate Certificate program, we are placing the resource needs for the entire set of programs into this proposal. Because there will be no change in the subject area courses taught in each of the emphasis programs (and therefore no resource requirements), the budgets of those emphasis programs reflect no resource needs. All resource needs have been consolidated in the proposal to create the Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13).**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**I. PLANNED STUDENT ENROLLMENT**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments	Please see Table 8 in Text for Estimates of Enrollments									
B. Shifting enrollments	Please see Table 8 in Text for Estimates of Graduates									

**II. REVENUE**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocati	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0

*Ongoing is defined as ongoing operating budget for the program which will become part of the base.*

*One-time is defined as one-time funding in a fiscal year and not part of the base.*

**III. EXPENDITURES**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>A. Personnel Costs</b>										
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total FTE Personnel and Costs</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	March 15, 2012	\$0



	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>										
1. Travel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>										
1. Library Resources	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



## Appendix A: Proposed Degree Box

Geoscience with Emphases in Geology, Hydrology, STEM Secondary Education Bachelor of Science	
Course Number and Title	Credits
ENGL 101 Intro to College Writing	3
ENGL 102 Intro to College Writing and Research	3
UF 100 Intellectual Foundations	3
UF 200 Civic and Ethical Foundations	3
DLM MATH 170 Calculus I	3
DLN CHEM 111, 111L General Chemistry with Lab	3
DLV Visual and Performing Arts	3
DLL Literature and Humanities	3-4
DLS Social Sciences course in first field (IDoTeach class for Secondary Ed emphasis)	3
DLS Social Sciences course in second field (IDoTeach class for Secondary Ed emphasis)	3
CHEM 112, 112L General Chemistry II with Lab	4
GEOPH 201 Seeing the Unseen: and Introduction to Geophysics	4
GEOG 360 Introduction to Geographic Information Systems	3
GEOS 200 Evolution of Western North America	4
GEOS 212 Water in the West	4
CID GOES 242 Communication in the Earth Sciences	3
GEOS 313 Geomorphology	4
FF GEOS 498 Geology Senior Seminar	1
MATH 175 Calculus II	4
MATH 254 Applied Statistics with Computers or MATH 361 Probability and Statistics	3-4
Physics Option I: (Recommended for students planning graduate studies) PHYS 211, 211L and 212, 212L Physics I & II with Calculus and Labs	8-10
Physics Option II: PHYS 111, 111L and 112, 112L General Physics	
Students must choose one of the following emphasis areas	
Geology Emphasis	
GEOS 300 Earth Materials	4
GEOS 314 Structural Geology	4
GEOS 315 Sedimentation and Stratigraphy	4
GEOS 324 Petrography	1
GEOS 345 Igneous and Metamorphic Petrology	3
GEOS 425 Whole Earth Geochemistry	3
GEOS 482 Geosciences Summer Field Camp	6
Upper-division electives to total 40 credits	4-7
Electives to total 120 credits	7-13
Hydrology Emphasis	
GEOS 411 Hydrology: Land-Atmosphere Interactions	3
GEOS 412 Hydrology: Flow in Geologic Systems	3
GEOS 426 Aqueous Geochemistry	3
GEOS 486 Geosciences Capstone	3-6
Approved Electives (12 of 15 must be upper division)	15
Upper-division electives to total 40 credits	0-8
Electives to total 120 credits	7-9
STEM Secondary Education Emphasis	
Literature and Humanities (DLL)	
MSED 311 Perspectives on Science and Mathematics (IDo Teach)	(3)
Social Sciences (DLS)	
MSED 210 Knowing and Learning (IDo Teach)	(3)
ED-CIFS 201 Foundations of Education (IDo Teach)	(3)
MSED 101 STEP 1 (IDoTeach)	1
MSED 102 STEP 2 (IDoTeach)	1
MSED 310 Classroom Interactions (IDoTeach)	3
MSED 410 Project-Based Instruction (IDoTeach)	3
MSED 480 Apprentice Teaching (IDoTeach)	6
GENSCI 3xx Research Methods (IDoTeach)	3
GEOG 213 Meteorology	3
GEOS 201 Introduction to Oceanography	3
GEOS 300 Earth Materials	4
GEOS 314 Structural Geology	4
GEOS 315 Sedimentation and Stratigraphy	4
GEOS 425 Whole Earth Geochemistry OR GEOS 426 Aqueous Geochemistry	3
Upper-division electives to total 40 credits	1-4
Electives to total 120 credits	0-5
Total	120

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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education


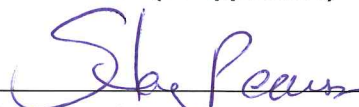
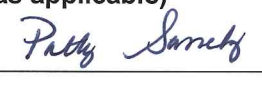
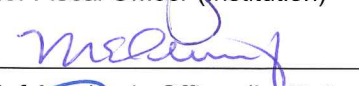

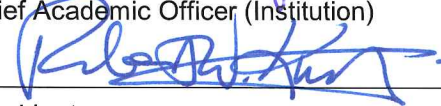
Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Mathematics

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Mathematics, emphasis in STEM Secondary Education		
Degree:	Bachelor of Science		
Method of Delivery:	Face to face		
CIP code (consult IR /Registrar)	13.1311 (Math 2 <sup>nd</sup> Ed)		
Proposed Starting Date:	Fall 2012 Spring 2013 vs		
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> <b>Statewide Responsibility</b>	

### Indicate whether this request is either of the following:

<input checked="" type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :

 College Dean (Institution)	7/16/12 Date	 Vice President for Research (as applicable)	Date
 Graduate Dean (as applicable)	Date	 State Administrator, SDPTE (as applicable)	Date
 Chief Fiscal Officer (Institution)	7/9/12 Date	 Academic Affairs Program Manager	9/18/12 Date
 Chief Academic Officer (Institution)	7/9/12 Date	 Chief Academic Officer, OSBE	9/18/12 Date
 President	7/23/12 Date	 SBOE/OSBE Approval	Date



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes a new "Bachelor of Science in Mathematics, emphasis in STEM Secondary Education" that will replace the existing, free-standing "BS in Mathematics Secondary Education," which is being discontinued via a separate proposal. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

The proposed emphasis is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of curricular changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

Our program, the "IDoTeach Program", will utilize the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for our students. Each course in the program has well established learning objectives, identified artifacts of evidence of meeting objectives, assessments, instructional emphasis, and core competencies.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
1. Create a curriculum to develop secondary-level STEM educators who are better able to teach their subject matter because of the greater alignment of pedagogy and subject matter content during their college education.
  2. Create a curriculum to develop secondary-level STEM educators who are more effective at teaching STEM subjects in general because they are using the latest methodologies of STEM education as captured in the UTeach program.
  3. Recruit and retain teachers who are highly engaged and committed to improving the quality of secondary STEM education.

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*Revised 9/5/12*



- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

The following measures will ensure the high quality of the proposed program:

**Regional Institutional Accreditation:** Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

**Program Review:** Internal program evaluations will take place every five years as part of the normal departmental review process conducted by the Office of the Provost. This process requires a detailed self study (including outcome assessments) and a comprehensive review and site visit by external evaluators. Each of the involved STEM departments (Biological Sciences, Chemistry & Biochemistry, Geosciences, Mathematics, and Physics) will, as part of their normal program review process, have their secondary education programs reviewed.

**Specialized Accreditation:** The College of Education (COE) programs, including STEM secondary education programs, are accredited by the National Council for Accreditation of Teacher Education (NCATE) and the program in question will continue be reviewed by NCATE. The COE just completed an NCATE review in 2008-09 and as a result, a COE assessment committee has developed new procedures for ensuring the quality of programs within the COE, to include assessment and data reporting procedures.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*

NOTE: The curriculum for the IDoTeach program is being adopted and adapted from the UTeach teacher preparation program out of the University of Texas.

**IDoTeach Courses:**

**MSED 101 Step 1: Inquiry Approaches to Teaching – (1 credit)** Step 1 allows students to explore teaching as a career. Following an introduction to the theory and practice behind excellent inquiry-based science and mathematics instruction, students teach lessons in elementary classrooms to obtain firsthand experience in planning and implementation.

**MSED 102 Step 2: Inquiry-Based Lesson Design – (1 credit)** In Step 2, the second 1-credit exploratory course, students continue developing the lesson planning skills learned in Step 1 as they become familiar with exemplary middle school science curricula. After observing a lesson being taught in a local school district classroom, students work alone or in pairs to themselves plan and teach three inquiry-based lessons to sixth, seventh, or eighth graders.

**MSED 210 Knowing and Learning in Mathematics and Science – (3 credits)** Knowing and Learning in Mathematics and Science is the first in a sequence of three, 3-credit college of education courses in the IDoTeach program. It is followed by Classroom Interactions and Project-Based Instruction. Knowing and Learning is more than simply a general survey of theories in the STEM fields, its goal is for students to construct a model of knowing and learning that will guide their future classroom practice. The Knowing and Learning course fulfills a social science core requirement.



**MSED 310 Classroom Interactions – (3 credits)** Classroom Interactions is typically the fourth IDoTeach course taken by students and the second in a series of three, 3-credit College of Education courses. It follows Knowing and Learning and precedes Project-Based Instruction. Classroom Interactions builds on the Knowing and Learning course, moving from a focus on thinking and learning to a focus on teaching and learning. The course is centered around a close examination of the interplay between teachers, students, and content, and how these types of interactions enable students to develop deep conceptual understanding. Prospective teachers are also introduced to ways in which curriculum and technology are used in classroom settings to build interrelationships among teachers and students. They are taught how content and pedagogy combine to make effective teaching.

**MSED 410 Project-Based Instruction – (3 credits)** Project-Based Instruction (PBI) is the capstone course in the sequence of professional development courses (Knowing and Learning, Classroom Interactions, and PBI) IDoTeach students take prior to Apprentice Teaching. PBI is the course in which a number of the major principles and themes of the IDoTeach program—integration of mathematics and science content; infusion of technology in representation, analysis, modeling, assessment and contextualization of content; immersion in intensive field-based experiences; and a focus on designing equitable learning environments—are synthesized as the students develop an intellectually challenging project-based instructional unit. When students complete PBI, they are fully prepared for Apprentice Teaching.

**GENSCI 3xx Research Methods – (3 credits)** Research Methods is a one-semester three-hour course in the required IDoTeach sequence. It is one of several content courses specially designed to meet the needs of future teachers (others include Perspectives on Science and Mathematics and Functions and Modeling). It also fulfills multiple degree requirements. Sections are limited to 30 students, who meet two hours per week for non-traditional, interactive lectures and two hours per week for lab. The course is cross-listed between Physics, Chemistry, and Biology.

**MSED 311 Perspectives on Science and Mathematics – (3 credits)** Perspectives on Science and Mathematics is a 3 credit upper-division history course designed to meet the unique needs of future teachers. It is one of the specially designed content courses in the IDoTeach sequence (others include Functions and Modeling and Research Methods) that fulfills multiple degree requirements. The Perspectives fulfills the requirement for a Disciplinary Lens course in Literature and Humanities.

**MATH 3xx Functions and Modeling – (3 credits)** Functions and Modeling is a mathematics course designed to address the unique needs of future teachers of mathematics. It is required of IDoTeach math majors and also counts toward their mathematics degree. In this course, students engage in explorations and lab activities designed to strengthen and expand their knowledge of the topics found in secondary mathematics. Students collect data and explore a variety of situations that can be modeled using linear, exponential, polynomial, and trigonometric functions. Activities are designed to have them take a second, deeper look at topics they should have been exposed to previously; illuminate the connections between secondary and college mathematics; illustrate good uses of technology in teaching; illuminate the connections between various areas of mathematics; and engage them in serious (i.e., non-routine) problem solving, problem-based learning, and applications of mathematics.

**MSED 480 Apprentice Teaching – (6 credits)** The purpose of Apprentice Teaching is to offer IDoTeach students a culminating experience that provides them with the tools needed for their first teaching jobs. In Apprentice Teaching, students are immersed in the expectations,



processes, and rewards of teaching. When making placements, IDOTeach master teachers consider each apprentice teacher's characteristics and abilities as well as the cooperating teacher's teaching and mentoring styles. The hope is that the complementary strengths of the IDOTeach apprentice teacher and cooperating teacher will generate a synergism that benefits both people professionally.

**5. Please provide the program completion requirements and attach to this proposal as Appendix**

**A.** *This question is not applicable to requests for discontinuance.*

Credit hours required in major (inside and outside of major dept):	64-65
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	35-38
Credit hours in electives courses:	17-21
<b>Total credit hours required for completion:</b>	<b>120</b>

**6. Identify similar programs offered within Idaho or in the region by other**

**colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

<b>Institution and Degree name</b>	<b>Level</b>	<b>Specializations within the discipline (to reflect a national perspective)</b>	<b>Specializations offered within the degree at the institution</b>
<b>BSU</b>	Bachelor's	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b> B.S. Biology B.S. Chemistry B.S. Geology B.S. Mathematics B.S. Physics	Bachelor's		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

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<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science Sec Ed. Mathematics Sec Ed. Natural Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>NIC</b>			
<b>UI</b> BS in Biology BS in Chemistry BS in Geosciences BS in Math BS in Physics B.Ed. In Secondary Education	Bachelor's		(Students take a major in a STEM department and complete a degree in secondary education.) Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

Our projected enrollments in and graduates from the IDoTeach program, which will include all students enrolled in science & math secondary education programs and in the certificate program, are shown below.

The assumptions used are as follows:

1. The program will accommodate 32 new students the first year of the program, 64 new students the second, 96 the third, and 128 the fourth and thereafter.
2. Recruiting efforts will ensure that all of those openings are filled.
3. Year to year retention is 80%.
4. By year four, 20% will have graduated, then an additional 15% by year five, and an additional 15% by year six.
5. Enrollments and number of graduates will be divided among the five math/science subject areas in roughly the same percentages as present enrollments, but with a deliberate increase in the percentages chemistry and physics subject areas. The percents used were: Biology: 22%; Chemistry: 13%; Geosciences: 6%; Mathematics: 52%, and Physics: 8%.

The retention and graduation rates used in the above estimates are higher than our present university-wide rates. However, we are confident that the structure of IDoTeach program, including substantial interaction with master teachers, tutors, advisors, will result in retention and graduation rates that are even higher than the ambitious rates used above.

Note that we estimate the program will approximately quadruple the total number of science and mathematics education graduates. We also estimate that the enrolled number of students in science secondary education programs will approximately quadruple the existing number and that the number of math secondary education majors will

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approximately double.

8. **Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

See following tables.



		2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
<b>new students</b>											
	Projected number of new students entering IDoTeach program each year in Science & Math Secondary Ed programs and in the certificate program										
	Biology	6	12	18	24	24	24	24	24	24	24
	Chemistry	3	7	10	14	14	14	14	14	14	14
	Geosciences	2	3	5	7	7	7	7	7	7	7
	Mathematics	14	28	42	56	56	56	56	56	56	56
	Physics	2	4	6	9	9	9	9	9	9	9
	Certificate Only	5	10	14	19	19	19	19	19	19	19
	Totals:	32	64	96	128	128	128	128	128	128	128
<b>enrollments</b>											
	Without the IDoTeach Program: projected total enrollment of all existing science & math secondary ed programs (estimate based on historical data) were the IDoTeach program not to be created										
	Biology	33	33	33	33	33	33	33	33	33	33
	Chemistry	19	19	19	19	19	19	19	19	19	19
	Geosciences	9	9	9	9	9	9	9	9	9	9
	Mathematics	77	77	77	77	77	77	77	77	77	77
	Physics	12	12	12	12	12	12	12	12	12	12
	Certificate Only	0	0	0	0	0	0	0	0	0	0
	Totals:	150	150	150	150	150	150	150	150	150	150
	Projected Fall enrollment of students at all levels in the IDoTeach program										
	Biology	6	17	32	52	66	76	81	81	81	81
	Chemistry	3	9	18	30	38	43	46	46	46	46
	Geosciences	2	5	9	15	19	22	23	23	23	23
	Mathematics	14	39	75	123	157	179	190	190	190	190
	Physics	2	6	11	19	24	27	29	29	29	29
	Certificate Only	5	13	26	42	54	61	65	65	65	65
	Totals:	32	89	172	280	357	408	434	434	434	434
<b>source of enrollments in IDoTeach Program</b>											
	IDoTeach enrollment of students who switch from existing programs or would have been in existing programs.										
	Biology	3	6	14	19	23	28	28	28	28	28
	Chemistry	2	4	8	11	13	16	16	16	16	16
	Geosciences	1	2	4	5	7	8	8	8	8	8
	Mathematics	7	15	33	44	55	66	66	66	66	66
	Physics	1	2	5	7	8	10	10	10	10	10
	Certificate Only	2	5	11	15	19	23	23	23	23	23
	Totals:	16	35	75	100	125	150	150	150	150	150
	IDoTeach enrollment of students who would not have become Secondary teachers without the IDoTeach Program										
	Biology	3	10	18	34	43	48	53	53	53	53
	Chemistry	2	6	10	19	25	27	30	30	30	30
	Geosciences	1	3	5	10	12	14	15	15	15	15
	Mathematics	7	24	42	79	102	113	125	125	125	125
	Physics	1	4	6	12	15	17	19	19	19	19
	Certificate Only	2	8	15	27	35	39	43	43	43	43
	Totals:	16	54	97	181	233	258	284	284	284	284
<b>graduates</b>											
	Estimated number of IDoTeach graduates										
	Biology	0	0	0	0	1	3	6	9	12	12
	Chemistry	0	0	0	0	1	2	3	5	7	7
	Geosciences	0	0	0	0	0	1	2	3	3	3
	Mathematics	0	0	0	0	3	7	14	21	28	28
	Physics	0	0	0	0	0	1	2	3	4	4
	Certificate Only	0	0	0	0	1	2	5	7	10	10
	Totals:	0	0	0	0	6	16	32	48	64	64
	Projected # of grads per year from existing science & math secondary ed programs (estimate based on historical data)										
	Biology	3	3	3	3	2	1	0	0	0	0
	Chemistry	2	2	2	2	1	1	0	0	0	0
	Geosciences	1	1	1	1	1	0	0	0	0	0
	Mathematics	7	7	7	7	5	4	0	0	0	0
	Physics	1	1	1	1	1	1	0	0	0	0
	Certificate Only	2	2	2	2	2	1	0	0	0	0
	Totals:	16	16	16	16	12	8	0	0	0	0
	Total number of Science/Math Secondary Education graduates										
	Biology	3	3	3	3	3	4	6	9	12	12
	Chemistry	2	2	2	2	2	3	3	5	7	7
	Geosciences	1	1	1	1	1	1	2	3	3	3
	Mathematics	7	7	7	7	8	11	14	21	28	28
	Physics	1	1	1	1	1	2	2	3	4	4
	Certificate Only	2	2	2	2	3	4	5	7	10	10
	Totals:	16	16	16	16	18	24	32	48	64	64

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Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
<b>BSU</b> Existing programs: BS in the following:							Approx # of grads per year:
Biology Secondary Ed	30	38	36	4	2	1	~3
Chemistry Secondary Ed	8	9	5	0	0	0	~0
Geosciences Secondary Ed	15	19	28	1	1	1	~1
Mathematics Secondary Ed	80	86	87	18	6	15	~14
Physics Secondary Ed	6	2	2	0	0	0	~0
<b>CSI</b>							
<b>CWI</b>							
<b>EITC</b>							
<b>ISU</b>							
Biology Secondary Ed	20	28	NA	NA	1	0	
Chemistry Secondary Ed	1	2	NA	NA	0	0	
Geology Secondary Ed	5	3	NA	NA	0	1	
Math Secondary Ed	31	37	NA	NA	2	1	
Physics Secondary Ed	3	3	NA	NA	0	0	
<b>LCSC</b> BA/BS in the following:							Approx # of grads per year:
Secondary Ed Biology	13	6	0	0	0	0	~0
Secondary Ed Chemistry	1	4	1	0	0	0	~0
Secondary Ed Earth Science	3	0	1	0	0	0	~0
Secondary Ed Math	12	18	21	1	5	1	~2
Secondary Ed Natural Science	7	10	11	0	0	0	~0
<b>NIC</b>							
<b>U of I</b>							Approx # of grads per year:
Biology, B.S. Ed.	23	22	12	5	3	5	4
Chemistry, B.S. Ed.	5	6	5	3	1	0	1
Geological Science, B.S. Ed.	2	1	1	1	0	0	0
Math, B.S. Ed.	49	47	44	9	6	7	7
Physics, B.S. Ed.	3	2	4	0	1	1	1
Earth Science, B.S. Ed.	6	8	6	1	1	0	1

**9. Will this program reduce enrollments in other programs at your institution? If so, please explain.**

The new emphasis will replace an existing separate degree and will therefore take on those students presently enrolled. Additionally, because the proposed program better integrates pedagogy into the content area, it will be more attractive to students, and we expect to see a significant increase in the number of students pursuing STEM secondary education programs. However, because Boise State continues to see substantial increases in overall enrollments, it is unclear if any existing non-education programs will experience decreased enrollments.

**10. Provide verification of state workforce needs such as job titles requiring this degree.** Include State and National Department of Labor research on employment potential. *This question is not applicable to*

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requests for discontinuance.

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
<b>Region</b>				
<b>State</b>	86 science	86 science	86 science	256 science
	104 math	104 math	104 math	312 math
<b>Nation</b>				

- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

The State Department of Education has increased graduation requirements in math and science. Whereas previously a student could graduate with 2 years of math and 2 years of science, they will now be required to graduate with 3 years of math and 3 years in science. Increasing the number of required courses will require additional STEM teachers. Recently we conducted a needs assessment (current and 5 year projection) of the secondary math and science teacher needs for Idaho. Approximately 60% of Idaho's 300 secondary school principals responded to our invitation to participate. Our results indicated that there is a projected need for about 430 science and 520 math teachers in the next 5 years because of increases in graduation requirements in math and science, increased enrollment, attrition of teachers, and increased demand due to greater career and societal emphasis on STEM. Dividing the five year numbers by 5 yields the per-year numbers in the table above.

We are not filling out the "region" and "nation" rows in the above table because the focus is on producing STEM teachers for the state. The estimates above do not differentiate among the various science subject areas.

In addition, we are not using state and national labor data because it does not have sufficient granularity to be of value in this analysis, especially given that we have excellent data on need from our survey.

Please see attachments for the survey instrument and the report that resulted from the survey

- b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

In the State of Idaho there exists a substantial shortage of college graduates in the STEM areas, and without those graduates it is difficult for the state to expand industry in the STEM fields. One way to attack the problem is to enhance the "pipeline" of students entering college who are interested in and prepared for STEM fields. And to accomplish that enhancement of the "pipeline" requires that we produce more STEM secondary



education teachers and that those teachers are better qualified.

- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

- 11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe.** *This question is not applicable to requests for discontinuance.*

Not planned at this time.

- 12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission.** *This question is not applicable to requests for discontinuance.*

By creating a better set of programs for STEM secondary education, we will create more and better-prepared STEM educators. And more/better prepared STEM educators will provide more and better STEM education to our middle and high school students. Those outcomes will serve the following aspects of the SBOE strategic plan:

**GOAL 1: A WELL EDUCATED CITIZENRY**

*The educational system will provide opportunities for individual advancement.*

*Objective A: Access - Set policy and advocate for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.*

*Objective B: Higher Level of Educational Attainment – Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system.*

*Objective D: Transition – Improve the ability of the educational system to meet educational needs and allow students to efficiently and effectively transition into the workforce.*

**GOAL 2: CRITICAL THINKING AND INNOVATION**

*The educational system will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of individuals who are entrepreneurial, broadminded, think critically, and are creative.*

*Objective B: Innovation and Creativity – Educate students who will contribute creative and innovative ideas to enhance society.*

*Objective C: Quality Instruction – Increase student performance through the recruitment and retention of a diverse and highly qualified workforce of teachers, faculty, and staff.*

- 13. Describe how this request fits with the institution's vision and/or strategic plan.** *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission Plan	Proposed Program Plans to Achieve the Goal
Goal 1: Create a signature, high-quality educational experience for all students. Strategies: Invest in faculty development, innovative pedagogies, and an engaging environment for learning.	An innovative program that incorporates pedagogy with content

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Goal 1: Create a signature, high-quality educational experience for all students. Strategy: Provide bountiful opportunities within and across disciplines for experiential learning.	Incorporates experiential learning
Goal 4: Align university programs and activities with community needs. Strategy: Include community impact in the creation and assessment of university programs and activities.	Will help meet need for STEM educators
Goal 4: Align university programs and activities with community needs. Strategy: Increase student recruitment, retention, and graduation in STEM disciplines.	Will help meet need for STEM educated students by better preparing them for college STEM programs.
Goal 4: Align university programs and activities with community needs. Strategy: Collaborate with external partners to increase Idaho students' readiness for and enrollment in higher education.	Involves substantial work in partnership with secondary schools

**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes   x   No       

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

We will recruit students to the program by introducing the program during general recruiting sessions and through advisors in the College of Arts & Sciences and the College of Engineering.

**16. Program Resource Requirements.** Using the Excel spreadsheet provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, create one certificate program and five new emphases within existing programs:**  
**Undergraduate Certificate in STEM Teaching Certification**  
**BS in Biology, emphasis in STEM secondary education**  
**BS in Chemistry, emphasis in STEM secondary education**  
**BS in Geology, emphasis in STEM secondary education**



**BS in Mathematics, emphasis in STEM secondary education  
BS in Physics, emphasis in STEM secondary education.**

**All projections of resource needs have been calculated for the entire set of new programs. However, because it is the education curriculum that will require resources and because the entire education curriculum is contained within the Undergraduate Certificate program, we are placing the resource needs for the entire set of programs into this proposal. Because there will be no change in the subject area courses taught in each of the emphasis programs (and therefore no resource requirements), the budgets of those emphasis programs reflect no resource needs. All resource needs have been consolidated in the proposal to create the Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13).**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**I. PLANNED STUDENT ENROLLMENT**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments	Please see Table 8 in Text for Estimates of Enrollments									
B. Shifting enrollments	Please see Table 8 in Text for Estimates of Graduates									

**II. REVENUE**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocat	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Revenue</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0</b>

Ongoing is defined as ongoing operating budget for the program which will become part of the base.

One-time is defined as one-time funding in a fiscal year and not part of the base.

**III. EXPENDITURES**

	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>A. Personnel Costs</b>										
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total FTE Personnel and Costs</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>\$0</b>	<b>\$0.00</b>	<b>March 15, 2012 \$0</b>	



	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditu</b>										
1. Travel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>										
1. Library Resources	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



## Appendix A: Proposed Degree Box

Mathematics, STEM Secondary Education Emphasis Bachelor of Science		
Content	Course Number and Title	Credits
Communication	<i>English Composition</i>	
	ENGL 101 Introduction to College Writing	3
	ENGL 102 Intro to College Writing and Research	3
Foundations	MATH 287 Communication in the Mathematical Sciences (CID)	3
	UF 100 Intellectual Foundations	3
	UF 200 Civic and Ethical Foundations	3
	MATH 401 (FF) Senior Thesis in the Mathematical Sciences	1
Disciplinary Lens	MATH 170 Calculus I (DLM)	4
	Natural and Physical Sciences (DLN)	7-10*
	Choose from the following:	
	BIOL 191 General Biology I	
	CHEM 111,111L General Chemistry I with Lab	
	PHYS 211,211L Physics I with Calculus and Lab	
	Visual and Performing Arts (DLV)	3
	Literature and Humanities (DLL)	
	MSED 311 Perspectives on Science and Mathematics (IDoTeach)	3
	Social Sciences (DLS)	
	MSED 210 Knowing and Learning (IDoTeach)	3
	ED-CIFS 201 Foundations of Education (IDoTeach)	3
Major	MSED 101 STEP 1(IDoTeach)	1
	MSED 102 STEP 2(IDoTeach)	1
	MSED 310 Classroom Interactions (IDoTeach)	3
	MSED 410 Project-Based Instruction (IDoTeach)	3
	MSED 480 Apprentice Teaching (IDoTeach)	6
	GENSCI 3xx Research Methods (IDoTeach)	3
	One of the following:	4-5*
	BIOL 192 General Biology II	
	CHEM 112,112L General Chemistry II with Lab	
	PHYS 212,212L Physics II with Calculus and Lab	
	*Note: PHYS 212,212L is an approved DLN course. When taking the PHYS 211-212 sequence both the DLN requirement and Science Requirement above are satisfied with a just two courses for a total of 10 credits. Otherwise the combined requirement is three courses for 11-14 credits.	
	MATH 175 Calculus II	4
	MATH 187 Discrete and Foundational Mathematics I	4
	MATH 211 Geometry for the Classroom	3
	MATH 261 Statistics for the Classroom	3
	MATH 275 Multivariable and Vector Calculus	4
	MATH 298 Mathematics Education Seminar I	1
	MATH 301 Introduction to Linear Algebra	3
	MATH 305 Introduction to Abstract Algebra and Number Theory	3
	MATH 311 Foundations of Geometry	3
	MATH 314 Foundations of Analysis	3
	MATH 3xx Functions and Modeling (IDoTeach)	3
	MATH 361 Probability and Statistics	3
	MATH 405 Abstract Algebra	3
	MATH 498 Mathematics Education Seminar II	1
Electives to total 120 credits		17-21
Total		120

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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education

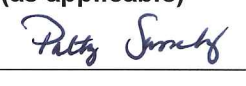
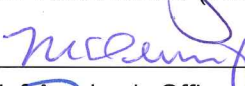
Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Physics

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Physics, emphasis in STEM Secondary Education	
Degree:	Bachelor of Science	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.1329 (physics 2 <sup>nd</sup> Ed)	
Proposed Starting Date:	<del>Fall 2012</del> Spring 2013 ?	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> <b>Statewide Responsibility</b>

### Indicate whether this request is either of the following:

<input checked="" type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :

 College Dean (Institution)	<u>7/6/12</u> Date	 Vice President for Research (as applicable)	 Date
 Graduate Dean (as applicable)	 Date	 State Administrator, SDPTE (as applicable)	 Date
 Chief Fiscal Officer (Institution)	<u>7/9/12</u> Date	 Academic Affairs Program Manager	<u>9/13/12</u> Date
 Chief Academic Officer (Institution)	<u>7/5/12</u> Date	 Chief Academic Officer, OSBE	<u>7/13/12</u> Date
 President	<u>7/23/12</u> Date	 SBOE/OSBE Approval	 Date



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes a new "Bachelor of Science in Physics, emphasis in STEM Secondary Education" that will replace the existing, free-standing "BS in Physics Secondary Education," which is being discontinued via a separate proposal. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

The proposed emphasis is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of curricular changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

Our program, the "IDoTeach Program", will utilize the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for our students. Each course in the program has well established learning objectives, identified artifacts of evidence of meeting objectives, assessments, instructional emphasis, and core competencies.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
1. Create a curriculum to develop secondary-level STEM educators who are better able to teach their subject matter because of the greater alignment of pedagogy and subject matter content during their college education.
  2. Create a curriculum to develop secondary-level STEM educators who are more effective at teaching STEM subjects in general because they are using the latest methodologies of STEM education as captured in the UTeach program.
  3. Recruit and retain teachers who are highly engaged and committed to improving the quality of secondary STEM education.

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*Revised 6/6/12*



- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*

The following measures will ensure the high quality of the proposed program:

**Regional Institutional Accreditation:** Boise State University is regionally accredited by the Northwest Commission on Colleges and Universities (NWCCU). Regional accreditation of the university has been continuous since initial accreditation was conferred in 1941. Boise State University is currently accredited at all degree levels (A, B, M, D).

**Program Review:** Internal program evaluations will take place every five years as part of the normal departmental review process conducted by the Office of the Provost. This process requires a detailed self study (including outcome assessments) and a comprehensive review and site visit by external evaluators. Each of the involved STEM departments (Biological Sciences, Chemistry & Biochemistry, Geosciences, Mathematics, and Physics) will, as part of their normal program review process, have their secondary education programs reviewed.

**Specialized Accreditation:** The College of Education (COE) programs, including STEM secondary education programs, are accredited by the National Council for Accreditation of Teacher Education (NCATE) and the program in question will continue be reviewed by NCATE. The COE just completed an NCATE review in 2008-09 and as a result, a COE assessment committee has developed new procedures for ensuring the quality of programs within the COE, to include assessment and data reporting procedures.

- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*

NOTE: The curriculum for the IDoTeach program is being adopted and adapted from the UTeach teacher preparation program out of the University of Texas.

**IDoTeach Courses:**

**MSED 101 Step 1: Inquiry Approaches to Teaching – (1 credit)** Step 1 allows students to explore teaching as a career. Following an introduction to the theory and practice behind excellent inquiry-based science and mathematics instruction, students teach lessons in elementary classrooms to obtain firsthand experience in planning and implementation.

**MSED 102 Step 2: Inquiry-Based Lesson Design – (1 credit)** In Step 2, the second 1-credit exploratory course, students continue developing the lesson planning skills learned in Step 1 as they become familiar with exemplary middle school science curricula. After observing a lesson being taught in a local school district classroom, students work alone or in pairs to themselves plan and teach three inquiry-based lessons to sixth, seventh, or eighth graders.

**MSED 210 Knowing and Learning in Mathematics and Science – (3 credits)** Knowing and Learning in Mathematics and Science is the first in a sequence of three, 3-credit college of education courses in the IDoTeach program. It is followed by Classroom Interactions and Project-Based Instruction. Knowing and Learning is more than simply a general survey of theories in the STEM fields, its goal is for students to construct a model of knowing and learning that will guide their future classroom practice. The Knowing and Learning course fulfills a social science core requirement.



**MSED 310 Classroom Interactions – (3 credits)** Classroom Interactions is typically the fourth IDoTeach course taken by students and the second in a series of three, 3-credit College of Education courses. It follows Knowing and Learning and precedes Project-Based Instruction. Classroom Interactions builds on the Knowing and Learning course, moving from a focus on thinking and learning to a focus on teaching and learning. The course is centered around a close examination of the interplay between teachers, students, and content, and how these types of interactions enable students to develop deep conceptual understanding. Prospective teachers are also introduced to ways in which curriculum and technology are used in classroom settings to build interrelationships among teachers and students. They are taught how content and pedagogy combine to make effective teaching.

**MSED 410 Project-Based Instruction – (3 credits)** Project-Based Instruction (PBI) is the capstone course in the sequence of professional development courses (Knowing and Learning, Classroom Interactions, and PBI) IDoTeach students take prior to Apprentice Teaching. PBI is the course in which a number of the major principles and themes of the IDoTeach program—integration of mathematics and science content; infusion of technology in representation, analysis, modeling, assessment and contextualization of content; immersion in intensive field-based experiences; and a focus on designing equitable learning environments—are synthesized as the students develop an intellectually challenging project-based instructional unit. When students complete PBI, they are fully prepared for Apprentice Teaching.

**GENSCI 3xx Research Methods – (3 credits)** Research Methods is a one-semester three-hour course in the required IDoTeach sequence. It is one of several content courses specially designed to meet the needs of future teachers (others include Perspectives on Science and Mathematics and Functions and Modeling). It also fulfills multiple degree requirements. Sections are limited to 30 students, who meet two hours per week for non-traditional, interactive lectures and two hours per week for lab. The course is cross-listed between Physics, Chemistry, and Biology.

**MSED 311 Perspectives on Science and Mathematics – (3 credits)** Perspectives on Science and Mathematics is a 3 credit upper-division history course designed to meet the unique needs of future teachers. It is one of the specially designed content courses in the IDoTeach sequence (others include Functions and Modeling and Research Methods) that fulfills multiple degree requirements. The Perspectives fulfills the requirement for a Disciplinary Lens course in Literature and Humanities.

**MATH 3xx Functions and Modeling – (3 credits)** Functions and Modeling is a mathematics course designed to address the unique needs of future teachers of mathematics. It is required of IDoTeach math majors and also counts toward their mathematics degree. In this course, students engage in explorations and lab activities designed to strengthen and expand their knowledge of the topics found in secondary mathematics. Students collect data and explore a variety of situations that can be modeled using linear, exponential, polynomial, and trigonometric functions. Activities are designed to have them take a second, deeper look at topics they should have been exposed to previously; illuminate the connections between secondary and college mathematics; illustrate good uses of technology in teaching; illuminate the connections between various areas of mathematics; and engage them in serious (i.e., non-routine) problem solving, problem-based learning, and applications of mathematics.

**MSED 480 Apprentice Teaching – (6 credits)** The purpose of Apprentice Teaching is to offer IDoTeach students a culminating experience that provides them with the tools needed for their first teaching jobs. In Apprentice Teaching, students are immersed in the expectations,



processes, and rewards of teaching. When making placements, IDOTeach master teachers consider each apprentice teacher's characteristics and abilities as well as the cooperating teacher's teaching and mentoring styles. The hope is that the complementary strengths of the IDOTeach apprentice teacher and cooperating teacher will generate a synergism that benefits both people professionally.

- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*

Credit hours required in major (inside and outside of major dept):	75
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	38-39
Credit hours in electives courses:	6-7
<b>Total credit hours required for completion:</b>	<b>120</b>

- 6. Identify similar programs offered within Idaho or in the region by other colleges/universities.** If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**Degrees/Certificates offered by school/college or program(s) within disciplinary area under review**

Institution and Degree name	Level	Specializations within the discipline (to reflect a national perspective)	Specializations offered within the degree at the institution
<b>BSU</b>	Bachelor's	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science	Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>CSI</b>			
<b>CWI</b>			
<b>EITC</b>			
<b>ISU</b> B.S. Biology B.S. Chemistry B.S. Geology B.S. Mathematics B.S. Physics	Bachelor's		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

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<b>LCSC</b> Sec Ed. Biology Sec Ed. Chemistry Sec. Ed. Earth Science Sec Ed. Mathematics Sec Ed. Natural Science	BA or BS		Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science
<b>NIC</b>			
<b>UI</b> BS in Biology BS in Chemistry BS in Geosciences BS in Math BS in Physics B.Ed. In Secondary Education	Bachelor's		(Students take a major in a STEM department and complete a degree in secondary education.) Secondary Education: Biology Secondary Education: Chemistry Secondary Education: Earth Science Secondary Education: Math. Secondary Education: Natural Science

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

Our projected enrollments in and graduates from the IDoTeach program, which will include all students enrolled in science & math secondary education programs and in the certificate program, are shown below.

The assumptions used are as follows:

1. The program will accommodate 32 new students the first year of the program, 64 new students the second, 96 the third, and 128 the fourth and thereafter.
2. Recruiting efforts will ensure that all of those openings are filled.
3. Year to year retention is 80%.
4. By year four, 20% will have graduated, then an additional 15% by year five, and an additional 15% by year six.
5. Enrollments and number of graduates will be divided among the five math/science subject areas in roughly the same percentages as present enrollments, but with a deliberate increase in the percentages chemistry and physics subject areas. The percents used were: Biology: 22%; Chemistry: 13%; Geosciences: 6%; Mathematics: 52%, and Physics: 8%.

The retention and graduation rates used in the above estimates are higher than our present university-wide rates. However, we are confident that the structure of IDoTeach program, including substantial interaction with master teachers, tutors, advisors, will result in retention and graduation rates that are even higher than the ambitious rates used above.

Note that we estimate the program will approximately quadruple the total number of science and mathematics education graduates. We also estimate that the enrolled number of students in science secondary education programs will approximately quadruple the existing number and that the number of math secondary education majors will

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approximately double.

8. **Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

See following tables.



		2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
<b>new students</b>											
	Projected number of new students entering IDoTeach program each year in Science & Math Secondary Ed programs and in the certificate program										
	Biology	6	12	18	24	24	24	24	24	24	24
	Chemistry	3	7	10	14	14	14	14	14	14	14
	Geosciences	2	3	5	7	7	7	7	7	7	7
	Mathematics	14	28	42	56	56	56	56	56	56	56
	Physics	2	4	6	9	9	9	9	9	9	9
	Certificate Only	5	10	14	19	19	19	19	19	19	19
	Totals:	32	64	96	128	128	128	128	128	128	128
<b>enrollments</b>											
	Without the IDoTeach Program: projected total enrollment of all existing science & math secondary ed programs (estimate based on historical data) were the IDoTeach program not to be created										
	Biology	33	33	33	33	33	33	33	33	33	33
	Chemistry	19	19	19	19	19	19	19	19	19	19
	Geosciences	9	9	9	9	9	9	9	9	9	9
	Mathematics	77	77	77	77	77	77	77	77	77	77
	Physics	12	12	12	12	12	12	12	12	12	12
	Certificate Only	0	0	0	0	0	0	0	0	0	0
	Totals:	150	150	150	150	150	150	150	150	150	150
	Projected Fall enrollment of students at all levels in the IDoTeach program										
	Biology	6	17	32	52	66	76	81	81	81	81
	Chemistry	3	9	18	30	38	43	46	46	46	46
	Geosciences	2	5	9	15	19	22	23	23	23	23
	Mathematics	14	39	75	123	157	179	190	190	190	190
	Physics	2	6	11	19	24	27	29	29	29	29
	Certificate Only	5	13	26	42	54	61	65	65	65	65
	Totals:	32	89	172	280	357	408	434	434	434	434
<b>source of enrollments in IDoTeach Program</b>											
	IDoTeach enrollment of students who switch from existing programs or would have been in existing programs.										
	Biology	3	6	14	19	23	28	28	28	28	28
	Chemistry	2	4	8	11	13	16	16	16	16	16
	Geosciences	1	2	4	5	7	8	8	8	8	8
	Mathematics	7	15	33	44	55	66	66	66	66	66
	Physics	1	2	5	7	8	10	10	10	10	10
	Certificate Only	2	5	11	15	19	23	23	23	23	23
	Totals:	16	35	75	100	125	150	150	150	150	150
	IDoTeach enrollment of students who would not have become Secondary teachers without the IDoTeach Program										
	Biology	3	10	18	34	43	48	53	53	53	53
	Chemistry	2	6	10	19	25	27	30	30	30	30
	Geosciences	1	3	5	10	12	14	15	15	15	15
	Mathematics	7	24	42	79	102	113	125	125	125	125
	Physics	1	4	6	12	15	17	19	19	19	19
	Certificate Only	2	8	15	27	35	39	43	43	43	43
	Totals:	16	54	97	181	233	258	284	284	284	284
<b>graduates</b>											
	Estimated number of IDoTeach graduates										
	Biology	0	0	0	0	1	3	6	9	12	12
	Chemistry	0	0	0	0	1	2	3	5	7	7
	Geosciences	0	0	0	0	0	1	2	3	3	3
	Mathematics	0	0	0	0	3	7	14	21	28	28
	Physics	0	0	0	0	0	1	2	3	4	4
	Certificate Only	0	0	0	0	1	2	5	7	10	10
	Totals:	0	0	0	0	6	16	32	48	64	64
	Projected # of grads per year from existing science & math secondary ed programs (estimate based on historical data)										
	Biology	3	3	3	3	2	1	0	0	0	0
	Chemistry	2	2	2	2	1	1	0	0	0	0
	Geosciences	1	1	1	1	1	0	0	0	0	0
	Mathematics	7	7	7	7	5	4	0	0	0	0
	Physics	1	1	1	1	1	1	0	0	0	0
	Certificate Only	2	2	2	2	2	1	0	0	0	0
	Totals:	16	16	16	16	12	8	0	0	0	0
	Total number of Science/Math Secondary Education graduates										
	Biology	3	3	3	3	3	4	6	9	12	12
	Chemistry	2	2	2	2	2	3	3	5	7	7
	Geosciences	1	1	1	1	1	1	2	3	3	3
	Mathematics	7	7	7	7	8	11	14	21	28	28
	Physics	1	1	1	1	1	2	2	3	4	4
	Certificate Only	2	2	2	2	3	4	5	7	10	10
	Totals:	16	16	16	16	18	24	32	48	64	64

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Institution	Relevant Enrollment Data			Number of Graduates			Graduate Rate
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous	
<b>BSU</b> Existing programs: BS in the following: Biology Secondary Ed Chemistry Secondary Ed Geosciences Secondary Ed Mathematics Secondary Ed Physics Secondary Ed	30 8 15 80 6	38 9 19 86 2	36 5 28 87 2	4 0 1 18 0	2 0 1 6 0	1 0 1 15 0	Approx # of grads per year: ~3 ~0 ~1 ~14 ~0
<b>CSI</b>							
<b>CWI</b>							
<b>EITC</b>							
<b>ISU</b> Biology Secondary Ed Chemistry Secondary Ed Geology Secondary Ed Math Secondary Ed Physics Secondary Ed	20 1 5 31 3	28 2 3 37 3	NA NA NA NA NA	NA NA NA NA NA	1 0 0 2 0	0 0 1 1 0	
<b>LCSC</b> BA/BS in the following: Secondary Ed Biology Secondary Ed Chemistry Secondary Ed Earth Science Secondary Ed Math Secondary Ed Natural Science	13 1 3 12 7	6 4 0 18 10	0 1 1 21 11	0 0 0 1 0	0 0 0 5 0	0 0 0 1 0	Approx # of grads per year: ~0 ~0 ~0 ~2 ~0
<b>NIC</b>							
<b>U of I</b> Biology, B.S. Ed. Chemistry, B.S. Ed. Geological Science, B.S. Ed. Math, B.S. Ed. Physics, B.S. Ed. Earth Science, B.S. Ed.	23 5 2 49 3 6	22 6 1 47 2 8	12 5 1 44 4 6	5 3 1 9 0 1	3 1 0 6 1 1	5 0 0 7 1 0	Approx # of grads per year: 4 1 0 7 1 1

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

The new emphasis will replace an existing separate degree and will therefore take on those students presently enrolled. Additionally, because the proposed program better integrates pedagogy into the content area, it will be more attractive to students, and we expect to see a significant increase in the number of students pursuing STEM secondary education programs. However, because Boise State continues to see substantial increases in overall enrollments, it is unclear if any existing non-education programs will experience decreased enrollments.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to*

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requests for discontinuance.

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
<b>Region</b>				
<b>State</b>	86 science	86 science	86 science	256 science
	104 math	104 math	104 math	312 math
<b>Nation</b>				

- a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

The State Department of Education has increased graduation requirements in math and science. Whereas previously a student could graduate with 2 years of math and 2 years of science, they will now be required to graduate with 3 years of math and 3 years in science. Increasing the number of required courses will require additional STEM teachers. Recently we conducted a needs assessment (current and 5 year projection) of the secondary math and science teacher needs for Idaho. Approximately 60% of Idaho's 300 secondary school principals responded to our invitation to participate. Our results indicated that there is a projected need for about 430 science and 520 math teachers in the next 5 years because of increases in graduation requirements in math and science, increased enrollment, attrition of teachers, and increased demand due to greater career and societal emphasis on STEM. Dividing the five year numbers by 5 yields the per-year numbers in the table above.

We are not filling out the "region" and "nation" rows in the above table because the focus is on producing STEM teachers for the state. The estimates above do not differentiate among the various science subject areas.

In addition, we are not using state and national labor data because it does not have sufficient granularity to be of value in this analysis, especially given that we have excellent data on need from our survey.

Please see attachments for the survey instrument and the report that resulted from the survey.

- b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

In the State of Idaho there exists a substantial shortage of college graduates in the STEM areas, and without those graduates it is difficult for the state to expand industry in the STEM fields. One way to attack the problem is to enhance the "pipeline" of students entering college who are interested in and prepared for STEM fields. And to accomplish



that enhancement of the “pipeline” requires that we produce more STEM secondary education teachers and that those teachers are better qualified.

- c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

- 11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe.** *This question is not applicable to requests for discontinuance.*

Not planned at this time.

- 12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission.** *This question is not applicable to requests for discontinuance.*

By creating a better set of programs for STEM secondary education, we will create more and better-prepared STEM educators. And more/better prepared STEM educators will provide more and better STEM education to our middle and high school students. Those outcomes will serve the following aspects of the SBOE strategic plan:

**GOAL 1: A WELL EDUCATED CITIZENRY**

*The educational system will provide opportunities for individual advancement.*

*Objective A: Access - Set policy and advocate for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.*

*Objective B: Higher Level of Educational Attainment – Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system.*

*Objective D: Transition – Improve the ability of the educational system to meet educational needs and allow students to efficiently and effectively transition into the workforce.*

**GOAL 2: CRITICAL THINKING AND INNOVATION**

*The educational system will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of individuals who are entrepreneurial, broadminded, think critically, and are creative.*

*Objective B: Innovation and Creativity – Educate students who will contribute creative and innovative ideas to enhance society.*

*Objective C: Quality Instruction – Increase student performance through the recruitment and retention of a diverse and highly qualified workforce of teachers, faculty, and staff.*

- 13. Describe how this request fits with the institution's vision and/or strategic plan.** *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission Plan	Proposed Program Plans to Achieve the Goal
Goal 1: Create a signature, high-quality educational experience for all students. Strategies: Invest in faculty development, innovative pedagogies, and an engaging environment for learning.	An innovative program that incorporates pedagogy with content

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Goal 1: Create a signature, high-quality educational experience for all students. Strategy: Provide bountiful opportunities within and across disciplines for experiential learning.	Incorporates experiential learning
Goal 4: Align university programs and activities with community needs. Strategy: Include community impact in the creation and assessment of university programs and activities.	Will help meet need for STEM educators
Goal 4: Align university programs and activities with community needs. Strategy: Increase student recruitment, retention, and graduation in STEM disciplines.	Will help meet need for STEM educated students by better preparing them for college STEM programs.
Goal 4: Align university programs and activities with community needs. Strategy: Collaborate with external partners to increase Idaho students' readiness for and enrollment in higher education.	Involves substantial work in partnership with secondary schools

**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes   x   No       

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

We will recruit students to the program by introducing the program during general recruiting sessions and through advisors in the College of Arts & Sciences and the College of Engineering.

**16. Program Resource Requirements.** Using the Excel spreadsheet provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, create one certificate program and five new emphases within existing programs:**  
**Undergraduate Certificate in STEM Teaching Certification**  
**BS in Biology, emphasis in STEM secondary education**  
**BS in Chemistry, emphasis in STEM secondary education**  
**BS in Geology, emphasis in STEM secondary education**



**BS in Mathematics, emphasis in STEM secondary education  
BS in Physics, emphasis in STEM secondary education.**

**All projections of resource needs have been calculated for the entire set of new programs. However, because it is the education curriculum that will require resources and because the entire education curriculum is contained within the Undergraduate Certificate program, we are placing the resource needs for the entire set of programs into this proposal. Because there will be no change in the subject area courses taught in each of the emphasis programs (and therefore no resource requirements), the budgets of those emphasis programs reflect no resource needs. All resource needs have been consolidated in the proposal to create the Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13).**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

<b>I. PLANNED STUDENT ENROLLMENT</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*		
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	
A. New enrollments	Please see Table 8 in Text for Estimates of Enrollments										
B. Shifting enrollments	Please see Table 8 in Text for Estimates of Graduates										
<b>II. REVENUE</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
1. Appropriated (Reallocation)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	
<i>Ongoing is defined as ongoing operating budget for the program which will become part of the base.</i>											
<i>One-time is defined as one-time funding in a fiscal year and not part of the base.</i>											
<b>III. EXPENDITURES</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
<b>A. Personnel Costs</b>											
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total FTE Personnel and Costs</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	<b>March 15, 2012</b>		



**TAB 2 Page 107**



## Appendix A: Proposed Degree Box

Physics, STEM Secondary Education Emphasis Bachelor of Science	
Course Number and Title	Credits
<b>Foundational Studies</b>	
ENGL 101 Introduction to College Writing	3
ENGL 102 Intro to College Writing and Research	3
UF 100 Intellectual Foundations	3
UF 200 Civic and Ethical Foundations	3
DLM MATH 170 Calculus I	4
DLN PHYS 211, 211L Physics I with Calculus & Lab	5
DLN PHYS 212, 212L Physics II with Calculus & Lab	5
DLV Visual and Performing Arts	3
DLL Literature and Humanities	3-4
DLS Social Sciences course in a first field	3
DLS Social Sciences course in a second field	3
CHEM 111, 111L-112, 112L General Chemistry I & II & Labs	8
MATH 175 Calculus II	4
MATH 275 Multivariable and Vector Calculus	4
MATH 333 Differential Equations with Matrix Theory	4
One or more of the following:	3
MATH 301 Introduction to Linear Algebra	
MATH 360 Engineering Statistics	
MATH 361 Probability and Statistics I	
MATH 436 Partial Differential Equations	
MATH 462 Probability and Statistics II	
MATH 465 Numerical Analysis I	
CID PHYS 301 Analog Electronics	4
PHYS 309, 309L Introductory Modern Physics with Applications & Lab	4
PHYS 311 Modern Physics	3
PHYS 325 Scientific Computing	4
PHYS 330, 330L Optics & Lab	4
PHYS 341 Mechanics	4
PHYS 381 Electromagnetic Theory	4
PHYS 432 Thermal Physics	4
PHYS 481 Advanced Physics Lab	3
FF PHYS 499 Physics Seminar	1
<b>STEM Secondary Education</b>	
MSED 311 Perspectives on Science and Mathematics (IDoTeach)	(3)
MSED 201 Knowing and Learning (IDoTeach)	(3)
ED-CIFS 201 Foundations of Education (IDoTeach)	(3)
MSED 101 STEP 1 (IDoTeach)	1
MSED 102 STEP 2 (IDoTeach)	1
MSED 310 Classroom Interactions (IDoTeach)	3
MSED 410 Project-Based Instruction (IDoTeach)	3
MSED 480 Apprentice Teaching (IDoTeach)	6
GENSCI 3xx Research Methods (IDoTeach)	3
Electives	6-7
Total	120



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## Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education

Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Biological Sciences

## Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Biology, Secondary Education
Degree:	Bachelor of Science in Biology, Secondary Education
Method of Delivery:	Face to face
CIP code (consult IR /Registrar)	13.1322
Proposed Starting Date:	<del>Fall 2012</del> Spring 2013 PS
Indicate if the program is:	<input checked="" type="checkbox"/> <u>Regional Responsibility</u> <input type="checkbox"/> Statewide Responsibility

## Indicate whether this request is either of the following:

- |   |  |
|---|--|
| <input type="checkbox"/> New Program (minor/option/emphasis or certificate) | <input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option |
| <input type="checkbox"/> New Off-Campus Instructional Program               | <input type="checkbox"/> Consolidation of an Existing Program                    |
| <input type="checkbox"/> New Instructional/Research Unit                    | <input type="checkbox"/> Expansion of an Existing Program                        |
| <input type="checkbox"/> Contract Program/Collaborative                     | <input type="checkbox"/> Other :   |

College Dean (Institution)

Date

Vice President for Research (as applicable)

Date

Graduate Dean (as applicable)

Date

State Administrator, SDPTE (as applicable)

Date

Chief Fiscal Officer (Institution)

Date

Academic Affairs Program Manager

Date

Chief Academic Officer (Institution)

Date

Chief Academic Officer, OSBE

Date

President

Date

SBOE/OSBE Approval

Date

March 16, 2012

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**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes to discontinue the free-standing Bachelor of Science, Biology, Secondary Education degree. It will be replaced with a Bachelor of Science, Biology, emphasis in STEM secondary education. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

Students presently in the program will be accommodated: they will be able to complete the existing free-standing degree program or to switch over and enroll in the new emphasis program.

The proposed discontinuation is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*
- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*
- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*



Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

**6. Identify similar programs offered within Idaho or in the region by other colleges/universities.**

If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

**8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates		
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous
<b>BSU</b> Existing programs: BS in the following:						
Biology Secondary Ed	30	38	36	4	2	1
Chemistry Secondary Ed	8	9	5	0	0	0
Geosciences Secondary Ed	15	19	28	1	1	1
Mathematics Secondary Ed	80	86	87	18	6	15
Physics Secondary Ed	6	2	2	0	0	0
<b>CSI</b>						
<b>CWI</b>						
<b>EITC</b>						
<b>ISU</b>						
Biology Secondary Ed	20	28	NA	NA	1	0
Chemistry Secondary Ed	1	2	NA	NA	0	0
Geology Secondary Ed	5	3	NA	NA	0	1
Math Secondary Ed	31	37	NA	NA	2	1
Physics Secondary Ed	3	3	NA	NA	0	0
<b>LCSC</b> BA/BS in the following:						
Secondary Ed Biology	13	6	0	0	0	0
Secondary Ed Chemistry	1	4	1	0	0	0
Secondary Ed Earth Science	3	0	1	0	0	0
Secondary Ed Math	12	18	21	1	5	1
Secondary Ed Natural Science	7	10	11	0	0	0



NIC						
U of I						
Biology, B.S. Ed.	23	22	12	5	3	5
Chemistry, B.S. Ed.	5	6	5	3	1	0
Geological Science, B.S. Ed.	2	1	1	1	0	0
Math, B.S. Ed.	49	47	44	9	6	7
Physics, B.S. Ed.	3	2	4	0	1	1
Earth Science, B.S. Ed.	6	8	6	1	1	0

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal




**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

Students in the existing program will be advised that they have two options if they wish to continue in secondary education: they can graduate with the existing free standing degree (for up to 6 years beyond their entry into Boise State) or can switch to the new program and graduate with an emphasis in STEM education.

**16. Program Resource Requirements.** Using the **Excel spreadsheet** provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, discontinue five free-standing programs, create one certificate program, and and create five new emphases within existing programs:**

**Discontinuation of the existing free-standing program will have no impact on resources within the subject area department. All courses presently taught within the department will continue to be taught.**

**Because it is the education curriculum that will require resources and because the entire education curriculum is contained within the proposed Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13), we are placing the resource needs for the entire set of programs into this proposal. All resource needs have been consolidated in that proposal.**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

<b>I. PLANNED STUDENT ENROLLMENT</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*		
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	
A. New enrollments											
B. Shifting enrollments											
<b>II. REVENUE</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
1. Appropriated (Reallocati	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	
<i>Ongoing is defined as ongoing operating budget for the program which will become part of the base.</i>											
<i>One-time is defined as one-time funding in a fiscal year and not part of the base.</i>											
<b>III. EXPENDITURES</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
<b>A. Personnel Costs</b>											
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total FTE Personnel and Costs</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	



		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>											
1. Travel		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>											
1. Library Resources		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education

Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Chemistry

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Chemistry, Secondary Education	
Degree:	Bachelor of Science in Chemistry, Secondary Education	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.1323 (chemistry 2 <sup>nd</sup> Ed)	
Proposed Starting Date:	Fall 2012 <i>Spring 2013 PS</i>	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> <b>Statewide Responsibility</b>

### Indicate whether this request is either of the following:

<input type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :



College Dean (Institution)

7/6/12

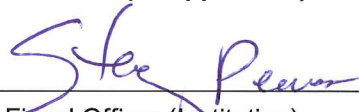
Date

Vice President for Research (as applicable)

Date

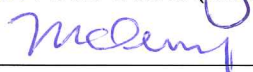
Graduate Dean (as applicable)

Date



Chief Fiscal Officer (Institution)

Date



7/9/12

Chief Academic Officer (Institution)

Date



President

Date

7/23/12

State Administrator, SDPTE (as applicable)

Date



9/13/12

Academic Affairs Program Manager

Date



9/13/12

Chief Academic Officer, OSBE

Date

SBOE/OSBE Approval

Date

March 16, 2012

Page 1



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes to discontinue the free-standing Bachelor of Science, Chemistry, Secondary Education degree. It will be replaced with a Bachelor of Science, Chemistry, emphasis in STEM secondary education. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

Students presently in the program will be accommodated: they will be able to complete the existing free-standing degree program or to switch over and enroll in the new emphasis program.

The proposed discontinuance is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*
- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*
- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*



Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

**6. Identify similar programs offered within Idaho or in the region by other colleges/universities.**

If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

**8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates		
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous
<b>BSU</b> Existing programs: BS in the following:						
Biology Secondary Ed	30	38	36	4	2	1
Chemistry Secondary Ed	8	9	5	0	0	0
Geosciences Secondary Ed	15	19	28	1	1	1
Mathematics Secondary Ed	80	86	87	18	6	15
Physics Secondary Ed	6	2	2	0	0	0
<b>CSI</b>						
<b>CWI</b>						
<b>EITC</b>						
<b>ISU</b>						
Biology Secondary Ed	20	28	NA	NA	1	0
Chemistry Secondary Ed	1	2	NA	NA	0	0
Geology Secondary Ed	5	3	NA	NA	0	1
Math Secondary Ed	31	37	NA	NA	2	1
Physics Secondary Ed	3	3	NA	NA	0	0
<b>LCSC</b> BA/BS in the following:						
Secondary Ed Biology	13	6	0	0	0	0
Secondary Ed Chemistry	1	4	1	0	0	0
Secondary Ed Earth Science	3	0	1	0	0	0
Secondary Ed Math	12	18	21	1	5	1
Secondary Ed Natural Science	7	10	11	0	0	0



NIC						
U of I						
Biology, B.S. Ed.	23	22	12	5	3	5
Chemistry, B.S. Ed.	5	6	5	3	1	0
Geological Science, B.S. Ed.	2	1	1	1	0	0
Math, B.S. Ed.	49	47	44	9	6	7
Physics, B.S. Ed.	3	2	4	0	1	1
Earth Science, B.S. Ed.	6	8	6	1	1	0

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal




**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

Students in the existing program will be advised that they have two options if they wish to continue in secondary education: they can graduate with the existing free standing degree (for up to 6 years beyond their entry into Boise State) or can switch to the new program and graduate with an emphasis in STEM education.

**16. Program Resource Requirements.** Using the **Excel spreadsheet** provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, discontinue five free-standing programs, create one certificate program, and and create five new emphases within existing programs:**

**Discontinuation of the existing free-standing program will have no impact on resources within the subject area department. All courses presently taught within the department will continue to be taught.**

**Because it is the education curriculum that will require resources and because the entire education curriculum is contained within the proposed Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13), we are placing the resource needs for the entire set of programs into this proposal. All resource needs have been consolidated in that proposal.**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

I. PLANNED STUDENT ENROLLMENT											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*		
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	
A. New enrollments											
B. Shifting enrollments											
II. REVENUE											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
1. Appropriated (Reallocated)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	
<p><i>Ongoing is defined as ongoing operating budget for the program which will become part of the base.</i></p> <p><i>One-time is defined as one-time funding in a fiscal year and not part of the base.</i></p>											
III. EXPENDITURES											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
<b>A. Personnel Costs</b>											
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total FTE Personnel and Costs</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	



		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>											
1. Travel		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>											
1. Library Resources		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education



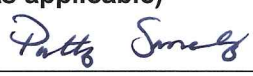
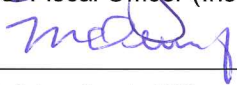

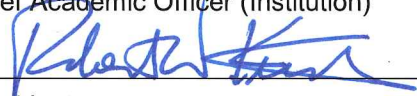
Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Geosciences

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Earth Science Education	
Degree:	Bachelor of Science in Earth Science Education	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.1316 (earth sciences 2 <sup>nd</sup> Ed)	
Proposed Starting Date:	Fall 2012 <i>Spring 2013 PS</i>	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> <b>Statewide Responsibility</b>

### Indicate whether this request is either of the following:

- |   |  |
|---|--|
| <input type="checkbox"/> New Program (minor/option/emphasis or certificate) | <input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option |
| <input type="checkbox"/> New Off-Campus Instructional Program               | <input type="checkbox"/> Consolidation of an Existing Program                    |
| <input type="checkbox"/> New Instructional/Research Unit                    | <input type="checkbox"/> Expansion of an Existing Program                        |
| <input type="checkbox"/> Contract Program/Collaborative                     | <input type="checkbox"/> Other : _____   |

 College Dean (Institution)	<i>7/6/12</i> Date	Vice President for Research (as applicable)	Date
Graduate Dean (as applicable)	Date	State Administrator, SDPTE (as applicable)	Date
 Chief Fiscal Officer (Institution)	<i>7/9/12</i> Date	 Academic Affairs Program Manager	<i>7/10/12</i> Date
 Chief Academic Officer (Institution)	<i>7/19/12</i> Date	 Chief Academic Officer, OSBE	<i>9/12/12</i> Date
 President	<i>7/23/12</i> Date	SBOE/OSBE Approval	Date

March 16, 2012

Page 1



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes to discontinue the free-standing Bachelor of Science, Earth Science Education degree. It will be replaced with a Bachelor of Science, Geology, emphasis in STEM secondary education. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

Students presently in the program will be accommodated: they will be able to complete the existing free-standing degree program or to switch over and enroll in the new emphasis program.

The proposed discontinuation is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*
- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*
- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*



Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

**6. Identify similar programs offered within Idaho or in the region by other colleges/universities.**

If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

**8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates		
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous
<b>BSU</b> Existing programs: BS in the following:						
Biology Secondary Ed	30	38	36	4	2	1
Chemistry Secondary Ed	8	9	5	0	0	0
Geosciences Secondary Ed	15	19	28	1	1	1
Mathematics Secondary Ed	80	86	87	18	6	15
Physics Secondary Ed	6	2	2	0	0	0
<b>CSI</b>						
<b>CWI</b>						
<b>EITC</b>						
<b>ISU</b>						
Biology Secondary Ed	20	28	NA	NA	1	0
Chemistry Secondary Ed	1	2	NA	NA	0	0
Geology Secondary Ed	5	3	NA	NA	0	1
Math Secondary Ed	31	37	NA	NA	2	1
Physics Secondary Ed	3	3	NA	NA	0	0
<b>LCSC</b> BA/BS in the following:						
Secondary Ed Biology	13	6	0	0	0	0
Secondary Ed Chemistry	1	4	1	0	0	0
Secondary Ed Earth Science	3	0	1	0	0	0
Secondary Ed Math	12	18	21	1	5	1
Secondary Ed Natural Science	7	10	11	0	0	0



NIC						
U of I						
Biology, B.S. Ed.	23	22	12	5	3	5
Chemistry, B.S. Ed.	5	6	5	3	1	0
Geological Science, B.S. Ed.	2	1	1	1	0	0
Math, B.S. Ed.	49	47	44	9	6	7
Physics, B.S. Ed.	3	2	4	0	1	1
Earth Science, B.S. Ed.	6	8	6	1	1	0

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal




**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

Students in the existing program will be advised that they have two options if they wish to continue in secondary education: they can graduate with the existing free standing degree (for up to 6 years beyond their entry into Boise State) or can switch to the new program and graduate with an emphasis in STEM education.

**16. Program Resource Requirements.** Using the **Excel spreadsheet** provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, discontinue five free-standing programs, create one certificate program, and and create five new emphases within existing programs:**

**Discontinuation of the existing free-standing program will have no impact on resources within the subject area department. All courses presently taught within the department will continue to be taught.**

**Because it is the education curriculum that will require resources and because the entire education curriculum is contained within the proposed Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13), we are placing the resource needs for the entire set of programs into this proposal. All resource needs have been consolidated in that proposal.**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

<b>I. PLANNED STUDENT ENROLLMENT</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*		
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	
A. New enrollments											
B. Shifting enrollments											
<b>II. REVENUE</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
1. Appropriated (Reallocati	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	
<i>Ongoing is defined as ongoing operating budget for the program which will become part of the base.</i>											
<i>One-time is defined as one-time funding in a fiscal year and not part of the base.</i>											
<b>III. EXPENDITURES</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
<b>A. Personnel Costs</b>											
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total FTE Personnel and Costs</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	



		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>											
1. Travel		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>											
1. Library Resources		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education


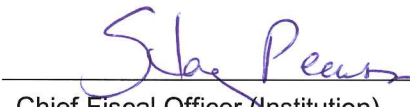
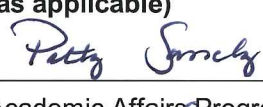
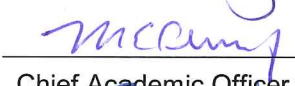

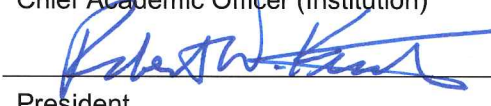
Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Mathematics

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Mathematics, Secondary Education	
Degree:	Bachelor of Science in Mathematics, Secondary Education	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.1311 (math)	
Proposed Starting Date:	Fall 2012 <i>Spring 2013 ps</i>	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> <b>Statewide Responsibility</b>

### Indicate whether this request is either of the following:

<input type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other : _____

 College Dean (Institution)	<i>7/6/12</i> Date	Vice President for Research (as applicable)	Date
Graduate Dean (as applicable)	Date	State Administrator, SDPTE (as applicable)	Date
 Chief Fiscal Officer (Institution)	<i>7/9/12</i> Date	 Academic Affairs Program Manager	<i>9/18/12</i> Date
 Chief Academic Officer (Institution)	<i>7/9/12</i> Date	 Chief Academic Officer, OSBE	<i>9/13/12</i> Date
 President	<i>7/23/12</i> Date	SBOE/OSBE Approval	Date

March 16, 2012

Page 1



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes to discontinue the free-standing Bachelor of Science, Mathematics, Secondary Education degree. It will be replaced with a Bachelor of Science, Mathematics, emphasis in STEM secondary education. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

Students presently in the program will be accommodated: they will be able to complete the existing free-standing degree program or to switch over and enroll in the new emphasis program.

The proposed discontinuation is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*
- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*
- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*



Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

**6. Identify similar programs offered within Idaho or in the region by other colleges/universities.**

If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

**8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates		
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous
<b>BSU</b> Existing programs: BS in the following:						
Biology Secondary Ed	30	38	36	4	2	1
Chemistry Secondary Ed	8	9	5	0	0	0
Geosciences Secondary Ed	15	19	28	1	1	1
Mathematics Secondary Ed	80	86	87	18	6	15
Physics Secondary Ed	6	2	2	0	0	0
<b>CSI</b>						
<b>CWI</b>						
<b>EITC</b>						
<b>ISU</b>						
Biology Secondary Ed	20	28	NA	NA	1	0
Chemistry Secondary Ed	1	2	NA	NA	0	0
Geology Secondary Ed	5	3	NA	NA	0	1
Math Secondary Ed	31	37	NA	NA	2	1
Physics Secondary Ed	3	3	NA	NA	0	0
<b>LCSC</b> BA/BS in the following:						
Secondary Ed Biology	13	6	0	0	0	0
Secondary Ed Chemistry	1	4	1	0	0	0
Secondary Ed Earth Science	3	0	1	0	0	0
Secondary Ed Math	12	18	21	1	5	1
Secondary Ed Natural Science	7	10	11	0	0	0



NIC						
U of I						
Biology, B.S. Ed.	23	22	12	5	3	5
Chemistry, B.S. Ed.	5	6	5	3	1	0
Geological Science, B.S. Ed.	2	1	1	1	0	0
Math, B.S. Ed.	49	47	44	9	6	7
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Earth Science, B.S. Ed.	6	8	6	1	1	0

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal




**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

Students in the existing program will be advised that they have two options if they wish to continue in secondary education: they can graduate with the existing free standing degree (for up to 6 years beyond their entry into Boise State) or can switch to the new program and graduate with an emphasis in STEM education.

**16. Program Resource Requirements.** Using the **Excel spreadsheet** provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, discontinue five free-standing programs, create one certificate program, and and create five new emphases within existing programs:**

**Discontinuation of the existing free-standing program will have no impact on resources within the subject area department. All courses presently taught within the department will continue to be taught.**

**Because it is the education curriculum that will require resources and because the entire education curriculum is contained within the proposed Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13), we are placing the resource needs for the entire set of programs into this proposal. All resource needs have been consolidated in that proposal.**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

### I. PLANNED STUDENT ENROLLMENT

		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*	
		FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments											
B. Shifting enrollments											

### II. REVENUE

		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. Appropriated (Reallocation)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Appropriated (New)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Federal		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Tuition		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Student Fees		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Other (Specify)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0

*Ongoing is defined as ongoing operating budget for the program which will become part of the base.*

*One-time is defined as one-time funding in a fiscal year and not part of the base.*

### III. EXPENDITURES

		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
A. Personnel Costs											
1. FTE		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
2. Faculty		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Administrators		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Adjunct Faculty		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Instructional Assistants		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Research Personnel		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Support Personnel		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Fringe Benefits		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Other:		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total FTE Personnel and Costs		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>											
1. Travel		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>											
1. Library Resources		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



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# Idaho State Board of Education

## Proposal for Other Academic Program Activity and Professional-Technical Education


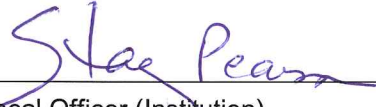



Date of Proposal Submission:	June 1, 2012
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Arts and Sciences
Name of Department(s) or Area(s):	Department of Physics

### Program Identification for Proposed New, Modified, or Discontinued Program:

Title:	Physics, Secondary Education	
Degree:	Bachelor of Science in Physics, Secondary Education	
Method of Delivery:	Face to face	
CIP code (consult IR /Registrar)	13.1329 (physics 2 <sup>nd</sup> Ed)	
Proposed Starting Date:	Fall 2012 <i>Spring 2013 ?</i>	
Indicate if the program is:	<input checked="" type="checkbox"/> <b>Regional Responsibility</b>	<input type="checkbox"/> <b>Statewide Responsibility</b>

### Indicate whether this request is either of the following:

<input type="checkbox"/> New Program (minor/option/emphasis or certificate)	<input checked="" type="checkbox"/> Discontinuance of an Existing Program/Option
<input type="checkbox"/> New Off-Campus Instructional Program	<input type="checkbox"/> Consolidation of an Existing Program
<input type="checkbox"/> New Instructional/Research Unit	<input type="checkbox"/> Expansion of an Existing Program
<input type="checkbox"/> Contract Program/Collaborative	<input type="checkbox"/> Other :

 College Dean (Institution)	<i>7/6/12</i> Date	 Vice President for Research (as applicable)	 Date
 Graduate Dean (as applicable)	 Date	 State Administrator, SDPTE (as applicable)	 Date
 Chief Fiscal Officer (Institution)	<i>7/9/12</i> Date	 Academic Affairs Program Manager	<i>7/13/12</i> Date
 Chief Academic Officer (Institution)	<i>7/9/12</i> Date	 Chief Academic Officer, OSBE	<i>7/18/12</i> Date
 President	<i>7/23/12</i> Date	 SBOE/OSBE Approval	 Date

March 16, 2012

Page 1



**Before completing this form, refer to Board Policy Section III.G., Program Approval and Discontinuance.** This proposal form must be completed for the creation of each new program and each program discontinuance. All questions must be answered.

- 1. Describe the nature of the request.** Will this program/option be related or tied to other programs on campus? Please identify any existing program, option that this program will replace. *If this is request to discontinue an existing program, provide the rationale for the discontinuance. Indicate the year and semester in which the last cohort of students was admitted and the final term the college will offer the program. Describe the teach-out plans for continuing students.*

Boise State University proposes to discontinue the free-standing Bachelor of Science, Physics, Secondary Education degree. It will be replaced with a Bachelor of Science, Physics, emphasis in STEM secondary education. The creation of an emphasis (as opposed to a free-standing program) reflects the focus on integration of educational pedagogy into subject area courses and vice versa.

Students presently in the program will be accommodated: they will be able to complete the existing free-standing degree program or to switch over and enroll in the new emphasis program.

The proposed discontinuation is part of a larger plan to completely revise the teaching of science and mathematics secondary education at Boise State. Presently, there are five free-standing degree programs in math/science in secondary education: BS in Biology, Secondary Education; BS in Chemistry, Secondary Education; BS in Earth Sciences, Secondary Education; BS in Mathematics, Secondary Education; and BS in Physics Secondary Education. All five of those programs are being discontinued (see proposals #12-08 through #12-12). They will be replaced by (i) an undergraduate certificate in STEM Secondary Education Certification (Proposal #12-13) and (ii) an emphasis area within the BS degrees in mathematics and each of the sciences (e.g., BS in Biology, emphasis in STEM Secondary Education) (proposals 12-14 through 12-18).

The proposed set of changes replicates the UTeach teacher preparation program out of the University of Texas. The UTeach program has become a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The UTeach program has been in existence for over 10 years.

- 2. List the objectives of the program.** The objectives should address specific needs (industry) the program will meet. They should also identify the expected student learning outcomes and achievements. *This question is not applicable to requests for discontinuance.*
- 3. Briefly describe how the institution will ensure the quality of the program** (i.e., program review). Will the program require specialized accreditation (it is not necessary to address regional accreditation)? If so, please identify the agency and explain why you do or do not plan to seek accreditation. *This question is not applicable to requests for discontinuance.*
- 4. List new courses that will be added to curriculum specific for this program.** Indicate number, title, and credit hour value for each course. Please include course descriptions for new and/or changes to courses. ***Attach a Scope and Sequence, SDPTE Form Attachment B, for professional-technical education requests.*** *This question is not applicable to requests for discontinuance.*
- 5. Please provide the program completion requirements and attach to this proposal as Appendix A.** *This question is not applicable to requests for discontinuance.*



Credit hours required in major:	
Credit hours required in minor:	
Credit hours in institutional general education or core curriculum:	
Credit hours in required electives:	
<b>Total credit hours required for completion:</b>	

**6. Identify similar programs offered within Idaho or in the region by other colleges/universities.**

If the proposed request is similar to another state program, provide a rationale for the duplication. Institutions do not need to complete this section for PTE programs. This question is not applicable to requests for discontinuance.

**7. Describe the methodology for determining enrollment projections.** If a survey of student interest was conducted, attach a copy of the survey instrument with a summary of results as **Appendix B**. *This question is not applicable to requests for discontinuance.*

**8. Enrollment and Graduates.** Provide a realistic estimate of enrollment at the time of program implementation and over three year period based on availability of students meeting the criteria referenced above. Include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed program, last three years beginning with the current year and the previous two years. Also, indicate the number of graduates and graduation rates.

**Discontinuations.** Using the chart below include part-time and full-time (i.e., number of majors or other relevant data) by institution for the proposed discontinuation, last three years beginning with the current year and previous two years. Indicate how many students are currently enrolled in the program for the previous two years to include number of graduates and graduation rates.

Institution	Relevant Enrollment Data			Number of Graduates		
	Current	Year 1 Previous	Year 2 Previous	Current	Year 1 Previous	Year 2 Previous
<b>BSU</b> Existing programs: BS in the following:						
Biology Secondary Ed	30	38	36	4	2	1
Chemistry Secondary Ed	8	9	5	0	0	0
Geosciences Secondary Ed	15	19	28	1	1	1
Mathematics Secondary Ed	80	86	87	18	6	15
Physics Secondary Ed	6	2	2	0	0	0
<b>CSI</b>						
<b>CWI</b>						
<b>EITC</b>						
<b>ISU</b>						
Biology Secondary Ed	20	28	NA	NA	1	0
Chemistry Secondary Ed	1	2	NA	NA	0	0
Geology Secondary Ed	5	3	NA	NA	0	1
Math Secondary Ed	31	37	NA	NA	2	1
Physics Secondary Ed	3	3	NA	NA	0	0
<b>LCSC</b> BA/BS in the following:						
Secondary Ed Biology	13	6	0	0	0	0
Secondary Ed Chemistry	1	4	1	0	0	0
Secondary Ed Earth Science	3	0	1	0	0	0
Secondary Ed Math	12	18	21	1	5	1
Secondary Ed Natural Science	7	10	11	0	0	0



NIC						
U of I						
Biology, B.S. Ed.	23	22	12	5	3	5
Chemistry, B.S. Ed.	5	6	5	3	1	0
Geological Science, B.S. Ed.	2	1	1	1	0	0
Math, B.S. Ed.	49	47	44	9	6	7
Physics, B.S. Ed.	3	2	4	0	1	1
Earth Science, B.S. Ed.	6	8	6	1	1	0

9. Will this program reduce enrollments in other programs at your institution? If so, please explain.

10. Provide verification of state workforce needs such as job titles requiring this degree. Include State and National Department of Labor research on employment potential. *This question is not applicable to requests for discontinuance.*

Using the chart below, indicate the total projected job openings (including growth and replacement demands in your regional area, the state, and nation. Job openings should represent positions which require graduation from a program such as the one proposed. Data should be derived from a source that can be validated and must be no more than two years old. *This question is not applicable to requests for discontinuance.*

	Year 1	Year 2	Year 3	Total
Region				
State				
Nation				

a. Describe the methodology used to determine the projected job openings. If a survey of employment needs was used, please attach a copy of the survey instrument with a summary of results as **Appendix C**.

b. Describe how the proposed change will act to stimulate the state economy by advancing the field, providing research results, etc.

c. Is the program primarily intended to meet needs other than employment needs, if so, please provide a brief rationale.

11. Will any type of distance education technology be utilized in the delivery of the program on your main campus or to remote sites? Please describe. *This question is not applicable to requests for discontinuance.*

12. Describe how this request is consistent with the State Board of Education's strategic plan and institution's role and mission. *This question is not applicable to requests for discontinuance.*

13. Describe how this request fits with the institution's vision and/or strategic plan. *This question is not applicable to requests for discontinuance.*

Goals of Institution Strategic Mission	Proposed Program Plans to Achieve the Goal




**14. Is the proposed program in your institution's Five-Year plan? Indicate below.** *This question is not applicable to requests for discontinuance.*

Yes \_\_\_\_ No \_\_\_\_

If not on your institution's Five-Year plan, provide a justification for adding the program.

**15. Explain how students are going to learn about this program and where students are going to be recruited from (i.e., within institution, out-of-state, internationally).** *For request to discontinue program, how will continuing students be advised of impending changes and consulted about options or alternatives for attaining their educational goals?*

Students in the existing program will be advised that they have two options if they wish to continue in secondary education: they can graduate with the existing free standing degree (for up to 6 years beyond their entry into Boise State) or can switch to the new program and graduate with an emphasis in STEM education.

**16. Program Resource Requirements.** Using the **Excel spreadsheet** provided by the Office of the State Board of Education, provide a realistic estimate of costs needed for the overall program. This should only include the additional costs that will be incurred and not current costs. Include both the reallocation of existing resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

**Please note: This proposal is part of a package of proposals that, together, discontinue five free-standing programs, create one certificate program, and and create five new emphases within existing programs:**

**Discontinuation of the existing free-standing program will have no impact on resources within the subject area department. All courses presently taught within the department will continue to be taught.**

**Because it is the education curriculum that will require resources and because the entire education curriculum is contained within the proposed Undergraduate Certificate in IDoTeach STEM Teacher Certification (Proposal 12-13), we are placing the resource needs for the entire set of programs into this proposal. All resource needs have been consolidated in that proposal.**



**Program Resource Requirements.** Indicate all resources needed including the planned FTE enrollment, projected revenues, and estimated expenditures for the first three fiscal years of the program. Include reallocation of existing personnel and resources and anticipated or requested new resources. Second and third year estimates should be in constant dollars. Amounts should reconcile subsequent pages where budget explanations are provided. If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies). Provide an explanation of the fiscal impact of the proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

<b>I. PLANNED STUDENT ENROLLMENT</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16*	4 year Cumulative Total*		
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount	
A. New enrollments											
B. Shifting enrollments											
<b>II. REVENUE</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
1. Appropriated (Reallocated)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
2. Appropriated (New)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Federal	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Student Fees	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Other (Specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total Revenue</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	
<i>Ongoing is defined as ongoing operating budget for the program which will become part of the base.</i>											
<i>One-time is defined as one-time funding in a fiscal year and not part of the base.</i>											
<b>III. EXPENDITURES</b>											
	FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*		
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	
<b>A. Personnel Costs</b>											
1. FTE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
2. Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
3. Administrators	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
4. Adjunct Faculty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
5. Instructional Assistants	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
6. Research Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
7. Support Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
8. Fringe Benefits	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
9. Other:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Total FTE Personnel and Costs</b>	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0	



		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>B. Operating Expenditure</b>											
1. Travel		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Professional Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3. Other Services		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4. Communications		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Utilities		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Materials and Supplies		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7. Rentals		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8. Repairs & Maintenance		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9. Materials & Goods for Manufacture & Resale		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10. Miscellaneous		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operating Expenditures</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
		FY	2012-13	FY	2013-14	FY	2014-15	FY	2015-16	4 year Cumulative Total*	
		On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
<b>C. Capital Outlay</b>											
1. Library Resources		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2. Equipment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Capital Outlay</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0
<b>D. Capital Facilities Construction or Major Renovation</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>E. Indirect Costs (overhead)</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>TOTAL EXPENDITURES:</b>		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Net Income (Deficit)</b>		\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00	\$0	\$0



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## **UTeach Institute Support for Program Implementation**

### **Statement of Work for multi-year implementation support**

Purpose: To provide comprehensive support to Universities to implement UTeach.

#### **Planning Year Deliverables:**

- Kickoff meeting for new replication sites
- 2-day site visit to University
- Attendance at instructional support events including workshops and retreats
- Direct technical assistance to University staff and faculty as they implement the program
- Attendance at UTeach Institute Annual Conference
- Reports to universities and funders
- Release of curriculum and support materials to universities and license to use these materials during the planning period, subject to the UTeach Materials License agreement

**Period of performance: September 1, 2011 – August 31, 2012**

**Amount due for Planning Period: \$100,000**

\$90,000 to be made in quarterly installments beginning on first day of Planning Year

\$10,000 materials license fee due on first day of Planning Year

#### **Implementation Year 1 Deliverables:**

- Fall semester site visit to University
- Spring semester site visit to University
- Attendance at instructional support events including workshops and retreats
- Direct technical assistance to University staff and faculty as they implement the program
- Attendance at UTeach Institute Annual Conference
- Reports to University and funders
- Release of curriculum and support materials to universities and license to use these materials during Implementation Year 1, subject to the UTeach Materials License agreement

**Period of performance: September 1, 2012 – August 31, 2013**

**Amount due for Implementation Year 1: \$100,000**

\$90,000 to be made in quarterly installments beginning on first day of Implementation Year 1

\$10,000 materials license fee due on first day of Implementation Year 1

#### **Implementation Year 2 Deliverables:**





## **UTeach Institute Support for Program Implementation**

### **Statement of Work for multi-year implementation support**

- Fall semester site visit to University
- Spring semester site visit to University
- Attendance at instructional support events including workshops and retreats
- Direct technical assistance to University staff and faculty as they implement the program
- Attendance at UTeach Institute Annual Conference
- Reports to University and funders
- Release of curriculum and support materials to universities and license to use these materials during Implementation Year 2, subject to the UTeach Materials License agreement

**Period of performance: September 1, 2013 – August 31, 2014**

#### **Amount due for Implementation Year 2: \$100,000**

\$90,000 to be made in quarterly installments beginning on first day of Implementation Year 2  
 \$10,000 materials license fee due on first day of Implementation Year 2

#### **Implementation Year 3 Deliverables:**

- Fall semester site visit to University
- Spring semester site visit to University
- Attendance at instructional support events including workshops and retreats
- Direct technical assistance to University staff and faculty as they implement the program
- Attendance at UTeach Institute Annual Conference
- Reports to University and funders
- Release of curriculum and support materials to universities and license to use these materials during Implementation Year 3, subject to the UTeach Materials License agreement

**Period of performance: September 1, 2014 – August 31, 2015**

#### **Amount due for Implementation Year 3: \$100,000**

\$90,000 to be made in quarterly installments beginning on first day of Implementation Year 3  
 \$10,000 materials license fee due on first day of Implementation Year 3

#### **Implementation Year 4 Deliverables:**

- Fall semester site visit to University
- Spring semester site visit to University
- Attendance at instructional support events including workshops and retreats
- Direct technical assistance to University staff and faculty as they implement the program





## **UTeach Institute Support for Program Implementation**

### **Statement of Work for multi-year implementation support**

- University attendance at UTeach Institute Annual Conference
- Reports to University and University funders
- Release of curriculum and support materials to University and license to use these materials during Implementation Year 4, subject to the UTeach Materials License agreement

**Period of performance: September 1, 2015 – August 31, 2016**

**Amount due for Implementation Year 4: \$100,000**

\$90,000 to be made in quarterly installments beginning on first day of Implementation Year 4

\$10,000 materials license fee due on first day of Implementation Year 4



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**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS**  
**OCTOBER 18, 2012**

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**SUBJECT**

Board Policy III.V. Statewide Articulation and Associate Degree and Board Policy III.N. Private, In-state, Out-of-state – First Reading

**REFERENCE**

August 2011	The Board approved the second reading of III.V.
June 2011	The Board approved the first reading of III.V.
June 2007	The Board reviewed amendments to Board Policy III.N. The Board did not approve the changes.
September 2000	The Board approved the second reading of III.N.
June 2000	The Board approved the first reading of III.N.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section III.V. Statewide Articulation and Associate Degree  
Idaho State Board of Education Governing Policies & Procedures, Section III.N, Private, In-state, Out-of-State, Non-Accredited Institutions, and Other Educational Source Offerings  
Section 33-107(6), Idaho Code

**BACKGROUND/DISCUSSION**

Board Policy III.V, Statewide Articulation and Associate Degree provides for the facilitation of credit transfer and also includes the Board's general education core requirements.

With increasing demand for accountability and concerns regarding alignment and transfer in an ever-changing world, the Council for Academic Affairs and Programs (CAAP) commissioned a group of key educational leaders from all eight public institutions and charged them with evaluating the Leveraging Educational Assistance Partnership (LEAP) Program framework, and to address concerns regarding transferability due to the changes in delivery of general education studies at Boise State University (BSU) and the University of Idaho (UI).

Amendments to Board Policy III.V are being proposed to allow flexibility in the six credits required of the general education core that are not assigned to a specific discipline. These changes will allow for flexibility as the State General Education Core Reform Taskforce looks at general education with new approaches to program design and assessment that address the needs of other stakeholders. General education reform work requires a faculty-driven process that identifies an explicit core of learning outcomes within shared, discipline-specific competency areas. Transferability across institutions is central to general



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
OCTOBER 18, 2012**

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education reform and the establishment of common learning outcomes and competencies. The ability to map and assess learning outcomes and competencies across institutions will play a key role in general education reform. Because BSU and the UI have already begun campus-level general education reform, the modifications to Policy III.V. will allow for ease of transfer across public institutions as the State General Education Reform Taskforce continues its analysis and development of a recommended framework. The work will begin with a focus on the core of general education as that is the foundation for all degrees. It is expected that when a new framework is developed, the taskforce will bring forward their recommendations to the Board for approval, which would result in further changes to Board Policy III.V.

Changes to this policy also include incorporating sections of Board Policy III.N regarding the acceptance of credit from registered postsecondary educational institutions and proprietary schools.

Board Policy III.N. Private, In-State, Non-Accredited Institution, and Other Educational Source Offerings sets out the registration requirements for proprietary schools and postsecondary educational institutions who wish to offer courses, courses of study or degree's within the state and touches on how public postsecondary institutions should treat credit transfer from these schools and institutions. Chapter 24, Title 33, Idaho code sets out the registration requirements for proprietary schools and postsecondary educational institutions and establishes the Board's authority to manage registration. Additional clarifying procedures regarding the registration process are outlined in IDAPA 08.01.11. There have been a number of changes to Idaho Code and the rules since April of 2002 when III.N. was last updated. Additionally, the Board's authority over institutions not under its governance or oversight are regulated through Idaho code and IDAPA rule and those entities the Board have governance over are regulated through Board policy. As such Board Policy is no longer in compliance with Idaho code or IDAPA rule and is redundant to the regulations set out within them. As such Board Policy III.N. should be repealed in its entirety. The language within the policy that touches on the transfer of credits to our public postsecondary institutions is being moved to III.V., Articulation and Transfer (previously titled Articulation and Associate Degree Policy).

## **IMPACT**

Amendments to Board Policy III.V allow for flexibility as the State General Education Core Reform Taskforce looks at general education with new approaches to program design and assessment. Changes also include the incorporation of transfer language that was previously included in III.N.

## **ATTACHMENTS**

Attachment 1 – Board Policy III.N., Private, In-state, Out-of-state,  
Non-Accredited Institution and Other Educational  
Source Offerings Proposed Amendments

Page 5



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
OCTOBER 18, 2012**

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Attachment 2 - Board Policy III.V., Statewide Articulation  
and Associate Degree Proposed Amendments

Page 11

**STAFF COMMENTS AND RECOMMENDATIONS**

Amendments to Board Policy III.V will allow for flexibility with current practice, and allow the Taskforce to continue its work with the general education reform initiative. Staff would like to point out that as the Taskforce formalizes their recommendations, additional amendments will be proposed for Policy III.V. for the Board's consideration.

Board staff recommends approval of both policies as presented.

**BOARD ACTION**

I move to approve the first reading of amendments to Board Policy III.N. Private, In-state, Out-of-state, Non-Accredited Institution and Other Educational Source Offerings as presented.

AND

I move to approve the first reading of the amendments to Board Policy III. V. Statewide Articulation and Associate Degree as presented.

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



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**GOVERNING POLICIES AND PROCEDURES****SECTION: III. POSTSECONDARY AFFAIRS****N. Private In-State, Out-of-State, Non-Accredited Institutions, and other Educational Source Offerings**

April 2002

**1. Statutory Authority**

~~Section 33-107(6), Idaho Code, establishes as a general power and duty of the Board the maintenance of a register of courses and programs offered anywhere in the state of Idaho by postsecondary institutions that are: a.) located outside the state and are offering courses or programs for academic credit or otherwise; or b.) located within the state of Idaho but not accredited by a regional or national accrediting agency recognized by the Board and are offering courses for academic credit. The acceptance of academic or non-academic credit at public postsecondary institutions in Idaho is the prerogative of the Board. In addition, Chapter 24, Title 33, Idaho Code, establishes requirements for registration, agent's permit, purchase statement, surety bond and student tuition recovery account.~~

**2. Register of Accredited In-State and Out-of-State Institutions****a. Maintenance of Register**

~~A register of courses and programs is maintained at the Office of the State Board of Education. The Office will establish written procedures, available upon request, for compliance with the requirements of Section 33-107(6), Idaho Code. Accredited institutions are exempt from Chapter 24, Title 33, Idaho Code.~~

**b. In-State Accredited Institutions**~~—(1) Regional Accreditation Bodies (III.M. – Accreditation)~~

~~—An in-state institution (i.e., is physically located in Idaho) accredited by one of the six (6) regional accreditation agencies (see Section III, Subsection M) is exempt from registering with the Office of the State Board of Education. Furthermore, credits awarded by one of the six regional accreditation agencies will be accepted by the State Board of Education and transferable into Idaho's public postsecondary system.~~

~~(2) Non-Regional Accreditation Agencies~~

~~The State Board of Education also recognizes those national accreditation agencies approved by the U.S. Department of Education.~~

~~Private in-state institution(s) that are accredited by one (1) of these national accreditation bodies are exempt from registering with the Office of the State Board of Education. However, the acceptance of programs and/or credits is not assured. Those institutions that wish to have their programs and/or credits accepted that the Board, and hence, the public colleges and universities, must forward an application to the Office of the State Board of Education.~~



**GOVERNING POLICIES AND PROCEDURES****SECTION: III. POSTSECONDARY AFFAIRS****N. Private In-State, Out-of-State, Non-Accredited Institutions, and other Educational Source Offerings****April 2002**

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~~The Board's Instruction, Research and Student Affairs Committee or its designee will evaluate the application submitted by private, in-state, non-regionally accredited institutions. The evaluation will follow the identical standards by which the State Board of Education evaluates its own public postsecondary institutions. Should the program(s) or course(s) be evaluated as comparable to a program(s) or course(s) offered by an Idaho public institution, it will be accepted by the State Board of Education and hence transferable into the public postsecondary system. Those program(s) and course(s) that are not comparable will not be accepted by the State Board of Education and will not transfer to those institutions under their governance.~~

~~The State Board of Education, through its IRSAC, shall set program and course evaluation fees, and any impact fees.~~

~~c. Out-of-State Accredited Institutions~~

~~A registration form/application must be submitted by any Board recognized accredited out-of-state institution to the State Board of Education. Critical evaluation of each of the components of such offerings as compared with courses, programs, credit awarded, and faculty of postsecondary institutions under governance of the Board will be accomplished by the Board's Instruction, Research and Student Affairs Committee or its designee. Should the course be evaluated as comparable to a course offered by an Idaho institution, it will be designated as "comparable" on the registration form; should the course not be comparable, it will be designated as "not comparable" on the form. Any interested person who makes inquiry concerning such course will be told whether the course is comparable or not comparable to offerings available from Idaho institutions.~~

~~Academic credit for courses evaluated as not comparable shall not be accepted by Idaho postsecondary institutions under the direction and control of the Board. Courses or programs evaluated as comparable will be accepted for academic credit by Idaho's public postsecondary institutions and thus shall be fully transferable among the institutions.~~

~~The State Board of Education, through its Instruction, Research and Student Affairs Committee, shall set course and program processing fees, an impact fee, and a registration fee.~~

~~3. Register of Non-accredited Institutions and Other Educational Source Offerings~~

~~a. Statutory Authority~~



**GOVERNING POLICIES AND PROCEDURES****SECTION: III. POSTSECONDARY AFFAIRS****N. Private In-State, Out-of-State, Non-Accredited Institutions, and other Educational Source Offerings****April 2002**

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- ~~— In addition to the powers conferred by Chapter 24, Title 33, Idaho Code, Section 33-107(6) requires the Board to maintain a register of institutions and their courses to be offered anywhere in the state of Idaho by postsecondary institutions which are located outside or within the state of Idaho but not accredited by a regional or national accrediting agency recognized by the Board. Idaho statute does not permit the offering of programs (i.e., degrees) in Idaho by non-accredited institutions. The acceptance of academic and non-academic credit, at public postsecondary institutions in Idaho, is the prerogative of the State Board of Education.~~
- ~~— b. Registration without Acceptance of Credit~~
- ~~— All trade, correspondence, technical vocational or other schools with a physical presence in Idaho and not accredited by an accrediting agency recognized by the Board must register with the Board. In addition to the requirements of Chapter 24, Title 33, Idaho Code, the registration will include:~~
- ~~(1) The applying institution shall provide the following: (a) a current financial statement with an opinion audit prepared by a certified public accountant; (b) a description of instructional methods used by the institution including mission statements, methods for assigning, monitoring and evaluating work, design of curriculum, and awarding credit; and (c) submission of credentials for faculty, including the submission of official copies of academic transcripts, verification of educational degrees attained and description of courses taught by that individual.~~
  - ~~(2) Restrictions against an institution's awarding credit, earned or honorary, primarily on the basis of: (a) payment of tuition or a fee, (b) credit earned at another school, (c) credit for life experience or other equivalency, (d) testing out of required course work, (e) research and writing, or (f) any combination of the foregoing.~~
  - ~~(3) Performance/Surety Bond: The performance/surety bond, based upon Idaho student enrollment will be as follows:~~
    - ~~• \$25,000 -- less than 50 students;~~
    - ~~• \$50,000 -- 50 to 99 students; or~~
    - ~~• \$100,000 -- 100 or more students~~
- ~~Chapter 24, Title 33, Idaho Code provides for an exemption for those applicants who can demonstrate through such means as a CPA audit that the institution's annual tuition received is less than \$10,000 per year. In that case, the performance/surety bond will be \$10,000 per year.~~



**GOVERNING POLICIES AND PROCEDURES****SECTION: III. POSTSECONDARY AFFAIRS****N. Private In-State, Out-of-State, Non-Accredited Institutions, and other Educational Source Offerings****April 2002**

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**c. Registration with Acceptance of Credit**

~~A non-accredited in-state or out-of-state institution or educational source with a physical presence in Idaho desiring to have its academic or non-academic courses accepted by the Board and the Idaho public postsecondary institutions, must submit each course or workshop request to be offered in Idaho to the Board's Academic Affairs and Program Committee for critical evaluation and review. The AAPC shall establish an evaluation and review process in compliance with Section 33-107(6), Idaho Code, Chapter 24, Title 33, Idaho Code and the AAPC Guidelines for Program Review and Approval. The registration will include:~~

~~(1) On-site visit requirements (in-state campus, and/or out-of-state home (main) campus or sending site) not less than once every five (5) years. The on-site visitation shall be conducted by a representative of the State Board of Education (SBOE) and may occur more frequently at the Board's discretion. The registered institution is required to pay the costs of the inspection and visitation by Idaho authorities.~~

~~(2) Should the course or workshop be evaluated as acceptable or comparable to a course or workshop offered by an Idaho institution, it will be accepted for academic or non-academic credit by the SBOE and thus be accepted by the public postsecondary institutions in Idaho.~~

~~(3) Academic or non-academic credit evaluated as non-acceptable or not comparable shall not be accepted by Idaho's public postsecondary institutions.~~

~~(4) Course or workshop fees for the evaluation, processing, registration, and impact will be set by the Board through its Academic Affairs and Program Committee and established in Administrative Rules.~~

**4. Referral to the Attorney General**

~~Section 33-107(6), Idaho Code, requires establishment of criteria consistent with generally accepted professional standards relating to use of false or misleading advertising, solicitations, or false promises of employment. The Academic Affairs and Program Committee evaluates each registration of an out-of-state institution or an in-state non-accredited institution for compliance with such generally accepted standards and submits to the Board a recommendation that the office of the attorney general be notified of any violation. The Board itself must forward any such requests for action on violations to the office of the attorney general.~~



**GOVERNING POLICIES AND PROCEDURES****SECTION: III. POSTSECONDARY AFFAIRS****N. Private In-State, Out-of-State, Non-Accredited Institutions, and other Educational Source Offerings****April 2002**

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**5. Interpretations**

- ~~— a. Non-credit or continuing education courses are subject to compliance with Section 33-107(6), Idaho Code, if offered in Idaho by an accredited out-of-state institution or an in-state or out-of-state non-accredited institution.~~
- ~~— b. Accredited out-of-state institutions and non-accredited institutions, either in-state or out-of-state, or their agents or representatives, are exempt from compliance with Section 33-107 (6), Idaho Code, if the courses or programs are offered at a U.S. military installation solely for military personnel.~~
- ~~c. For purposes of this policy, a non-accredited postsecondary institution or educational source shall be deemed to have a physical presence in Idaho if it owns, rents, leases, or uses any office or other physical location in Idaho from which it, or its representatives sells, offers for sale, or distributes any course or courses for academic credit or otherwise.~~
- ~~d. Academic credits from in-state accredited institutions will be accepted within Idaho's higher education system with the exception of religious, a vocational or recreational, private vocational courses sponsored by an employer for the training or preparation of its own employees, and aviation schools/instructors under the supervision of the federal aviation administration. Further, intensive review courses designed to prepare students for certified public accountancy tests, law school aptitude tests, bar examinations, graduate record exams, or medical admission tests will be exempt in accordance with Section 33-2402, Idaho Code.~~
- ~~— e. Authority is delegated to the postsecondary institutions under the Board's governance to evaluate and accept credits on behalf of transferring students who have earned those credits from any out-of-state accredited institution or from any non-accredited institution or other educational source. However, if the Board has previously approved credits for courses and programs, those credits are transferable among all Idaho public institutions. Notwithstanding the foregoing, an institution may deny credit transfer to comply with specialized accreditation requirements, or in unique degree requirements.~~
- ~~— f. Credits accepted by one institution under the Board's governance are transferable by the student to any other postsecondary institution under the Board's governance.~~



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## Idaho State Board of Education

**GOVERNING POLICIES AND PROCEDURES**

SECTION: III. POSTSECONDARY AFFAIRS

SUBSECTION: V. Articulation and ~~Associate Degree Policy~~ TransferAugust 2011  
December 2012**1. Statewide Articulation****a. Associate of Arts and Associate of Science Degrees**

To facilitate the transfer of students, Boise State University, Idaho State University, Lewis-Clark State College, the University of Idaho, the College of Southern Idaho, North Idaho College, and the College of Western Idaho, shall individually and jointly honor the terms of this statewide articulation policy.

Students who complete requirements for the Associate of Arts or Associate of Science degree at an accredited institution in Idaho ~~and Treasure Valley Community College~~ will be considered as satisfying the lower division general education core requirements and shall be granted junior standing upon transfer to a four-year public institution in Idaho and will not be required to complete any additional lower division general education core courses subject to the conditions listed below.

Transfer students from any in-state or out-of-state academic accredited institution who have completed the equivalent of the State Board of Education's general education core for the Associate Degree will not be required to complete additional lower division general education core courses. However, these students must obtain certification of such completion. Certification of successful completion of the lower division general education core for students who have not completed the Associate of Science or Associate of Arts degree is the responsibility of the transferring institution.

This transfer policy will provide for the fulfillment of all general education, lower division core requirements only. It is not intended to meet specific course requirements of unique or professional programs (e.g., engineering, pharmacy, business, etc.). Students who plan to transfer to unique or professional programs should consult with their advisors and make early contact with a program representative from the institution to which they intend to transfer.

Transfer students who have not completed the Associate of Arts or Associate of Science or the general education core courses will not come under the provision of this articulation policy.

A maximum of seventy (70) lower division credit hours or one-half of the total credits required for a student's intended baccalaureate degree, whichever is greater, will normally be accepted for transfer from accredited community or junior colleges.

**b. Associate of Applied Science Degrees**



## Idaho State Board of Education

## GOVERNING POLICIES AND PROCEDURES

SECTION: III. POSTSECONDARY AFFAIRS

SUBSECTION: V. Articulation and Associate Degree Policy TransferAugust 2011 December 2012

Students who complete all or a portion of the State Board of Education's general education coursework for the Associate of Applied Science degree at one of the public postsecondary institutions in Idaho may fully transfer those completed general education core courses into an academic program. However, professional-technical transfer students who have not completed any courses under the general education core will not be covered under the provisions of this articulation policy.

## 2. Transfer Associate Degree

The lower division 100 and 200 level general education core requirement must fit within the following thirty (30) credit and course requirements and must have a minimum of thirty-six (36) credit hours. The remaining six (6) credits may come from the list below, interdisciplinary courses, or foundational program courses.

	Required Courses	Minimum Credits
a. <u>Communications</u> Coursework in this area enhances students' ability to communicate clearly, correctly, logically, and persuasively in spoken English. <u>Disciplines:</u> Speech, Rhetoric, and Debate	1	2
b. <u>English Composition</u> In meeting this goal, students must be able to express themselves in clear, logical, and grammatically correct written English. Up to six (6) credits may be exempt by ACT, SAT, CLEP or other institution accepted testing procedure. *3 or 6 credit hours depending upon initial placement results.	1	3 to 6*
c. <u>Behavioral and Social Science</u> Coursework in this area provides instruction in: (1) the history and culture of civilization; (2) the ways political and/or economic organizations, structures and institutions function and influence thought and behavior; and (3) the scientific method as it applies to social science research. <u>Disciplines:</u> Anthropology, Economics, Geography, History, Political Science, Psychology and Sociology. Note: Courses must be distributed over two (2) different disciplines.	2	6
d. <u>Humanities, Fine Arts, and Foreign Language</u> Coursework in this area provides instruction in: (1) the creative process; (2) history and aesthetic principles of the fine arts; (3) philosophy and the arts as media for exploring the human condition and examining values; and (4) communication skills in a foreign language. <u>Disciplines:</u> Art, Philosophy, Literature, Music, Drama/Theater, and Foreign Languages.	2	6
e. <u>Natural Science</u> Coursework in this area: (1) provides an understanding of how the biological and physical sciences explain the natural world and (2) introduces the basic concepts and terminology of the natural sciences. <u>Disciplines:</u> Biology, Chemistry, Physical Geography, Geology, and Physics. Note: Courses may be distributed over two (2) different disciplines and must have at least one (1) accompanying laboratory experience.	2	7



## Idaho State Board of Education

## GOVERNING POLICIES AND PROCEDURES

SECTION: III. POSTSECONDARY AFFAIRS

SUBSECTION: V. Articulation and Associate Degree Policy TransferAugust 2011/December 2012

	Required Courses	Minimum Credits
f. <u>Mathematics</u> Coursework in this area is intended to develop logical reasoning processes; skills in the use of space, numbers, symbols, and formulas; and the ability to apply mathematical skills to solve problems. <u>Disciplines:</u> College Algebra, Calculus, Finite Mathematics, and Statistics.	1	3

## 3. Associate of Applied Science Degree.

This professional-technical degree requires a minimum of 15 credit hours of general education coursework selected from each institution's general education core and is comparable to the general education core of the Associate of Arts (A.A.) and Associate of Science (A.S.) degrees. The courses completed from the general education core of the A.A.S. will be fully transferable to the A.A., A.S., and baccalaureate degrees.

	Required Courses	Minimum Credits
a. <u>English/Communication</u> In meeting this goal, students must be able to express themselves in clear, logical, and grammatically correct written English. <u>Disciplines:</u> English 101 required, English 102 or Communication 101; An Applied English or Technical Writing course may be used if found to be comparable to ENGL 102.	2	6
b. <u>Mathematics/Computation</u> Coursework in this area is intended to develop logical reasoning processes; skills in the use of space, numbers, symbols, and formulas; and the ability to apply mathematical skills to solve problems. <u>Disciplines:</u> College Algebra, Calculus, Finite Mathematics and Mathematical Statistics. An Applied Mathematics course may be used if found to be comparable to a traditional mathematics course.	1	3
c. <u>Social Science/Human Relations</u> Coursework in this area provides the student with the skills needed for understanding individuals in the work place and the functioning of thought and behavior. <u>Disciplines:</u> Human Relations, Psychology, and Sociology	1	3
d. <u>Elective</u> Coursework in this area may come from any general education core requirement as listed in III.V.2.	1	3

4. Authority is delegated to the postsecondary institutions under the Board's governance to evaluate and accept credits on behalf of transferring students who have earned those credits from any out-of-state accredited institution or from any non-accredited institution or other educational source. However, if the Board has previously approved credits for courses and programs, those credits are transferable among all Idaho public institutions. Notwithstanding the foregoing, an institution may deny credit transfer to comply with specialized accreditation requirements, or in unique degree requirements.



Idaho State Board of Education

**GOVERNING POLICIES AND PROCEDURES**

SECTION: III. POSTSECONDARY AFFAIRS

SUBSECTION: V. Articulation and ~~Associate Degree Policy~~ Transfer

~~August 2011~~ December  
2012

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Credits accepted by one institution under the Board's governance are transferable by the student to any other postsecondary institution under the Board's governance.



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
OCTOBER 18, 2012**

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**SUBJECT**

Board Policy III.AA. Accountability Oversight Committee – 1<sup>st</sup> Reading

**REFERENCE**

April 2010	The Board approved the second reading of Board Policy III.AA.
February 2010	The Board approved the first reading of Board Policy III.AA.

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho State Board of Education Governing Policies & Procedures, Section III.AA. Accountability Oversight Committee

**BACKGROUND/DISCUSSION**

Board Policy III.AA., Accountability Oversight Committee, outlines the membership and responsibilities of the Board's Accountability Oversight Committee. The Board's Accountability Oversight committee is an ad hoc committee of the Board and is staffed by the Board's Accountability Program Manager. The committee is responsible for reviewing and making recommendation on the results of the statewide assessments, and producing an annual report of student achievement to the Board.

The original composition of the committee includes four (4) members recommended by the Governor and appointed by the Board. It is felt at this time that while the Governor may still make recommendations on appointments to this committee, removing this language from the policy would allow for greater flexibility in filling vacant positions that may arise on the committee.

The proposed changes to this policy would strike the language requiring a recommendation from the Governor's office prior to filling a vacancy of one of the four (4) previously Governor recommended positions.

**IMPACT**

The proposed change would give the Board greater flexibility in filling vacant or expired positions on the committee in a timely manner. Recommendations may still be given by the Governor or the Governor's staff, however, if they do not have a recommendation the Board will be able to move forward in filling vacant positions.

There is currently one expired position on the committee. If the policy amendments pass the first reading, a recommendation for the expired seat will be brought forward to the Board for consideration in conjunction with the second reading of the policy amendments in December.



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
OCTOBER 18, 2012**

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**ATTACHMENTS**

Attachment 1 – Board Policy III.AA., Accountability Oversight Committee Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

Amendments to Board Policy III.AA. will allow for the Board to fill vacant positions in a more timely manner while still allowing for the Governor to make recommendations should he desire.

The Governor's office was contacted regarding the proposed change and staff received no concerns regarding the amendment. There is currently one expired position on the committee. The position expired July 1<sup>st</sup>.

Board staff recommends approval of the policy as presented.

**BOARD ACTION**

I move to approve the first reading of policy amendments to Board Policy III. AA. Accountability Oversight Committee.

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



**Idaho State Board of Education**

**GOVERNING POLICIES AND PROCEDURES**

**SECTION: III. ACADEMIC AFFAIRS**

**SUBSECTION: AA. Accountability Oversight Committee ~~April 2010~~December 2012**

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**1. Overview**

The Accountability Oversight Committee will function as an ad hoc committee of the Idaho State Board of Education and be staffed by the Board's Accountability Program Manager.

**2. Duties and Responsibilities**

- a. Provide recommendations to the Board on the effectiveness of the statewide student achievement system and make recommendations on improvements and/or changes as needed.
- b. Develop and review an annual report of student achievement. This report shall be compiled collaboratively by Board and State Department of Education staff and submitted to the committee for review. The committee will forward the report to the Board with recommendations annually.

**3. Meetings and Operating Procedures**

The committee shall meet twice annually, additional meetings may be called by the Chair as needed.

**4. Membership**

The committee membership shall consist of:

- Two members of the Idaho State Board of Education, appointed by the Board president;
- The Superintendent of Public Instruction; and
- Four members recommended by the Governor and appointed by the Board, one of which will chair the committee, who shall serve a term of one year.

**5. Terms of Membership**

Board members appointed to the committee serve at the pleasure of the president of the Board. Committee members ~~recommended by the Governor and~~ appointed by the Board shall serve two-year terms. An incumbent member may be recommended by the Governor for re-appointment by the Board. All terms shall begin on July 1<sup>st</sup> and end on June 30<sup>th</sup> of the year(s) beginning or ending said term.

Appointments shall be staggered to ensure that no more than two (2) appointments will become vacant in any given year.

An appointee who has reached the end of his or her term shall remain in service as a committee member until re-appointment, or until the appointment of a new member by the Board. Committee officers will be nominated and elected by a vote of the committee.



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS**  
**OCTOBER 18, 2012**

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The Superintendent of Public Instruction will serve as an ex-officio member of the committee.

6. Reporting

This committee shall report directly to the Board.



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS**  
**OCTOBER 18, 2012**

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**SUBJECT**

Board Policy III.AB. Rural Physician Incentive Program Oversight Committee –  
1<sup>st</sup> Reading

**REFERENCE**

June 2010	The Board approved the second reading of Board Policy III.AB.
April 2010	The Board approved the first reading of Board Policy III.AB.

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-3723 – 33-3725, Idaho code.  
Idaho State Board of Education Governing Policies & Procedures, Section III.AB.  
Rural Physician Incentive Program Oversight Committee

**BACKGROUND/DISCUSSION**

The Idaho Rural Physician Incentive Program was approved by the 2003 Idaho Legislature to encourage primary care physicians to practice in medically underserved areas of Idaho. Sections 33-3723 through 33-3725, Idaho Code established the authority of the Board, through an oversight committee, to administer the program and assess/collect the rural physician incentive fee. Board Policy III.AB. set out the membership, duties, and operating procedures of the committee.

During the 2012 Legislative session changes were made to Idaho statute moving the administration of the Rural Physician Incentive Program to the Department of Health and Welfare's Office of Rural Health. As part of this change, the Rural Physician Incentive Program Oversight Committee was combined with an already existing committee within the Department of Health and Welfare. This move has made Board Policy III.AB. obsolete.

**IMPACT**

The proposed change would repeal Board Policy III.AB., eliminating the Rural Physician Incentive Program Oversight Committee policy in its entirety.

**ATTACHMENTS**

Attachment 1 – Board Policy III.AB., Rural Physician Incentive  
Program Oversight Committee

Page 3

**STAFF COMMENTS AND RECOMMENDATIONS**

Board staff recommends approval of the policy as presented.



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS**  
**OCTOBER 18, 2012**

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**BOARD ACTION**

I move to approve the first reading of amendments repealing Board Policy III. AB.  
Rural Physician Incentive Program Oversight Committee of Board Policy.

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



**Idaho State Board of Education**

**GOVERNING POLICIES AND PROCEDURES**

**SECTION: III. ACADEMIC AFFAIRS**

**SUBSECTION: AB. Idaho Rural Physician Incentive Program**

**June 2010**

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1. Overview

The Idaho Rural Physician Incentive Program was developed to encourage primary care physicians to practice in medically underserved areas of Idaho. [Sections 33-3723](#), 33-3724, and 33-3725, Idaho Code establish the authority for the State Board of Education (Board), through an oversight committee, to administer the Idaho Rural Physician Incentive Program, and to assess and collect the rural physician incentive fee.

Idaho Code Section 33-3724 authorizes the Rural Physician Incentive Fund and facilitates payment of qualified educational debts of rural physicians who practice in areas of the state that are medically underserved and that demonstrate the need for assistance in physician recruitment. The fund is funded by fees assessed to all Idaho students participating in the WWAMI (Wyoming, Washington, Alaska, Montana and Idaho) and University of Utah state supported medical education programs.

2. Idaho Rural Physician Incentive Program Oversight Committee

The Idaho Rural Physician Incentive Program Oversight Committee (Oversight Committee) is established per Idaho Code 33-2724 and shall serve under the direction of the Board.

a. Oversight Committee Membership

Committee membership shall have a balanced representation of primary constituent groups within health professions. The committee shall be composed of members from the following organizations:

- i. Idaho Hospital Association
- ii. Idaho Medical Association
- iii. Idaho Osteopathic Association
- iv. Office of Rural Health and Primary Care
- v. The Idaho Area Health Education Center
- vi. Medical Student Program Administrator
- vii. Each Idaho Physician Residency Program receiving State appropriated fund support
- viii. Other appropriate organizations

b. Nominating Process



**INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS  
OCTOBER 18, 2012**

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~~The Executive Director shall solicit written nominations of qualified individuals from each of the organizations provided above for committee membership. The Executive Director may select from the nominations or select other qualified individuals to serve on the committee. All selections by the Executive Director are subject to approval by the Board. The list of candidates must be forwarded to the Board for consideration not less than 60 days prior to expiration of the term of committee member, or within 30 days after any vacancy.~~

**c. ~~Terms of Membership~~**

~~Committee members shall serve three-year terms. An incumbent member may be nominated by the committee for re-appointment by the Board, but no member may serve more than three (3) consecutive terms. All terms shall begin on July 1 and end on June 30 of the year(s) beginning or ending said term.~~

~~Appointments will be staggered to ensure continuity of operations as members of the Committee complete their initial term of appointment and are reappointed or replaced. An appointee who has reached the end of his or her term shall remain in service as a committee member until reappointment, or until the appointment of a new member is named and approved by the Board. Officers will be nominated and elected by a vote of the committee.~~

**d. ~~Elections of Officers~~**

~~The Committee will elect a Chair, Vice-chair, and Secretary for terms of office of one year. The Chair will call and conduct each meeting of the Committee. In the absence of the Chair, the Vice-chair may call and conduct each meeting. The Chair or Vice-chair will provide a brief oral report after each meeting to the Executive Director. The Committee Secretary will ensure that a brief written summary of each Committee meeting, along with Committee approved actions/recommendations, is forwarded to the Executive Director in a timely manner.~~

**e. ~~Operating Procedures~~**

~~The Committee will meet at the call of the Chair as often as necessary to fulfill Committee responsibilities but not less than twice each calendar year. Time and location of all meetings is at the discretion of Chair based on availability of Committee members. A meeting agenda will be published prior to each meeting and made available to Committee members along with appropriate meeting materials. All meetings will conform to Section, 67-2340-67-2347, Idaho Code, Open Meeting Law.~~

**f. ~~Duties of the Oversight Committee~~**

~~The Committee will solicit qualified physician applicants/eligible areas for participation in the Rural Physician Incentive Program; and select and prioritize~~



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~~approved physician candidates/eligible areas consistent with the Board approved criteria (see IDAPA 08.01.14, subsections .014 and .016). Awards shall not exceed the amount available in the fund when making award recommendations.~~



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<b>TAB</b>	<b>DESCRIPTION</b>	<b>ACTION</b>
<b>1</b>	<b>SUPERINTENDENT’S UPDATE</b>	Information Item
<b>2</b>	<b>BSU – IDO TEACH PROGRAM – IDAPA 08.02.02.100</b>	Approval Item
<b>3</b>	<b>ESEA WAIVER</b>	Approval Item



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**SUBJECT**

Superintendent of Public Instruction Update to the State Board of Education

**BACKGROUND/DISCUSSION**

Superintendent of Public Instruction, Tom Luna, will provide an update on the State Department of Education.

**BOARD ACTION**

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



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**SUBJECT**

Boise State University – IDo-Teach Program

**APPLICABLE STATUTE, RULE, OR POLICY**

Section 33-114 and 33-1258, Idaho Code

Idaho Administrative code, IDAPA 08.02.02.100 - Official Vehicle for the Approval of Teacher Education Programs

**BACKGROUND/DISCUSSION**

The Colleges of Education and Arts and Sciences at Boise State University request approval to modify the program of study for students pursuing Secondary Math and/or Science Teaching Endorsement by replicating the UTeach teacher preparation program. The UTeach program is a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The program has been in existence for over 10 years.

The BSU program, IDo-Teach, will implement the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for Idaho students. Each course in the program has well established learning objectives, identified artifacts of evidence for meeting objectives, assessments, instructional emphases, and core competencies.

The Standards Committee of the Professional Standards Commission (PSC) conducted a New Program Approval Desk Review of the IDo-Teach program proposed by Boise State University (BSU). Dr. Louis Nadelson presented to the committee on the background of the UTeach model as well as his involvement through BSU and STEM initiatives. Through his comprehensive proposal and presentation, the Standards Committee gained a clear understanding that all of the Idaho Standards for pedagogy as well as Math and Science Teachers would be met and/or surpassed through the proposed program.

During its September 2011 meeting, the Professional Standards Commission voted to recommend Conditional Approval of the proposed IDo-Teach program offered by Boise State University. With the conditionally approved status, BSU may admit candidates to the IDo-Teach program, and will undergo full state approval once there are program completers.

**IMPACT**

In order to produce graduates eligible for Idaho teacher certification, Boise State University must offer Teacher Preparation programs adequately aligned to State Standards.



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**ATTACHMENTS**

Attachment 1 – BSU IDo-Teach Program of Study

Page 3

**BOARD ACTION**

I move to accept the Professional Standards Commission recommendation and to grant conditionally approval of Boise State University's IDo-Teach program as an approved Teacher Certification Program.

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



**Ido-Teach Program**  
**Boise State University**  
**College of Education, College of Arts and Science**

Submitted by:  
Louis Nadelson, and Laurie Cavey  
Co-Directors IDo-Teach at Boise State University  
[louisnadelson@boisestate.edu](mailto:louisnadelson@boisestate.edu), [lauriecavey@boisestate.edu](mailto:lauriecavey@boisestate.edu)  
208-426-2856

The Colleges of Education and Arts and Sciences at Boise State University request approval to modify the program of study for students pursuing Secondary Math and/or Science Teaching Endorsement by replicating the UTeach teacher preparation program. The UTeach program is a nationally recognized program for math and science teacher preparation and has been successfully replicated in 22 sites throughout the United States. The program has been in existence for over 10 years.

Our program, IDo-Teach, will implement the UTeach curriculum, replicating the scope and sequence as it has been established, and will adapt and adopt elements of the courses that are more relevant for our students. Each course in the program has well established learning objectives, identified artifacts of evidence for meeting objectives, assessments, instructional emphases, and core competencies.

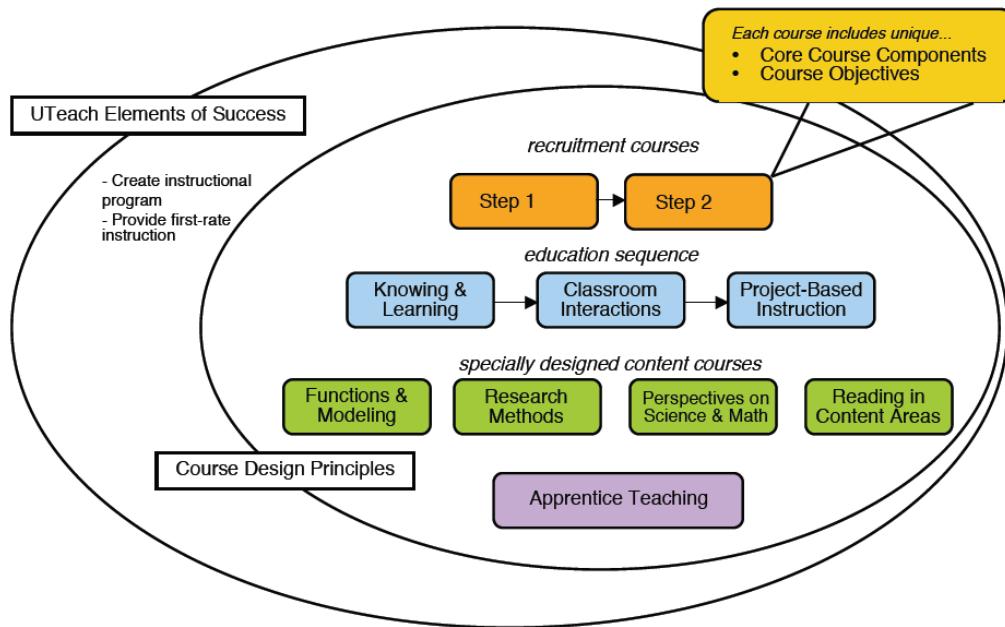


Figure 1. The UTeach courses and curricular elements

## UTeach Courses



- **Step 1: Inquiry Approaches to Teaching** - Step 1 allows students to explore teaching as a career at no cost. Following an introduction to the theory and practice behind excellent inquiry-based science and mathematics instruction, students teach lessons in elementary classrooms to obtain firsthand experience in planning and implementation.
- **Step 2: Inquiry-Based Lesson Design** - In Step 2, the second 1-credit course for which UTeach Austin offers a tuition rebate, students continue developing the lesson planning skills learned in Step 1 as they become familiar with exemplary middle school science curricula. After observing a lesson being taught in a local school district classroom, students work alone or in pairs to themselves plan and teach three inquiry-based lessons to sixth, seventh, or eighth graders.
- **Knowing and Learning in Mathematics and Science** - Knowing and Learning in Mathematics and Science is the first in a sequence of three, 3-credit college of education courses in the UTeach program. It is followed by Classroom Interactions and Project-Based Instruction. Knowing and Learning is more than simply a general survey of theories in the STEM fields, its goal being for students to construct a model of knowing and learning that will guide their future classroom practice.
- **Classroom Interactions** - Classroom Interactions is typically the fourth UTeach course taken by students and the second in a series of three, 3-credit College of Education courses. It follows Knowing and Learning and precedes Project-Based Instruction. Classroom Interactions builds on the Knowing and Learning course, moving from a focus on thinking and learning to a focus on teaching and learning. The course is centered around a close examination of the interplay between teachers, students, and content, and how these types of interactions enable students to develop deep conceptual understanding. Prospective teachers are also introduced to ways in which curriculum and technology are used in classroom settings to build interrelationships among teachers and students. They are taught how content and pedagogy combine to make effective teaching.
- **Project-Based Instruction** - Project-Based Instruction (PBI) is the capstone course in the sequence of professional development courses (Knowing and Learning, Classroom Interactions, and PBI) UTeach students take prior to Apprentice Teaching. PBI is the course in which a number of the major principles and themes of the UTeach program—integration of mathematics and science content; infusion of technology in representation, analysis, modeling, assessment and contextualization of content; immersion in intensive field-based experiences; and a focus on designing equitable learning environments—are synthesized as the students develop an intellectually challenging project-based instructional unit. When students complete PBI, they are fully prepared for Apprentice Teaching.
- **Research Methods** - Research Methods is a one-semester three-hour course in the required UTeach sequence. It is one of several content courses specially designed to meet the needs of future teachers (others include Perspectives on Science and Mathematics and Functions and Modeling). It also fulfills multiple degree requirements. At UT Austin, the course fulfills both a science and a university substantial writing component requirement. Sections are limited to 30 students, who meet two hours per week for non-traditional,



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interactive lectures and two hours per week for lab. The course is cross-listed between Physics, Chemistry, and Biology.

- **Perspectives on Science and Mathematics** - Perspectives on Science and Mathematics is a 3 credit upper-division history course designed to meet the unique needs of future teachers. It is one of the specially designed content courses in the UTeach sequence (others include Functions and Modeling and Research Methods) that fulfills multiple degree requirements. At UT Austin, in addition to being a UTeach course, Perspectives fulfills a course requirement in the fine arts or humanities as well as a substantial writing requirement.
- **Functions and Modeling** - Functions and Modeling is a mathematics course designed to address the unique needs of future teachers of mathematics. It is required of UTeach math majors and also counts toward their mathematics degree. In this course, students engage in explorations and lab activities designed to strengthen and expand their knowledge of the topics found in secondary mathematics. Students collect data and explore a variety of situations that can be modeled using linear, exponential, polynomial, and trigonometric functions. Activities are designed to have them take a second, deeper look at topics they should have been exposed to previously; illuminate the connections between secondary and college mathematics; illustrate good, as opposed to typically poor, sometimes counterproductive, uses of technology in teaching; illuminate the connections between various areas of mathematics; and engage them in serious (i.e., non-routine) problem solving, problem-based learning, and applications of mathematics.
- **Apprentice Teaching** - The purpose of Apprentice Teaching is to offer UTeach students a culminating experience that provides them with the tools needed for their first teaching jobs. In Apprentice Teaching, students are immersed in the expectations, processes, and rewards of teaching. When making placements, UTeach master teachers consider each apprentice teacher's characteristics and abilities as well as the cooperating teacher's teaching and mentoring styles. The hope is that the complementary strengths of the UTeach apprentice teacher and cooperating teacher will generate a synergism that benefits both people professionally.

The matrix below illustrates, in many cases, multiple examples of evidence of learning for each performance indicator. It should also be noted that many of the courses of the UTeach program provide similar opportunities for students to meet the competencies for this endorsement.

### **K-12 Online Teaching Endorsement Matrix**

#### **Framework for Teaching Domain # 1: Planning and Preparation**

***Standard #1:** Knowledge of Math and Science The teacher understands the central concepts, tools of inquiry, and structures of the discipline taught and creates learning experiences that make these aspects of subject matter meaningful for students.*

Math and Science Content	Performance Indicator	Evidence
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<b>Courses</b>		
As Approved in 2009 Accreditation	As Approved in 2009 Accreditation	As Approved in 2009 Accreditation

***Standard #2:** Knowledge of Human Development and Learning – The teacher understands how students learn and develop, and provides opportunities that support their intellectual, social, and personal development.*

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
Step 2 [S2], Project-based Instruction [PBI], Reading in Content Areas [RCA]	The teacher assesses individual and group performance in order to design instruction that meets all students' needs	<ul style="list-style-type: none"> <li>• Analysis of pre- and post-assessment results to evaluate student learning [S2]</li> <li>• Written feedback on assessments by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Use of pre- and post-assessment results to revise one lesson plan [S2]</li> <li>• A project-based unit that includes alternative assessments [PBI]</li> <li>• Daily reading assignments [RCA]</li> <li>• Inquiry unit project consisting of five 5E reading lesson plans for middle grades students [RCA]</li> </ul>
Step 1 [S1], Step 2 [S2], Apprentice Teaching [AT]	The teacher stimulates student reflection and teaches students to evaluate and be responsible for their own learning.	<ul style="list-style-type: none"> <li>• Participation in class discussions on questioning strategies [S1]</li> <li>• Extensive examples of possible questions and expected responses listed in each lesson plan [S1]</li> <li>• Written feedback on draft lesson plans by master teacher</li> </ul>



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		<p>prior to student teaching [S1]</p> <ul style="list-style-type: none"> <li>• Written feedback by the mentor teacher following observations of student teaching [S1]</li> <li>• Written feedback by a master teacher following observations of student teaching [S1]</li> <li>• Participation in class discussions on questioning strategies [S2]</li> <li>• Extensive examples of possible questions and expected responses listed in each lesson plan [S2]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Weekly lesson plans and daily agendas [AT]</li> <li>• Sample assessments and student artifacts [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Step 2 [S2] Apprentice Teaching [AT]	The teacher identifies levels of readiness in learning and designs lessons that are	<ul style="list-style-type: none"> <li>• Analysis of pre- and post-assessment results to evaluate student learning [S2]</li> </ul>



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	developmentally appropriate.	<ul style="list-style-type: none"> <li>• Written feedback on assessments by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Use of pre- and post-assessment results to revise one lesson plan [S2]</li> <li>• Weekly lesson plans and daily agendas [AT]</li> <li>• Sample assessments and student artifacts [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Apprentice Teaching [AT]	The teacher creates a positive learning environment that supports students' self-confidence and competence across all developmental areas.	<ul style="list-style-type: none"> <li>• Written classroom rules and procedures [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> </ul>



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***Standard #7: Instructional Planning Skills - The online teacher plans and prepares instruction based upon knowledge of subject matter, students, the community, and curriculum goals.***

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
Classroom Interactions [CI], Apprentice Teaching [AT]	The teacher, as an individual and a member of a team, selects and creates learning experiences that are appropriate for curriculum goals, relevant to students, and based on principles of effective instruction and performance modes.	<ul style="list-style-type: none"><li>• Lesson plans, including essays justifying the plans and responses to reviewer comments [CI]</li><li>• Peer and instructor evaluations of practice teaching in the Classroom Interactions course [CI]</li><li>• Completion of appropriate sections of the preliminary portfolio [CI]</li><li>• Videotapes of teaching [CI]</li><li>• Observations and comments by classroom teachers, master teachers, and by the course instructor and teaching assistants. [CI]</li><li>• Weekly lesson plans and daily agendas [AT]</li><li>• Sample assessments and student artifacts [AT]</li><li>• Videotapes of teaching</li><li>• Completion of appropriate sections of the final portfolio [AT]</li><li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li><li>• Appropriate evaluations in the TDR [AT]</li></ul>
Step 1 [S1], Step 2 [S2], Apprentice Teaching [AT]	The teacher creates short-range and long-range instructional plans, lessons, and activities that are differentiated to meet the developmental and individual needs of diverse students.	<ul style="list-style-type: none"><li>• Discussion of strategies for achieving instructional equity [S1]</li><li>• Participation in class activities modeling strategies for achieving instructional</li></ul>



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		<p>equity [S1]</p> <ul style="list-style-type: none"> <li>• Discussion of strategies for achieving instructional equity [S2]</li> <li>• Participation in class activities modeling strategies for achieving instructional equity [S2]</li> <li>• Weekly lesson plans and daily agendas [AT]</li> <li>• Sample assessments and student artifacts [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Apprentice Teaching [AT]	The teacher responds to unanticipated sources of input by adjusting plans to promote and capitalize on student performance and motivation.	<ul style="list-style-type: none"> <li>• Weekly lesson plans and daily agendas [AT]</li> <li>• Sample assessments and student artifacts [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Step 1 [S1], Apprentice Teaching [AT]	The teacher establishes student assessments that align with curriculum goals and objectives.	<ul style="list-style-type: none"> <li>• Performance objectives and corresponding assessments included in each lesson plan [S1]</li> <li>• Standards cited in each lesson plan [S1]</li> <li>• Weekly lesson plans and</li> </ul>



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		<p>daily agendas [AT]</p> <ul style="list-style-type: none"> <li>• Sample assessments and student artifacts [AT]</li> </ul>
Step 2 [S2]	The teacher develops instructional plans based on student assessment and performance data.	<ul style="list-style-type: none"> <li>• Analysis of pre- and post-assessment results to evaluate student learning [S2]</li> <li>• Written feedback on assessments by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Use of pre- and post-assessment results to revise one lesson plan [S2]</li> </ul>
Step 1 [S1], Project-based Instruction [PBI]	The teacher integrates multiple perspectives into instructional planning with attention to students' personal, family, and community experiences and cultural norms.	<ul style="list-style-type: none"> <li>• Completion and analysis of personal learning difference or personality survey instrument [S1]</li> <li>• Participation in class discussions on the implications of personality and learning differences for teaching and learning [S1]</li> <li>• Videotape evidence of IDo-Teach students leading problem-based activities in a field setting [PBI]</li> <li>• A project-based unit including an anchor video, calendar, rationale, objectives, theoretical basis for the project, concept map, benchmark lessons, investigations, alternative assessments, strategies for differentiating instruction for students with special needs, related resources and technology tools. [PBI]</li> </ul>



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Project-based Instruction [PBI]	The teacher uses information from students, parents, colleagues, and school records to assist in planning instruction to meet individual student needs.	<ul style="list-style-type: none"> <li>• A project-based unit that includes lesson plans documenting modifications for special populations [PBI]</li> </ul>
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## Framework for Teaching Domain #2: The Classroom Environment

***Standard #5:** Classroom Motivation and Management Skills - The teacher understands individual and group motivation and behavior and creates a learning environment that encourages positive social interaction, active engagement in learning, and self-motivation.*

UTeach (IDo-Teach) Course(s)	Performance Indicator	Evidence
Apprentice Teaching [AT]	The teacher establishes a positive and safe climate in the classroom and participates in maintaining a healthy environment in the school as a whole.	<ul style="list-style-type: none"> <li>• Written classroom rules and procedures [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Apprentice Teaching [AT]	The teacher designs and implements a classroom management plan that maximizes class productivity by organizing, allocating, and managing the resources of time, space, and activities and by clearly communicating curriculum goals and objectives.	<ul style="list-style-type: none"> <li>• Written classroom rules and procedures [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Step 1 [S1]	The teacher utilizes a classroom	<ul style="list-style-type: none"> <li>• Safety issues addressed in</li> </ul>



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<p>Step 2 [S2] Project-based Instruction [PBI] Apprentice Teaching [AT]</p>	<p>management plan consistent with school district policies and building rules and procedures governing student behavior.</p>	<ul style="list-style-type: none"> <li>• each lesson plan [S1]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S1]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S1]</li> <li>• Safety issues addressed in each lesson plan [S2]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Participation in class discussion on safety and liability issues [PBI]</li> <li>• A project-based unit that includes safety precautions [PBI]</li> <li>• Written classroom rules and procedures [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
<p>Step 1 [S1] Step 2 [S2] Apprentice Teaching [AT]</p>	<p>The teacher creates a learning community in which students assume responsibility for themselves and one another, participate in decision-making, work collaboratively and independently, resolve conflicts, and engage in purposeful learning activities.</p>	<ul style="list-style-type: none"> <li>• Participation in class discussions on questioning strategies [S1]</li> <li>• Extensive examples of possible questions and expected responses listed in each lesson plan [S1]</li> <li>• Written feedback on draft lesson plans by master</li> </ul>



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		<p>teacher prior to student teaching [S1]</p> <ul style="list-style-type: none"> <li>• Written feedback by the mentor teacher following observations of student teaching [S1]</li> <li>• Written feedback by a master teacher following observations of student teaching [S1]</li> <li>• Participation in class discussions on questioning strategies [S2]</li> <li>• Extensive examples of possible questions and expected responses listed in each lesson plan [S2]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Apprentice Teaching [AT]	The teacher organizes, prepares students for, and monitors independent and group work that allows for the full and	<ul style="list-style-type: none"> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> </ul>



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	varied participation of all individuals.	<ul style="list-style-type: none"> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Project-based Instruction [PBI]	The teacher engages students in individual and cooperative learning activities that help them develop the motivation to achieve (e.g., relating lessons to real-life situations, allowing students to have choices in their learning, and leading students to ask questions and pursue problems that are meaningful to them).	<ul style="list-style-type: none"> <li>• Videotape evidence of IDo-Teach students leading problem-based activities in a field setting [PBI]</li> <li>• A project-based unit including an anchor video, calendar, rationale, objectives, theoretical basis for the project, concept map, benchmark lessons, investigations, alternative assessments, strategies for differentiating instruction for students with special needs, related resources and technology tools. [PBI]</li> </ul>
Apprentice Teaching [AT]	The teacher analyzes the classroom environment, making adjustments to enhance social relationships, student self-motivation and engagement, and productive work.	<ul style="list-style-type: none"> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>

**Framework for Teaching Domain #3: Instruction and Assessment**



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***Standard #3:** Modifying Instruction for Individual Needs - The teacher understands how students differ in their approaches to learning and creates instructional opportunities to meet students' diverse needs and experiences.*

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
Knowing and Learning [KL]	The teacher identifies and designs instruction appropriate to students' stages of development, strengths, needs, and cultural backgrounds.	<ul style="list-style-type: none"> <li>• Meaningful contributions to class discussions [KL]</li> <li>• Comments posted about analysis of readings [KL]</li> <li>• Analysis of clinical interviews [KL]</li> <li>• Written examinations [KL]</li> </ul>
Project-based Instruction [PBI]	The teacher makes modifications to lessons for individual students who have particular learning differences or needs.	<ul style="list-style-type: none"> <li>• A project-based unit that includes lesson plans documenting modifications for special populations [PBI]</li> </ul>
Step 1 [S1], Step 2 [S2]	The teacher accesses appropriate services or resources to meet students' needs.	<ul style="list-style-type: none"> <li>• Discussion of strategies for achieving instructional equity [S1]</li> <li>• Participation in class activities modeling strategies for achieving instructional equity [S1]</li> <li>• Discussion of strategies for achieving instructional equity [S2]</li> <li>• Participation in class activities modeling strategies for achieving instructional equity [S2]</li> </ul>
Project-based Instruction [PBI]	The teacher uses information about students' families, cultures, and communities as a basis for connecting instruction to students' experiences.	<ul style="list-style-type: none"> <li>• A project-based unit including an anchor video, calendar, rationale, objectives, theoretical basis for the project, concept map, benchmark lessons, investigations, alternative assessments, strategies for differentiating instruction for students with special needs, related resources and technology tools. [PBI]</li> </ul>



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Apprentice Teaching [AT]	The teacher creates a learning community in which individual differences are respected.	<ul style="list-style-type: none"> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Apprentice Teaching [AT]	The teacher persists in helping all students achieve success.	<ul style="list-style-type: none"> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>

***Standard #4:** Multiple Instructional Strategies - The online teacher understands and uses a variety of instructional strategies to develop students' critical thinking, problem solving, and performance skills.*

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
Step 1 [S1], Step 2 [S2], Classroom Interactions [CI], Project-based Instruction [PBI], Apprentice Teaching [AT]	The teacher evaluates methods for achieving learning goals and chooses various teaching strategies, materials, and technologies to meet instructional purposes and student needs.	<ul style="list-style-type: none"> <li>• Discussion of strategies for achieving instructional equity [S1]</li> <li>• Participation in class activities modeling strategies for achieving instructional equity [S1]</li> <li>• Discussion of strategies for</li> </ul>



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		<p>achieving instructional equity [S2]</p> <ul style="list-style-type: none"><li>• Participation in class activities modeling strategies for achieving instructional equity [S2]</li><li>• Written analyses and presentations of teaching [CI]</li><li>• Development of knowledge packages [CI]</li><li>• Artifacts produced by the use of such technology in the Classroom Interactions classroom [CI]</li><li>• Written reflections and essays [CI]</li><li>• A project-based unit that includes a rationale and objectives [PBI]</li><li>• A project-based unit that includes benchmark lessons and a lesson sequence that incorporates appropriate instructional approaches [PBI]</li><li>• Videotape evidence of IDo-Teach students leading problem-based activities in a field setting [PBI]</li><li>• A project-based unit that includes lessons that integrate the use of technology [PBI]</li><li>• Weekly lesson plans and daily agendas [AT]</li><li>• Sample assessments and student artifacts [AT]</li><li>• Videotapes of teaching</li><li>• Completion of appropriate sections of the final portfolio [AT]</li><li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li><li>• Appropriate evaluations in the TDR [AT]</li><li>• Student work containing</li></ul>
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		apprentice teacher written feedback [AT]
Step 1 [S1], Classroom Interactions [CI], Project-based Instruction [PBI], Reading in Content Areas [RCA], Apprentice Teaching [AT]	The teacher uses multiple teaching and learning strategies to engage students in learning.	<ul style="list-style-type: none"> <li>• Three inquiry-based lesson plans [S1]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S1]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S1]</li> <li>• Written analyses and presentations of teaching [CI]</li> <li>• Artifacts produced by the use of such technology in the Classroom Interactions classroom [CI]</li> <li>• Written analyses of the uses of technology [CI]</li> <li>• Videotape evidence of IDo-Teach students leading problem-based activities in a field setting [PBI]</li> <li>• A project-based unit including an anchor video, calendar, rationale, objectives, theoretical basis for the project, concept map, benchmark lessons, investigations, alternative assessments, strategies for differentiating instruction for students with special needs, related resources and technology tools. [PBI]</li> <li>• Daily reading assignments [RCA]</li> <li>• Inquiry unit project consisting of five 5E reading lesson plans for middle grades students [RCA]</li> <li>• Weekly lesson plans and daily agendas [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> </ul>



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		<ul style="list-style-type: none"> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Knowing and Learning [KL], Classroom Interactions [CI], Project-based Instruction [PBI], Reading in Content Areas [RCA],	The teacher uses a variety of instructional tools and resources (e.g., computers, audio-visual technologies, new technologies, local experts, primary documents and artifacts, texts, reference books, literature, and other print documents).	<ul style="list-style-type: none"> <li>• Participation in technology-based activities (e.g. modeling thinking) [KL]</li> <li>• Artifacts produced by the use of such technology in the Classroom Interactions classroom [CI]</li> <li>• Participation in discussions of the effectiveness of technology [CI]</li> <li>• Written analyses of the uses of technology [CI]</li> <li>• Completion of appropriate sections of the preliminary portfolio [CI]</li> <li>• In-class and online discussions [PBI]</li> <li>• An annotated list of relevant resources and technological tools for a project-based unit [PBI]</li> <li>• Classroom presentation utilizing technology tools [PBI]</li> <li>• A project-based unit that includes lessons that integrate the use of technology [PBI]</li> <li>• Daily reading assignments [RCA]</li> <li>• Inquiry unit project consisting of five 5E reading lesson plans for middle grades students [RCA]</li> </ul>



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**Standard #6:** *Communication Skills, Networking, and Community Building - The online teacher uses a variety of communication techniques including verbal, nonverbal, and media to foster inquiry, collaboration, and supportive interaction in and beyond the classroom.*

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
Classroom Interactions [CI], Apprentice Teaching [AT]	The teacher is a thoughtful and responsive listener	<ul style="list-style-type: none"> <li>• Written analyses and presentations of teaching [CI]</li> <li>• Written reflections and essays [CI]</li> <li>• Development of knowledge packages [CI]</li> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Student work containing apprentice teacher written feedback [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Step 2 [S2]	The teacher adjusts communication so that it is age and individually appropriate.	<ul style="list-style-type: none"> <li>• Participation in a class discussions that address the unique attributes of adolescents [S2]</li> <li>• One paragraph in each of three lesson plan that indicates why the instructional strategies are effective for adolescents [S2]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following</li> </ul>



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		observations of student teaching [S2]
Step 1 [S1], Step 2 [S2], Classroom Interactions [CI],	The teacher models effective communication strategies in conveying ideas and information and in asking questions to stimulate discussion and promote higher-order thinking.	<ul style="list-style-type: none"> <li>• Participation in class discussions on questioning strategies [S1]</li> <li>• Extensive examples of possible questions and expected responses listed in each lesson plan [S1]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S1]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S1]</li> <li>• Written feedback by a master teacher following observations of student teaching [S1]</li> <li>• Participation in class discussions on questioning strategies [S2]</li> <li>• Extensive examples of possible questions and expected responses listed in each lesson plan [S2]</li> <li>• Written feedback on draft lesson plans by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Written analyses and presentations of teaching [CI]</li> <li>• Written reflections and essays [CI]</li> <li>• Development of knowledge packages [CI]</li> </ul>



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Reading in Content Areas [RCA]	The teacher supports and expands student skills in speaking, writing, reading, and listening, and in using other mediums.	<ul style="list-style-type: none"> <li>• Daily reading assignments [RCA]</li> <li>• Inquiry unit project consisting of five 5E reading lesson plans for middle grades students [RCA]</li> </ul>
Perspectives [P]	The teacher demonstrates the ability to communicate effectively orally and in writing.	<ul style="list-style-type: none"> <li>• 5E lesson plans [P]</li> <li>• Various writing assignments [P]</li> <li>• Participation in class and weekly section discussions [P]</li> <li>• Mid-term and final exam responses [P]</li> <li>• Oral presentation and discussion of 5E lesson plans [P]</li> </ul>
Step 1 [S1], Step 2 [S2],	The teacher adjusts communication in response to cultural differences (e.g., appropriate use of eye contact and interpretation of body language).	<ul style="list-style-type: none"> <li>• Discussion of strategies for achieving instructional equity [S1]</li> <li>• Participation in class activities modeling strategies for achieving instructional equality. [S1]</li> <li>• Discussion of strategies for achieving instructional equity [S2]</li> <li>• Participation in class activities modeling strategies for achieving instructional equality. [S2]</li> </ul>
Project-based Instruction [PBI]	The teacher uses a variety of communication tools (e.g., audio-visual technologies, computers, and the Internet) to support and enrich learning opportunities.	<ul style="list-style-type: none"> <li>• An annotated list of relevant resources and technological tools for a project-based unit [PBI]</li> <li>• Classroom presentation utilizing technology tools [PBI]</li> <li>• A project-based unit that includes lessons that integrate the use of technology [PBI]</li> </ul>



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***Standard #8:** Assessment of Student Learning - The online teacher understands, uses, and interprets formal and informal assessment strategies to evaluate and advance student performance and to determine program effectiveness.*

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
Knowing and Learning [KL] Project-based Instruction [PBI]	The teacher selects, constructs, and uses a variety of formal and informal assessment techniques (e.g., observation, portfolios of student work, teacher-made tests, performance tasks, projects, student self-assessment, peer assessment, standardized tests, and tests written in primary language) to enhance knowledge of individual students, evaluate student performance and progress, and modify teaching and learning strategies.	<ul style="list-style-type: none"> <li>• Rubric given to students before clinical interview to clarify what will be assessed [KL]</li> <li>• Analysis of clinical interviews [KL]</li> <li>• Written examinations [KL]</li> <li>• Participation in technology-based activities (e.g. modeling thinking) [KL]</li> <li>• Summative and formative assessment [KL]</li> <li>• Facilitate problem-solving [KL]</li> <li>• A project-based unit that includes alternative assessments [PBI]</li> </ul>
Step 1 [S1], Step 2 [S2]. Project-based Instruction [PBI], Apprentice Teaching [AT]	The teacher uses multiple assessment strategies to measure students' current level of performance in relation to curriculum goals and objectives.	<ul style="list-style-type: none"> <li>• Performance objectives and corresponding assessments included in each lesson plan [S1]</li> <li>• Standards cited in each lesson plan [S1]</li> <li>• Analysis of pre- and post-assessment results to evaluate student learning [S2]</li> <li>• Written feedback on assessments by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Use of pre- and post-</li> </ul>



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		<p>assessment results to revise one lesson plan [S2]</p> <ul style="list-style-type: none"> <li>• A project-based unit that includes a rationale and objectives [PBI]</li> <li>• A project-based unit that includes alternative assessments [PBI]</li> <li>• Weekly lesson plans and daily agendas [AT]</li> <li>• Sample assessments and student artifacts [AT]</li> </ul>
<p>Step 1 [S1], Step 2 [S2]. Project-based Instruction [PBI], Apprentice Teaching [AT]</p>	<p>The teacher evaluates the effect of instruction on individuals and the class as a whole using a variety of assessment strategies.</p>	<ul style="list-style-type: none"> <li>• Performance objectives and corresponding assessments included in each lesson plan [S1]</li> <li>• Standards cited in each lesson plan [S1]</li> <li>• Analysis of pre- and post-assessment results to evaluate student learning [S2]</li> <li>• Written feedback on assessments by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Use of pre- and post-assessment results to revise one lesson plan [S2]</li> <li>• A project-based unit that includes a rationale and objectives [PBI]</li> <li>• A project-based unit that includes alternative assessments [PBI]</li> <li>• Weekly lesson plans and daily agendas [AT]</li> <li>• Sample assessments and student artifacts [AT]</li> </ul>



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Step 2 [S2]	The teacher appropriately uses assessment strategies to allow students to become aware of their strengths and needs and to encourage them to set personal goals for learning.	<ul style="list-style-type: none"> <li>• Analysis of pre- and post-assessment results to evaluate student learning [S2]</li> <li>• Written feedback on assessments by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Use of pre- and post-assessment results to revise one lesson plan [S2]</li> </ul>
Step [2]	The teacher monitors student assessment data and adjusts instruction accordingly.	<ul style="list-style-type: none"> <li>• Analysis of pre- and post-assessment results to evaluate student learning [S2]</li> <li>• Written feedback on assessments by master teacher prior to student teaching [S2]</li> <li>• Written feedback by the mentor teacher following observations of student teaching [S2]</li> <li>• Written feedback by a master teacher following observations of student teaching [S2]</li> <li>• Use of pre- and post-assessment results to revise one lesson plan [S2]</li> </ul>
Apprentice Teaching [AT]	The teacher maintains records of student work and performance, and communicates student progress to students, parents, colleagues, and others.	<ul style="list-style-type: none"> <li>• Participation in campus professional development days [AT]</li> <li>• Reflection submission on the Code of Ethics and Standards Practices for Idaho Educators [AT]</li> <li>• Submission of artifacts associated with parent/teacher contacts [AT]</li> </ul>



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		<ul style="list-style-type: none"> <li>• Completion of appropriate sections of the final portfolio [AT]</li> </ul>
Knowing and Learning [KL]	The teacher utilizes technology to facilitate a variety of effective assessment and evaluation strategies.	<ul style="list-style-type: none"> <li>• Participation in technology-based activities (e.g. modeling thinking) [KL]</li> <li>• summative and formative assessment [KL]</li> <li>• facilitate problem-solving [KL]</li> </ul>

### Framework for Teaching Domain #4: Professional Responsibilities

***Standard #9:** Professional Commitment and Responsibility - The online teacher is a reflective practitioner who demonstrates a commitment to professional standards and is continuously engaged in purposeful mastery of the art and science of online teaching.*

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
Apprentice Teaching [AT]	The teacher practices behavior congruent with The Code of Ethics for Idaho Professional Educators.	<ul style="list-style-type: none"> <li>• Participation in campus professional development days [AT]</li> <li>• Reflection submission on the Code of Ethics and Standards Practices for Idaho Educators [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Classroom Interactions [CI] Apprentice Teaching [AT]	The teacher adheres to local, state, and federal laws.	<ul style="list-style-type: none"> <li>• Participation in discussion and Internet postings regarding policies concerning students who have diverse needs [CI]</li> <li>• Participation in campus professional development days [AT]</li> <li>• Reflection submission on the Code of Ethics and Standards</li> </ul>



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		<p>Practices for Idaho Educators [AT]</p> <ul style="list-style-type: none"> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Step 2 [S2], Classroom Interactions [CI],	The teacher uses a variety of sources for evaluating his/her teaching (e.g., classroom observation, student achievement data, information from parents and students, and research).	<ul style="list-style-type: none"> <li>• Written reflections following student teaching experiences [S2]</li> <li>• One revised lesson plan submitted as a component of the final project [S2]</li> <li>• Essay providing rationale for revisions to the lesson plan as a component of the final project [S2]</li> <li>• Written analyses and presentations of teaching [CI]</li> <li>• Completion of appropriate sections of the preliminary portfolio [CI]</li> </ul>
Step 2 [S2], Classroom Interactions [CI]	The teacher uses self-reflection as a means of improving instruction.	<ul style="list-style-type: none"> <li>• Written reflections following student teaching experiences [S2]</li> <li>• One revised lesson plan submitted as a component of the final project [S2]</li> <li>• Essay providing rationale for revisions to the lesson plan as a component of the final project [S2]</li> <li>• Written analyses and presentations of teaching [CI]</li> <li>• Written reflections and essays [CI]</li> <li>• Development of knowledge packages [CI]</li> </ul>
Classroom Interactions [CI], Research Methods [RM], Functions and Modeling [FM], Apprentice Teaching [AT]	The teacher participates in meaningful professional development opportunities in order to learn current, effective teaching practices.	<ul style="list-style-type: none"> <li>• Participation in discussion and Internet postings regarding policies concerning students who have diverse needs [CI]</li> </ul>



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		<ul style="list-style-type: none"> <li>• Certificate demonstrating completion of human subject training [RM]</li> <li>• Four papers on four separate independent inquiries, designed and carried out by the student: (1) brief home inquiry, (2) laboratory inquiry using high school equipment, (3) survey involving human subjects, and (4) extended laboratory inquiry [RM]</li> <li>• Four written inquiries, with inquiries 2 and 4 involving at least two drafts [RM]</li> <li>• Classroom actives, labs, lab write-up, presentation of findings, assessments, and classroom performance in mathematics [FM]</li> <li>• Participation in campus professional development days [AT]</li> </ul>
Perspectives [P]	The teacher stays abreast of professional literature, consults colleagues, and seeks other resources to support development as both a learner and a teacher.	<ul style="list-style-type: none"> <li>• Participation in class and weekly section discussions [P]</li> <li>• Research skills workshop with university librarian [P]</li> <li>• Two 5E lesson plans designed for middle or high school students that address standards and integrate approaches and material learned in the course with independent research and science or math content. [P]</li> <li>• 5E lesson plan citations [P]</li> </ul>
Research Methods [RM], Functions and Modeling [FM], Perspectives [P]	The teacher engages in professional discourse about subject matter knowledge and pedagogy.	<ul style="list-style-type: none"> <li>• Two homework assignments reading scientific literature [RM]</li> <li>• Two brief in-class papers [RM]</li> <li>• Performance assessment during debate [RM]</li> <li>• Student presentations of open questions [RM]</li> </ul>



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		<ul style="list-style-type: none"> <li>• Classroom activities, labs, lab write-up, presentation of findings, assessments, and classroom performance in mathematics [FM]</li> <li>• Participation in class and weekly section discussions [P]</li> <li>• Research skills workshop with university librarian [P]</li> <li>• Two 5E lesson plans designed for middle or high school students that address standards and integrate approaches and material learned in the course with independent research and science or math content. [P]</li> <li>• 5E lesson plan citations [P]</li> </ul>
Step 1 [S1], Project-based Instruction [PBI], Knowing and Learning [KL], Classroom Interactions [CI],	The teacher uses technology to enhance productivity and professionalism.	<ul style="list-style-type: none"> <li>• Consistent use of various productivity applications and technologies such as email, web-based courseware, Internet, word-processing and presentation applications, etc. [S1]</li> <li>• In-class and online discussions [PBI]</li> <li>• Comments posted about analysis of readings [KL]</li> <li>• Participation in technology-based activities (e.g. modeling thinking) [KL]</li> <li>• Participation in discussion and Internet postings regarding policies concerning students who have diverse needs [CI]</li> </ul>

**Standard #10:** *Partnerships - The online teacher interacts in a professional, effective manner with colleagues, parents, and other members of the community to support students' learning and well being.*

<b>UTeach (IDo-Teach) Course(s)</b>	<b>Performance Indicator</b>	<b>Evidence</b>
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Step 1 [S1], Step 2 [S2], Classroom Interactions [CI], Apprentice Teaching [AT]	The teacher uses information about students and links with community resources to meet student needs.	<ul style="list-style-type: none"> <li>• Discussion of strategies for achieving instructional equity [S1]</li> <li>• Participation in class activities modeling strategies for achieving instructional equity [S1]</li> <li>• Discussion of strategies for achieving instructional equity [S2]</li> <li>• Participation in class activities modeling strategies for achieving instructional equity [S2]</li> <li>• Participation in discussion and Internet postings regarding policies concerning students who have diverse needs [CI]</li> <li>• Participation in campus professional development days [AT]</li> <li>• Reflection submission on the Code of Ethics and Standards Practices for Idaho Educators [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> </ul>
Apprentice Teaching [AT]	The teacher actively seeks to develop productive, cooperative, and collaborative partnerships with parents/guardians in support of student learning and well-being.	<ul style="list-style-type: none"> <li>• Submission of artifacts associated with parent/teacher contacts [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> </ul>
Classroom Interactions[CI], Apprentice Teaching [AT]	The teacher effectively uses professionals, paraprofessionals, volunteers, and peer tutors to promote student learning.	<ul style="list-style-type: none"> <li>• Observations and comments by classroom teachers, master teachers, and by the course instructor and teaching assistants. [CI]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in</li> </ul>



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		the TDR [AT]
Apprentice Teaching [AT]	The teacher respects the privacy of students and the confidentiality of information.	<ul style="list-style-type: none"> <li>• Written classroom rules and procedures [AT]</li> <li>• Videotapes of teaching [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> <li>• Participation in campus professional development days [AT]</li> <li>• Reflection submission on the Code of Ethics and Standards Practices for Idaho Educators [AT]</li> <li>• Submission of artifacts associated with parent/teacher contacts [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> </ul>
Classroom Interactions [CI], Apprentice Teaching [AT]	The teacher works with colleagues, other professionals, parents, and volunteers to improve the overall school learning environment for students.	<ul style="list-style-type: none"> <li>• Peer and instructor evaluations of practice teaching in the Classroom Interactions course [CI]</li> <li>• Observations and comments by classroom teachers, master teachers, and by the course instructor and teaching assistants. [CI]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Submission of artifacts associated with parent/teacher contacts [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Apprentice Teaching [AT]	The teacher develops rapport with students (e.g., talks with	<ul style="list-style-type: none"> <li>• Written classroom rules and procedures [AT]</li> </ul>



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	and listens to students and is sensitive and responsive to clues of distress).	<ul style="list-style-type: none"> <li>• Videotapes of teaching [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</li> <li>• Appropriate evaluations in the TDR [AT]</li> </ul>
Classroom Interactions [CI] Apprentice Teaching [AT]	The teacher acts as an advocate for students.	<ul style="list-style-type: none"> <li>• Participation in discussion and Internet postings regarding policies concerning students who have diverse needs [CI]</li> <li>• Participation in campus professional development days [AT]</li> <li>• Reflection submission on the Code of Ethics and Standards Practices for Idaho Educators [AT]</li> <li>• Submission of artifacts associated with parent/teacher contacts [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> </ul>
Perspectives [P] Apprentice Teaching [AT]	The teacher applies an understanding of the social, ethical, legal, and human issues surrounding the use of technology in schools.	<ul style="list-style-type: none"> <li>• Participation in class and weekly section discussions [P]</li> <li>• Research skills workshop with university librarian [P]</li> <li>• 5E lesson plan citations [P]</li> <li>• Participation in campus professional development days [AT]</li> <li>• Reflection submission on the Code of Ethics and Standards Practices for Idaho Educators [AT]</li> <li>• Completion of appropriate sections of the final portfolio [AT]</li> <li>• Observer written feedback on</li> </ul>



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		<p>teaching from the cooperating teacher, the university facilitator, and university instructors [AT]</p> <ul style="list-style-type: none"><li>• Appropriate evaluations in the TDR [AT]</li></ul>
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**SUBJECT**

Idaho's New Accountability System

**REFERENCE**

September 23, 2011	President Barrack Obama announces the US Department's plans to offer waivers from No Child Left Behind.
October 20, 2011	Board members review U.S. Department of Education's published guidance for the waiver.
December 7, 2011	Superintendent Luna reviews progress on Idaho's waiver application with Board members.
December 21, 2011	Members of the Accountability Committee provide feedback on waiver concepts.
January 10, 2012	Idaho Department of Education releases draft document of Idaho's proposed waiver.
January 20, 2012	Members of Instruction, Research, and Student Affairs review waiver.
February 16, 2012	State Board Approval of First Draft of ESEA Waiver
June 20, 2012	State Board Approval of College Entrance and Placement Exam benchmarks
August 16, 2012	State Board Approval of revisions to IDAPA 08.02.02. – Section 120, Local District Evaluation Policy – Teacher and Pupil Personnel Certificate Holders and adoption of IDAPA 08.02.02 – Section 121, Local District Evaluation Policy – Administrative Certificate Holders. Informational Item, update on Idaho's ESEA Waiver Application

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho Administrative Code, IDAPA 08.02.03.112. Accountability

**BACKGROUND/DISCUSSION**

The State Board of Education approved Idaho's Elementary and Secondary Act (ESEA) Waiver Application on February 16, 2012. Following that approval, the State Department of Education submitted Idaho's ESEA Waiver Application to the US Department of Education and has continued to work with them to make recommended changes to Idaho's application based on peer and US Department of Education staff recommendations. The attached document constitutes what has been submitted to the US Department of Education on September 28, 2012, and includes all changes in a tracked changes format.

Changes that have been made to the waiver since the State Board of Education approved it initially on February 16, 2012, include:

- Idaho has changed the allocation of points in the Postsecondary and Career Readiness measures. Now, 50 percent of the points in this measure will go toward graduation rate. The remaining 50 points will be



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split between advanced opportunities and college entrance exams. Idaho was in the process of making a similar change for Alternative Schools based on feedback we had received from superintendents and alternative school administrators but have now made this change for all schools at the request of the US Department of Education.

- Idaho added language to IDAPA 08.02.03.105 stipulating that of the 50% of teacher and administrator evaluations that will be based on student achievement, a percentage must be tied specifically to growth in student achievement as measured on the ISAT in all grades and subjects. This proposed rule was approved initially by the State Board of Education at their August 2012 meeting and is currently out for public comment.
- Idaho excluded all of the language within the waiver that would have removed English Language Learners in their second and third years from the reading and language arts achievement calculations. The U.S. Department of Education notified us that this was not among the waivers that comprise ESEA Flexibility and that Idaho needs to file a separate waiver to pursue this flexibility.
- Idaho added Annual Measurable Achievement Objectives (AMOs) to the waiver. Any Four- or Five-Star schools that have gaps in achievement between their At-Risk Subgroup and their overall student population greater than the statewide average for two consecutive years must submit a Continuous Improvement Plan that addresses only that subgroup gap and the measures the school will take to address it.
- The U.S. Department of Education requested that Idaho further increase the accountability for schools that do not test at least 95% of their students on the Idaho Standardized Achievement Test (ISAT). As a result of this request, a Five-Star School would drop two Star Ratings if it does not test at least 95% of its students. All other schools would drop one Star Rating if they do not test at least 95% of students, ensuring that the highest Star Rating any school not testing at least 95% of students could receive is a Three -Star Rating.
- Idaho has modified formal Supplemental Education Services (SES) and School Choice as defined by ESEA under Idaho's waiver application. The state also will no longer require districts to set aside any percentage of the district allocation of Title I-A funds for School Choice and SES. This is a change from our previous request to waive Choice and SES for one year and then operate under a revised Choice and Supplemental Tutoring Services program moving forward. In its place, Idaho will require its lowest-performing schools and districts that are identified under the One-Star and Two-Star categories to provide a plan, within the Ways to Improve School Effectiveness (WISE) Tool, for how they will meet the needs of students who are currently not proficient and who have not made adequate growth on either the Reading or Math sections of the ISAT. This plan must include information on how the district or school will provide students with extended learning time and how the school will make students and parents aware of their enrollment options that are currently



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available to students and parents as outlined in Idaho law. These plans will be reviewed and must be approved by the Idaho State Department of Education to ensure that what the district and school proposes, meets the minimum qualifications and expectations for extended learning time and enrollment options. If it does not, they will be required to revise their plan to meet these expectations. This change allows Idaho to highlight the many school choice opportunities currently available to students throughout Idaho and ensures that more students are able to access additional services if they are struggling. Under the limited ESEA definition of School Choice and Supplemental Tutoring Services, many students were not able to take advantage of the opportunities due to Idaho's rural nature.

- Idaho was required to make revisions to our entrance and exit criteria for our Priority (1 Star) and Focus (2 Star) schools. In the original ESEA Waiver guidance published by the U.S. Department of Education, it asked states to develop an accountability system in which they would identify their lowest 5% of schools to be labeled as Priority Schools and their next lowest 10% to be labeled as Focus Schools. The U.S. Department of Education identified Priority Schools as those schools that have the lowest achievement and lacking progress over time. Focus schools were identified as those schools that have the largest achievement gaps for the ESEA subpopulations. As Idaho developed our accountability system, we chose to develop the Five-Star Rating System in which the lowest 5% of schools would be identified as 1 Star Schools and the next lowest 10% would be identified as 2 Star Schools. As a result, Idaho's criterion for 1 and 2 Star schools is more comprehensive than the federal definition. During the process of getting our waiver approved, Idaho State Department of Education staff have worked with the U.S. Department of Education to ensure that the schools we had identified as 1 Star and 2 Star Schools were as close a match as possible to the schools that would have been identified using the U.S. Department of Education's definition of Priority and Focus schools. As a result of these ongoing conversations, Idaho was required to redefine our entrance and exit criteria for Focus and Priority schools as defined by the US Department of Education. In Idaho's original waiver submission, it took two years at a 1 Star ranking or 2 Star ranking to enter the Priority and or Focus status, respectively. Likewise, it took two years at a 3 Star ranking or above to exit that status. The requirement of the U.S. Department of Education is that Idaho identify Priority (1 Star) and Focus (2 Star) and those schools must start developing and executing their improvement plans this school year.
- Schools that have been identified as Priority (1 Star) and Focus (2 Star) status this year must implement their improvement plans for three years before being allowed to exit regardless of their Star Rating moving forward. These changes in the entrance and exit criteria only apply to those schools that are identified as Focus or Priority Status this year. All schools that enter a (1 Star) or (2 Star) status in the future will still be able



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to utilize the two-year entrance and exit criterion that was outlined in Idaho's original ESEA Waiver.

- Idaho will calculate growth for subgroups by combining all subgroups into one at-risk subgroup and only counting each student one time. This change was made to ensure that more schools would reach the N count of 25 which would avoid schools not having to be accountable for subgroups and it ensures that larger schools that do have 25 students in each subgroup are not being penalized multiple times for the same student.
- The US Department of Education required Idaho to provide further analysis related to our growth calculations and demonstrate how our system and the US Department of Education's definition for Focus and Priority Schools were identifying the same schools (ESEA Waiver Attachments 30 and 31).
- The waiver required the State Board of Education to set benchmarks for the College and Career Readiness measures. These benchmarks were approved by the State Board of Education during the June meeting.

**IMPACT**

If the State Board of Education does not approve Idaho's application, Idaho schools will continue to be held accountable using NCLB matrix. Now that Idaho's ESEA Waiver Application has been approved by the U.S. Department of Education, it must be approved by the Idaho State Board of Education before Idaho can accept the waiver as our new accountability system.

**ATTACHMENTS**

Attachment 1– Idaho's ESEA Flexibility Application

Page 5

**STAFF COMMENTS AND RECOMMENDATIONS**

Approval of the revised ESEA Accountability Waiver Application is recommended by the Board's Accountability Program Manager. Even with the numerous changes in Idaho's application, the proposed measures in this system provide a more robust measure of student academic performance than the existing No Child Left Behind system. The changes made to the application through negotiations with the US DOE described above are likely improvements in many instances over the original application. Yet, they do not diminish emphasis on the three principles described in the original application. As with that original application approved by the Board in February 2012, the state will have the opportunity to improve upon this proposed system as needed in the future.

**BOARD ACTION**

I move to approve Idaho's application for ESEA Flexibility as submitted.

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



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**IDAHO STATE DEPARTMENT OF  
EDUCATION  
ESEA FLEXIBILITY  
REQUEST**

~~02/16/2012~~ 09/28/2012

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U.S. Department of Education  
Washington, DC 20202

OMB Number: 1810-0708  
Expiration Date: March 31, 2012

Paperwork Burden Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is 1810-0708. The time required to complete this information collection is estimated to average 336 hours per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate or suggestions for improving this form, please write to: U.S. Department of Education, Washington, D.C. 20202-4537.



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LABEL	LIST OF ATTACHMENTS	PAGE
<b>Attachments could be found at the end of the document with page numbers formatted as “Page _ of _” on the bottom right. Attachments are organized in a separate pdf/PDF portfolio and could be identified with each corresponding Attachment Number.</b>		
1	Notice to LEAs	1-5
2	Comments on request received from LEAs and <del>p</del> Public	<del>6-133</del> - 128
3	Notice and information provided to the public regarding the request	<del>134-</del> 1361-3
4	Evidence that the State has formally adopted college- and career-ready content standards consistent with the State’s standards adoption process	<del>137-</del> 1451-9
5	Memorandum of understanding or letter from a State network of institutions of higher education (IHEs) certifying that meeting the State’s standards corresponds to being college- and career-ready without the need for remedial coursework at the postsecondary level (if applicable)	<del>146-</del> 1551-10
6	State’s Race to the Top Assessment Memorandum of Understanding (MOU) (if applicable)	<del>156-</del> 1731-18
7	Evidence that the SEA has submitted high-quality assessments and academic achievement standards to the Department for peer review, or a timeline of when the SEA will submit the assessments and academic achievement standards to the Department for peer review (if applicable)	
8	A copy of the average statewide proficiency based on assessments administered in the 2010-2011 school year in reading/language arts and mathematics for the “all students” group and all subgroups (if applicable).	<del>174-</del> 2221-49
9	Table 2: Reward, Priority, and Focus Schools	<del>361-12</del>
10	A copy of any guidelines that the SEA has already developed and adopted for local teacher and principal evaluation and support systems (if applicable).	<del>223-</del> 2281-6
11	Evidence that the SEA has adopted one or more guidelines of local teacher and principal evaluation and support systems	<del>229-</del> 2441-16
12	Set-Aside Requirements	<del>245-</del> 2481-4
13	Graduation Rate Approval Waiver Letter	<del>249-</del> 2501-2
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15	Minutes of Meeting – Administrator Effectiveness Framework Working Agenda – December 15, 2011	<del>254-</del> 2561-3
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## COVER SHEET FOR ESEA FLEXIBILITY REQUEST

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WAIVER

By submitting this flexibility request, the SEA requests flexibility through waivers of the ten ESEA requirements listed below and their associated regulatory, administrative, and reporting requirements by checking each of the boxes below. The provisions below represent the general areas of flexibility requested;

- ☒ 1. The requirements in ESEA section 1111(b)(2)(E) (H) that prescribe how an SEA must establish annual measurable objectives (AMOs) for determining adequate yearly progress (AYP) to ensure that all students meet or exceed the State's proficient level of academic achievement on the State's assessments in reading/language arts and mathematics no later than the end of the 2013-2014 school year. The SEA requests this waiver to develop new ambitious but achievable AMOs in reading/language arts and mathematics in order to provide meaningful goals that are used to guide support and improvement efforts for the State, LEAs, schools, and student subgroups.
- ☒ 2. The requirements in ESEA section 1116(b) for an LEA to identify for improvement, corrective action, or restructuring, as appropriate, a Title I school that fails, for two consecutive years or more, to make AYP, and for a school so identified and its LEA to take certain improvement actions. The SEA requests this waiver so that an LEA and its Title I schools need not comply with these requirements.
- ☒ 3. The requirements in ESEA section 1116(c) for an SEA to identify for improvement or corrective action, as appropriate, an LEA that, for two consecutive years or more, fails to make AYP, and for an LEA so identified and its SEA to take certain improvement actions. The SEA requests this waiver so that it need not comply with these requirements with respect to its LEAs.
- ☒ 4. The requirements in ESEA sections 6213(b) and 6224(c) that limit participation in, and use of funds under the Small, Rural School Achievement (SRSA) and Rural and Low Income School (RLIS) programs based on whether an LEA has made AYP and is complying with the requirements in ESEA section 1116. The SEA requests this waiver so that an LEA that receives SRSA or RLIS funds may use those funds for any authorized purpose regardless of whether the LEA makes AYP.
- ☒ 5. The requirement in ESEA section 1114(a)(1) that a school have a poverty percentage of 40 percent or more in order to operate a schoolwide program. The SEA requests this waiver so that an LEA may implement interventions consistent with the turnaround principles or interventions that are based on the needs of the students in the school and designed to enhance the entire educational program in a school in any of its priority and focus schools, as appropriate, even if those schools do not have a poverty percentage of 40 percent or more.
- ☒ 6. The requirement in ESEA section 1003(a) for an SEA to distribute funds reserved under that section only to LEAs with schools identified for improvement, corrective action, or restructuring. The SEA requests this waiver so that it may allocate section 1003(a) funds to its LEAs in order to serve any of the State's priority and focus schools.



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- ☒ 7. The provision in ESEA section 1117(c)(2)(A) that authorizes an SEA to reserve Title I, Part A funds to reward a Title I school that (1) significantly closed the achievement gap between subgroups in the school; or (2) has exceeded AYP for two or more consecutive years. The SEA requests this waiver so that it may use funds reserved under ESEA section 1117(c)(2)(A) for any of the State's reward schools.
- ☒ 8. The requirements in ESEA section 2141(a), (b), and (c) for an LEA and SEA to comply with certain requirements for improvement plans regarding highly qualified teachers. The SEA requests this waiver to allow the SEA and its LEAs to focus on developing and implementing more meaningful evaluation and support systems.
- ☒ 9. The limitations in ESEA section 6123 that limit the amount of funds an SEA or LEA may transfer from certain ESEA programs to other ESEA programs. The SEA requests this waiver so that it and its LEAs may transfer up to 100 percent of the funds it receives under the authorized programs among those programs and into Title I, Part A.
- ☒ 10. The requirements in ESEA section 1003(g)(4) and the definition of a Tier I school in Section I.A.3 of the School Improvement Grants (SIG) final requirements. The SEA requests this waiver so that it may award SIG funds to an LEA to implement one of the four SIG models in any of the State's priority schools.

Optional Flexibility:

An SEA should check the box below only if it chooses to request a waiver of the following requirements:

- ☒ The requirements in ESEA sections 4201(b)(1)(A) and 4204(b)(2)(A) that restrict the activities provided by a community learning center under the Twenty-First Century Community Learning Centers (21st CCLC) program to activities provided only during non-school hours or periods when school is not in session (i.e., before and after school or during summer recess). The SEA requests this waiver so that 21st CCLC funds may be used to support expanded learning time during the school day in addition to activities during non-school hours or periods when school is not in session.

**WAIVERS**

By submitting this flexibility request, the SEA requests flexibility through waivers of the ten ESEA requirements listed below and their associated regulatory, administrative, and reporting requirements by checking each of the boxes below. The provisions below represent the general areas of flexibility requested; a chart appended to the document titled *ESEA Flexibility Frequently Asked Questions* enumerates each specific provision of which the SEA requests a waiver, which the SEA incorporates into its request by reference.



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- ☒ 1. The requirements in ESEA section 1111(b)(2)(E)-(H) that prescribe how an SEA must establish annual measurable objectives (AMOs) for determining adequate yearly progress (AYP) to ensure that all students meet or exceed the State's proficient level of academic achievement on the State's assessments in reading/language arts and mathematics no later than the end of the 2013–2014 school year. The SEA requests this waiver to develop new ambitious but achievable AMOs in reading/language arts and mathematics in order to provide meaningful goals that are used to guide support and improvement efforts for the State, LEAs, schools, and student subgroups.
- ☒ 2. The requirements in ESEA section 1116(b) for an LEA to identify for improvement, corrective action, or restructuring, as appropriate, a Title I school that fails, for two consecutive years or more, to make AYP, and for a school so identified and its LEA to take certain improvement actions. The SEA requests this waiver so that an LEA and its Title I schools need not comply with these requirements.
- ☒ 3. The requirements in ESEA section 1116(c) for an SEA to identify for improvement or corrective action, as appropriate, an LEA that, for two consecutive years or more, fails to make AYP, and for an LEA so identified and its SEA to take certain improvement actions. The SEA requests this waiver so that it need not comply with these requirements with respect to its LEAs.
- ☒ 4. The requirements in ESEA sections 6213(b) and 6224(c) that limit participation in, and use of funds under the Small, Rural School Achievement (SRSA) and Rural and Low-Income School (RLIS) programs based on whether an LEA has made AYP and is complying with the requirements in ESEA section 1116. The SEA requests this waiver so that an LEA that receives SRSA or RLIS funds may use those funds for any authorized purpose regardless of whether the LEA makes AYP.
- ☒ 5. The requirement in ESEA section 1114(a)(1) that a school have a poverty percentage of 40 percent or more in order to operate a schoolwide program. The SEA requests this waiver so that an LEA may implement interventions consistent with the turnaround principles or interventions that are based on the needs of the students in the school and designed to enhance the entire educational program in a school in any of its priority and focus schools that meet the definitions of "priority schools" and "focus schools," respectively, set forth in the document titled *ESEA Flexibility*, as appropriate, even if those schools do not have a poverty percentage of 40 percent or more.
- ☒ 6. The requirement in ESEA section 1003(a) for an SEA to distribute funds reserved under that section only to LEAs with schools identified for improvement, corrective action, or restructuring. The SEA requests this waiver so that it may allocate section 1003(a) funds to its LEAs in order to serve any of the State's priority and focus schools that meet the definitions of "priority schools" and "focus schools," respectively, set forth in the document titled *ESEA Flexibility*.



- ☒ 7. The provision in ESEA section 1117(c)(2)(A) that authorizes an SEA to reserve Title I, Part A funds to reward a Title I school that (1) significantly closed the achievement gap between subgroups in the school; or (2) has exceeded AYP for two or more consecutive years. The SEA requests this waiver so that it may use funds reserved under ESEA section 1117(c)(2)(A) for any of the State's reward schools that meet the definition of "reward schools" set forth in the document titled *ESEA Flexibility*.
- ☒ 8. The requirements in ESEA section 2141(a), (b), and (c) for an LEA and SEA to comply with certain requirements for improvement plans regarding highly qualified teachers. The SEA requests this waiver to allow the SEA and its LEAs to focus on developing and implementing more meaningful evaluation and support systems.
- ☒ 9. The limitations in ESEA section 6123 that limit the amount of funds an SEA or LEA may transfer from certain ESEA programs to other ESEA programs. The SEA requests this waiver so that it and its LEAs may transfer up to 100 percent of the funds it receives under the authorized programs among those programs and into Title I, Part A.
- ☒ 10. The requirements in ESEA section 1003(g)(4) and the definition of a Tier I school in Section I.A.3 of the School Improvement Grants (SIG) final requirements. The SEA requests this waiver so that it may award SIG funds to an LEA to implement one of the four SIG models in any of the State's priority schools that meet the definition of "priority schools" set forth in the document titled *ESEA Flexibility*.

*Optional Flexibilities:*

If an SEA chooses to request waivers of any of the following requirements, it should check the corresponding box(es) below:

- ☒ 11. The requirements in ESEA sections 4201(b)(1)(A) and 4204(b)(2)(A) that restrict the activities provided by a community learning center under the Twenty-First Century Community Learning Centers (21st CCLC) program to activities provided only during non-school hours or periods when school is not in session (i.e., before and after school or during summer recess). The SEA requests this waiver so that 21st CCLC funds may be used to support expanded learning time during the school day in addition to activities during non-school hours or periods when school is not in session.
- ☒ 12. The requirements in ESEA sections 1116(a)(1)(A)-(B) and 1116(c)(1)(A) that require LEAs and SEAs to make determinations of adequate yearly progress (AYP) for schools and LEAs, respectively. The SEA requests this waiver because continuing to determine whether an LEA and its schools make AYP is inconsistent with the SEA's State-developed differentiated recognition, accountability, and support system included in its ESEA flexibility request. The SEA and its LEAs must report on their report cards performance against the AMOs for all subgroups identified in ESEA section 1111(b)(2)(C)(v), and use performance against the AMOs to support continuous improvement in Title I schools that are not reward schools, priority schools, or focus schools.



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☒ 13. The requirements in ESEA section 1113(a)(3)-(4) and (c)(1) that require an LEA to serve eligible schools under Title I in rank order of poverty and to allocate Title I, Part A funds based on that rank ordering. The SEA requests this waiver in order to permit its LEAs to serve a Title I-eligible high school with a graduation rate below 60 percent that the SEA has identified as a priority school even if that school does not rank sufficiently high to be served.



**ASSURANCES**

By submitting this application, the SEA assures that:

- ☒ 1. It requests waivers of the above-referenced requirements based on its agreement to meet Principles 1 through 4 of the flexibility, as described throughout the remainder of this request.
- ☒ 2. It will adopt English language proficiency (ELP) standards that correspond to the State's college- and career-ready standards, consistent with the requirement in ESEA section 3113(b)(2), and that reflect the academic language skills necessary to access and meet the new college- and career-ready standards, no later than the 2013–2014 school year. (Principle 1)
- ☒ 3. It will develop and administer no later than the 2014–2015 school year alternate assessments based on grade-level academic achievement standards or alternate assessments based on alternate academic achievement standards for students with the most significant cognitive disabilities that are consistent with 34 C.F.R. § 200.6(a)(2) and are aligned with the State's college- and career-ready standards. (Principle 1)
- ☒ 4. It will develop and administer ELP assessments aligned with the State's ELP standards, consistent with the requirements in ESEA sections 1111(b)(7), 3113(b)(2), and 3122(a)(3)(A)(ii). (Principle 1)
- ☒ 5. It will report annually to the public on college-going and college credit-accumulation rates for all students and subgroups of students in each LEA and each public high school in the State. (Principle 1)
- ☒ 6. If the SEA includes student achievement on assessments in addition to reading/language arts and mathematics in its differentiated recognition, accountability, and support system and uses achievement on those assessments to identify priority and focus schools, it has technical documentation, which can be made available to the Department upon request, demonstrating that the assessments are administered statewide; include all students, including by providing appropriate accommodations for English Learners and students with disabilities, as well as alternate assessments based on grade-level academic achievement standards or alternate assessments based on alternate academic achievement standards for students with the most significant cognitive disabilities, consistent with 34 C.F.R. § 200.6(a)(2); and are valid and reliable for use in the SEA's differentiated recognition, accountability, and support system. (Principle 2)
- ☒ 7. It will report to the public its lists of reward schools, priority schools, and focus schools at the time the SEA is approved to implement the flexibility, and annually thereafter, it will publicly recognize its reward schools. (Principle 2)



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- ☒ 8. Prior to submitting this request, it provided student growth data on their current students and the students they taught in the previous year to, at a minimum, teachers of reading/language arts and mathematics in grades in which the State administers assessments in those subjects in a manner that is timely and informs instructional programs, or it will do so no later the deadline required under the State Fiscal Stabilization Fund. (Principle 3)
- ☒ 9. It will evaluate and, based on that evaluation, revise its own administrative requirements to reduce duplication and unnecessary burden on LEAs and schools. (Principle 4)
- ☒ 10. It has consulted with its Committee of Practitioners regarding the information set forth in its request.
- ☒ 11. Prior to submitting this request, it provided all LEAs with notice and a reasonable opportunity to comment on the request and has attached a copy of that notice (Attachment 1) as well as copies of any comments it received from LEAs (Attachment 2).
- ☒ 12. Prior to submitting this request, it provided notice and information regarding the request to the public in the manner in which the State customarily provides such notice and information to the public (*e.g.*, by publishing a notice in the newspaper; by posting information on its website) and has attached a copy of, or link to, that notice (Attachment 3).
- ☒ 13. It will provide to the Department, in a timely manner, all required reports, data, and evidence regarding its progress in implementing the plans contained throughout this request.

**If the SEA selects Option A or B in section 3.A of its request, indicating that it has not yet developed and adopted all guidelines for teacher and principal evaluation and support systems, it must also assure that:**

- ☒ 14. It will submit to the Department for peer review and approval a copy of the guidelines that it will adopt by the end of the 2011–2012 school year. (Principle 3)



## CONSULTATION

An SEA must meaningfully engage and solicit input from diverse stakeholders and communities in the development of its request. To demonstrate that an SEA has done so, the SEA must provide an assurance that it has consulted with the State's Committee of Practitioners regarding the information set forth in the request and provide the following:

*Please note: The following is part of an ongoing list of consultation that the Idaho State Department of Education (ISDE) is conducting throughout this process. The ~~ISDE Idaho State Department of Education~~ systematically engaged and solicited extensive, comprehensive input from stakeholders and communities before, during, and after the development of its waiver application.*

1. A description of how the SEA meaningfully engaged and solicited input on its request from teachers and their representatives.

The ~~Idaho State Department of Education~~ ISDE meaningfully engaged and solicited input from teachers and their representatives throughout the process of applying for ESEA Flexibility, using focus groups, stakeholder meetings and a public website.

The Department used a series of both face-to-face and web-based strategies to gather feedback from a diverse group of stakeholders across the State of Idaho. All stakeholders in the State of Idaho – parents, teachers, administrators, board trustees, community groups, civil rights organizations, business representatives, higher education, and others – had an opportunity to offer initial ideas and then to provide feedback on the state's draft waiver.

The following chart outlines the meetings the State conducted and specifies which meetings were conducted in person and which feedback was gathered online.



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**Consultation Plan to Engage Stakeholders**  
Key Activities/Timeline/Staff Responsible

<b><u>Key Activity</u></b>	<b><u>Due Date</u></b>	<b><u>Staff Responsible</u></b>	<b><u>Strategy for Outreach</u></b>
Sent news release to members, media, and education stakeholders, including superintendents and principals, about Idaho's plan to apply for ESEA Flexibility.	September 23, 2011	Melissa McGrath	<a href="#">Online</a>
Posted preliminary information about waiver on social media outlets, including the Idaho State Department of Education's Facebook page, Twitter account and blog.	September 23, 2011	Melissa McGrath	<a href="#">Online</a>
Held five focus groups with key educational stakeholder groups to gather initial ideas and input on Idaho's application for ESEA Flexibility. Focus groups included members of the Idaho State Board of Education, legislators, parents, business leaders, community members, <u>and</u> representatives of <u>the</u> Idaho School Boards Association, Idaho Association of School Administrators, Idaho Education Association, Northwest Professional Educators and Idaho Commission on Hispanic Affairs.	October 19-20, 2011	Melissa McGrath Carissa Miller Steve Underwood	<a href="#">Face-to-face</a>
Idaho Superintendent of Public Instruction Tom Luna provided an update on Idaho's efforts to apply for ESEA Flexibility at the State Board of Education meeting. He encouraged Board members to provide initial input.	October 20, 2011	Superintendent Luna Luci Willits	<a href="#">Face-to-face</a>
Sent an email directly to State Board members asking them questions about the ESEA Flexibility application to gather additional feedback.	October 25, 2011	Melissa McGrath	<a href="#">Online</a>



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<b><u>Key Activity</u></b>	<b><u>Due Date</u></b>	<b><u>Staff Responsible</u></b>	<b><u>Strategy for Outreach</u></b>
Sent a news release to the media, superintendents, focus group participants and leaders of educational stakeholder groups in Idaho announcing the creation of a website to gather initial input on Idaho's application for ESEA Flexibility.	November 10, 2011	Melissa McGrath Brenda Mattson	<a href="#">Online</a>
Idaho Superintendent of Public Instruction Tom Luna provided an update on Idaho's efforts to apply for ESEA Flexibility at the State Board of Education meeting. He encouraged their feedback and input on the application.	December 8, 2011	Superintendent Luna Luci Willits	<a href="#">Face-to-face</a>
As a follow-up to the State Board meeting in December, Superintendent Luna sent an email directly to State Board members asking them questions about Idaho's plans to apply for ESEA Flexibility and to gather their feedback.	December 13, 2011	Superintendent Luna	<a href="#">Online</a>
<a href="#">ISDE staff attended the</a> Accountability Oversight Committee (subcommittee of the Idaho State Board of Education) <del>—and</del> presented waiver components, discussed concerns at formal meeting.	December 21, 2011	Carissa Miller Steve Underwood	<a href="#">Face-to-face</a>
<a href="#">Met with the Stakeholders</a> <del>e</del> Executive <del>d</del> Directors of key <a href="#">stakeholder groups</a> (Idaho School Boards Association, Idaho Association of School Administrators, Idaho Education Association) <del>to</del> <del>—present</del> <a href="#">the draft waived plan</a> and received feedback.	January 6, 2012	Carissa Miller Steve Underwood	<a href="#">Face-to-face</a>
<a href="#">The</a> Accountability Oversight Committee was asked to provide	January 9, 2012	Carissa Miller Scott Grothe	<a href="#">Online</a>



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<b><u>Key Activity</u></b>	<b><u>Due Date</u></b>	<b><u>Staff Responsible</u></b>	<b><u>Strategy for Outreach</u></b>
additional feedback <u>after the entire document draft waiver was</u> released to public.			
Published a draft of Idaho's application for ESEA Flexibility on the Idaho State Department of Education website and sent a link with an executive summary to superintendents, principals, State Board members and leaders of educational stakeholder groups in Idaho.	January 9, 2012	Melissa McGrath Brenda Mattson	<u>Online</u>
Sent a news release to members of the media announcing a draft of Idaho's application for ESEA Flexibility is published and available for public comment until February 01, 2012.	January 10, 2012	Melissa McGrath	<u>Online</u>
Posted an announcement that Idaho's draft application for ESEA Flexibility is now available for public comment on social media outlets, including the Idaho State Department of Education's Facebook page, Twitter account and blog.	January 10, 2012	Melissa McGrath Travis Drake	<u>Online</u>
<u>ISDE staff attended the</u> Statewide System of Support/Capacity Builders Spring Conference <u>—and</u> presented waiver components to external school improvement coaches that work with Title I districts and schools in improvement. <u>At this meeting, ISDE staff,</u> encouraged public comment and took feedback	January 11, 2012	Carissa Miller	<u>Face-to-face</u>



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<b><u>Key Activity</u></b>	<b><u>Due Date</u></b>	<b><u>Staff Responsible</u></b>	<b><u>Strategy for Outreach</u></b>
Idaho Superintendent of Public Instruction Tom Luna held a conference call with all district superintendents and the leaders of the Idaho Association of School Administrators <del>—where he</del> provided an overview of Idaho’s draft application for ESEA Flexibility and encouraged superintendents to provide feedback.	January 12, 2012	Superintendent Luna Melissa McGrath	<a href="#">Online Conference call</a>
<del>The</del> Indian Education Committee met and <del>was</del> provided access to the ESEA Flexibility Waiver Draft as well as the Executive Summary. Members included this in their meeting agenda and were encouraged to give individual feedback on the website. The committee decided to have the opportunity to give input as a group. Bryan Samuels, Chair, provided a letter prior to the end of the comment period to the ISDE.	January 12, 2012	Marcia Beckman	<a href="#">Face-to-face</a>
Superintendent Luna spoke to an estimated 70 Idaho secondary principals at the Idaho Association of Secondary School Principals – <del>where he</del> provided an overview of Idaho’s draft application for ESEA Flexibility and encouraged principals to provide feedback.	January 16, 2012	Superintendent Luna Melissa McGrath	<a href="#">Face-to-face</a>
<del>ISDE staff hosted</del> Held a webinar with superintendents, district-level administrators and the leaders of educational stakeholder groups to go over the details of Idaho’s draft application for ESEA Flexibility <del>and answer questions.</del> Fifty-five (55) districts participated.	January 18, 2012	Carissa Miller Steve Underwood Christina Linder Melissa McGrath	<a href="#">Online Webinar</a>



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<u>Key Activity</u>	<u>Due Date</u>	<u>Staff Responsible</u>	<u>Strategy for Outreach</u>
<p><del>ISDE staff presented to the in person and webinar presentation provided for</del> Special Education Advisory Panel (SEAP) <u>in person and via webinar meeting. The panel includes</u> <del>Included</del> members and representatives from the following groups:</p> <ul style="list-style-type: none"> <li>• <u>Boise State University: COE</u></li> <li>• <u>ID Juvenile Corrections Center - Nampa</u></li> <li>• <u>Idaho State University: COE</u></li> <li>• <u>Idaho Dept. of Correction</u></li> <li>• <u>Idaho State Correctional Institution</u></li> <li>• <u>Easter Seals-Goodwill</u></li> <li>• <u>University of Idaho: COE</u></li> <li>• <u>Idaho Division of Vocational Rehabilitation (IDVR)</u></li> <li>• <u>Idaho Council on Developmental Disabilities</u></li> <li>• <u>Northwest Children's Home - Treasure Valley</u></li> <li>• <u>Dept. of Health &amp; Welfare</u></li> <li>• <u>Casey Family Programs</u></li> <li>• <u>Disability Rights Idaho (DRI), and</u></li> <li>• <u>Idaho Parents Unlimited (IPUL)</u></li> <li>• <del>Boise State University: COE</del></li> <li><del>ID Juvenile Corrections Center - Nampa</del></li> <li><del>Idaho State University: COE</del></li> <li><del>Idaho Dept. of Correction</del></li> <li><del>Idaho State Correctional Institution</del></li> <li><del>Easter Seals-Goodwill</del></li> <li><del>University of Idaho: COE</del></li> <li><del>Idaho Division of Vocational Rehabilitation (IDVR)</del></li> <li><del>Idaho Council on Developmental</del></li> </ul>	January 19, 2012	Richard Henderson	<u>Face-to-face</u> <u>Online</u>



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<u>Key Activity</u>	<u>Due Date</u>	<u>Staff Responsible</u>	<u>Strategy for Outreach</u>
<del>Disabilities Northwest Children's Home—Treasure Valley Dept. of Health &amp; Welfare Casey Family Programs Disability Rights Idaho (DRI), and Idaho Parents Unlimited (IPUL)</del>			
<u>ISDE staff c</u> onsulted with the <u>Idaho</u> Commission on Hispanic Affairs, regarding the details of Idaho's waiver application.	January 26, 2012	Wendy St. Michell Carissa Miller	<u>Face-to-face</u>
<u>ISDE staff p</u> osted an announcement regarding the waiver to Idaho's Title III Directors, asking for review and feedback.	January 31, 2012	Fernanda Brendefur	<u>Online</u>
<u>ISDE staff presented to members of the Presentation at the</u> Idaho Association of Bilingual Education regarding Idaho's waiver application and English Learners.	February 3, 2012	Fernanda Brendefur	<u>Face-to-face</u>

- A description of how the SEA meaningfully engaged and solicited input on its request from other diverse communities, such as students, parents, community-based organizations, civil rights organizations, organizations representing students with disabilities and English Learners, business organizations, and Indian tribes.

Here is a new chart specifically outlining all the meetings that ISDE staff held both in-person or online with representatives of diverse stakeholder groups to gather feedback and input on the State's waiver application.



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<u>Key Activity with Diverse Stakeholder Group</u>	<u>Due Date</u>	<u>Staff Responsible</u>	<u>Strategy for Outreach</u>
<u>Held five focus groups with key educational stakeholder groups to gather initial ideas and input on Idaho's application for ESEA Flexibility. The focus groups included members of the Idaho State Board of Education, legislators, parents, business leaders, community members, representatives of Idaho School Boards Association, Idaho Association of School Administrators, Idaho Education Association, Northwest Professional Educators and Idaho Commission on Hispanic Affairs. A member of the tribes was invited but could not attend.</u>	<u>October 19-20, 2011</u>	<u>Melissa McGrath Carissa Miller Steve Underwood</u>	<u>Face-to-face</u>
<u>ISDE staff met with the Stakeholders-Executive Directors of key stakeholder groups (Idaho School Boards Association, Idaho Association of School Administrators, Idaho Education Association) —to present the draft waiver and presented plan and received feedback.</u>	<u>January 6, 2012</u>	<u>Carissa Miller Steve Underwood</u>	<u>Face-to-face</u>
<u>ISDE staff presented at the Statewide System of Support/Capacity Builders Spring Conference, speaking about —presented waiver components to external school improvement coaches that work with Title I districts and schools in improvement and encouraging their, encouraged public comment and took feedback.</u>	<u>January 11, 2012</u>	<u>Carissa Miller</u>	<u>Face-to-face</u>
<u>Idaho Superintendent of Public Instruction Tom Luna held a conference call with all district superintendents and the leaders of the Idaho Association of School Administrators —where he provided an overview of Idaho's draft application for ESEA Flexibility and encouraged superintendents to provide feedback.</u>	<u>January 12, 2012</u>	<u>Superintendent Luna Melissa McGrath</u>	<u>Online Conference call</u>



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<b><u>Key Activity with Diverse Stakeholder Group</u></b>	<b><u>Due Date</u></b>	<b><u>Staff Responsible</u></b>	<b><u>Strategy for Outreach</u></b>
<u>The Indian Education Committee met and was provided access to the ESEA Flexibility Waiver Draft as well as the Executive Summary. Members included this in their meeting agenda and were encouraged to give individual feedback on the website. The committee decided to have the opportunity to give input as a group. Bryan Samuels, Chair, provided a letter prior to the end of the comment period to the ISDE.</u>	<u>January 12, 2012</u>	<u>Marcia Beckman</u>	<u>Face-to-face</u>
<u>Superintendent Luna spoke to an estimated 70 Idaho secondary principals at the Idaho Association of Secondary School Principals – where he provided an overview of Idaho’s draft application for ESEA Flexibility and encouraged principals to provide feedback.</u>	<u>January 16, 2012</u>	<u>Superintendent Luna Melissa McGrath</u>	<u>Face-to-face</u>
<u>ISDE staff hosted Held a webinar with superintendents, district-level administrators and the leaders of educational stakeholder groups to go over the details of Idaho’s draft application for ESEA Flexibility. Fifty-five (55) districts participated.</u>	<u>January 18, 2012</u>	<u>Carissa Miller Steve Underwood Christina Linder Melissa McGrath</u>	<u>Online Webinar</u>
<u>ISDE staff presented to the Special Education Advisory Panel (SEAP) in person and via webinar. The panel includes members and representatives from the following groups: In-person and webinar presentation provided for Special Education Advisory Panel (SEAP) meeting. Included members and representatives from the following groups:</u> <ul style="list-style-type: none"> <li>• <u>Boise State University: COE</u></li> <li>• <u>ID Juvenile Corrections Center - Nampa</u></li> <li>• <u>Idaho State University: COE</u></li> <li>• <u>Idaho Dept. of Correction</u></li> <li>• <u>Idaho State Correctional Institution</u></li> <li>• <u>Easter Seals-Goodwill</u></li> <li>• <u>University of Idaho: COE</u></li> <li>• <u>Idaho Division of Vocational Rehabilitation (IDVR)</u></li> </ul>	<u>January 19, 2012</u>	<u>Richard Henderson</u>	<u>Face-to-face Online</u>



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<ul style="list-style-type: none"> <li>• <a href="#">Idaho Council on Developmental Disabilities</a></li> <li>• <a href="#">Northwest Children's Home - Treasure Valley</a></li> <li>• <a href="#">Dept. of Health &amp; Welfare</a></li> <li>• <a href="#">Casey Family Programs</a></li> <li>• <a href="#">Disability Rights Idaho (DRI), and</a></li> <li>• <a href="#">Idaho Parents Unlimited (IPUL)</a></li> </ul>			
<a href="#">ISDE staff c</a> <a href="#">onsulted with the Idaho Commission on Hispanic Affairs, regarding the details of Idaho's waiver application.</a>	<a href="#">January 26, 2012</a>	<a href="#">Wendy St. Michell</a> <a href="#">Carissa Miller</a>	<a href="#">Face-to-face</a>
<a href="#">ISDE staff p</a> <a href="#">osted an announcement regarding the waiver to Idaho's Title III Directors, asking for review and feedback.</a>	<a href="#">January 31, 2012</a>	<a href="#">Fernanda Brendefur</a>	<a href="#">Online</a>
<a href="#">ISDE staff presented to members of the Presentation at the Idaho Association of Bilingual Education regarding Idaho's waiver application and English Learners.</a>	<a href="#">February 3, 2012</a>	<a href="#">Fernanda Brendefur</a>	<a href="#">Face-to-face</a>

First, the ~~Department~~ [ISDE](#) held focus group discussions with five key stakeholder groups on October 19 and October 20, 2011. Each focus group consisted of six to eight individuals and lasted about 1 hour and 15 minutes. The focus group was led by an independent, third party who reviewed the waiver process and then asked for ideas and input on each section. ISDE staff was on hand to answer clarifying questions, take notes, and audio record each meeting. Each focus group consisted of community members (parents, legislators, community groups, and business community), school board trustees, local superintendents, and district-level administrators, teachers and principals, and State Board of Education members. Key educational stakeholder groups – the Idaho Education Association, the Idaho Association of School Administrators, the Idaho School Boards Association, and the Idaho Commission on Hispanic Affairs – selected participants for these focus groups.

Second, ISDE staff met with the leaders of key educational stakeholder groups, including the Idaho Education Association, the Idaho Association of School Administrators, and the Idaho School Boards Association, to gather their initial ideas and input before developing the waiver application. In addition, as a follow up to the focus group, the ~~Department~~ [ISDE](#) sent the members of the Idaho State Board of Education a list of questions about the waiver application to seek further feedback and input. ISDE staff met with the leaders of the stakeholder groups again on January 6, 2012 to review a draft of the waiver application before it was published for public comment.

Third, the ISDE built a public comment website to seek ongoing input from teachers, school administrators, parents and others in the community. The public website was advertised to Idaho's public schools and school districts through the state's Weekly E-Newsletter, e-mails to superintendents, e-mails to the leaders of key educational stakeholder groups, and e-mails to focus group participants. The public website was advertised to the public through a news



release, newspaper stories and briefs, and the ISDE's social media outlets (Facebook, Twitter, and blog).

Fourth, the ISDE published a draft of its waiver application on January 9, 2012. The waiver application was posted on the ISDE website at [www.sde.idaho.gov](http://www.sde.idaho.gov) and a copy was e-mailed to the following: district superintendents, school principals, district test coordinators, district federal program managers, Idaho Education Association executive director, Idaho Association of School Administrators executive director, Idaho School Boards Association executive director, Idaho Commission on Hispanic Affairs executive director, State Board of Education members, House and Senate Education Committee members, and participants of the focus groups. The ISDE opened an official public comment period of at least 21 days and requested public comments on the ISDE website or via fax or mail to give all stakeholders and the public an opportunity to comment on the draft application. Twenty-one days is the same period of time the Idaho State Board of Education allows for public comment on all administrative rules. The ISDE advertised the draft application and 21-day public comment period to educators in the state's Weekly E-Newsletter, e-mails to superintendents and school district administrators, e-mails to the leaders of key educational stakeholder groups, and e-mails to focus group participants. The ISDE advertised the draft application and 21-day public comment period to the public through a news release, newspaper stories and briefs, and the ~~Department's~~ ISDE's social media outlets (Facebook, Twitter, and blog).

The waiver application was reviewed by the Idaho Committee of Practitioners and the Special Education Advisory Panel (SEAP) and was sent to all Title III directors. ISDE reviewed all comments received through the online website and via letters and emails through February 2. Based upon suggestion received through the public comments, ISDE revised the waiver application and addressed all concerns.

All comments, stakeholder groups and ISDE response to each can be found in Attachment 2. The specific changes enlisted in the original submission of the waiver include the following items although some of these changes have been modified due to further negotiations with the U.S. Department of Education (US ED):

1. ISDE ~~is~~ propos~~ed~~ing to remove LEP1, LEP2 and LEP3 students from the achievement category. LEP1 students (students new to the U.S. for the first year) are already exempted from those calculations. ISDE ~~is~~ propos~~ed~~ing to exempt those same students in their second and third year new to the U.S. while they are still learning the language. However, LEP2 and LEP3 students would ~~have~~ -still-been required to test and ~~are~~ would have been included in the growth ~~-to-~~ achievement and growth ~~-to-~~ achievement subgroups categories. The growth ~~-to-~~ achievement measures ensured d schools would have these students on track to meet proficiency in three years or 10<sup>th</sup> grade, whichever comes first.
2. The growth matrix has been adjusted. This new matrix accounts the actual data of the schools in Idaho and lessens the student growth percentile requirements for those schools whose students are meeting their average growth expectations.



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3. The overall star rating point span has been adjusted. There are approximately 5% of schools classified as One Star, 10% as Two Star, and 5% as Five Star with the rest distributed across Three and Four Stars.
4. Required set asides for professional development have been reduced from 20% to 10%.
5. A special provision has been made based on public comment relating to One-Star Schools on or near tribal lands and which serve a large number of Native American students. The district and school will need to demonstrate that they are continuously engaging and seeking input from the tribal community. This will be embedded in the Turnaround Plan process.
6. ~~The parameters of STS (tutoring) have been defined so that districts may budget for it in advance in order to help with early reduction of any unused set aside. This definition is in Section 2.A.i. under the STS heading. Essentially, the ISDE is focusing on the delivery of the service (2 hours per week for 28 weeks with early exit being a choice of the parent) rather than spending a set amount of funds. Therefore, districts will be able to reduce the set aside amount as soon as they have a contract in place with a sole source vendor or have otherwise established the service for students and can document that there will be unused funds.~~
7. ~~Eligibility for Choice and STE has been revised to be the same in One Star Schools as in Two Star Schools. Eligibility in both categories is solely based on academic need, but permits for prioritization.~~
8. ~~The design of STS has been clarified. While a list of options is not required, One and Two Star schools and districts must utilize an external provider of its choosing, if one is available, to deliver STS. If a provider that aligns with the district and school improvement plan does not exist, the district may provide STS itself, with the approval of ISDE.~~
- 9.6. There will be a one-year transition period between the consequences of the previous accountability system and the new system. In the meantime, a transition plan has been outlined in Section 2.A.i. under the description of the WISE Tool, along with transitional statements regarding how the new requirements for Student and Family Support Options definitions of STS and School Choice may be used for 2012-13 if the waiver is approved will be implemented.
- 10.7. ISDE clarified that the Universal Design for Learning (UDL) ~~UDL~~ lesson plans were not a requirement for school districts but more clearly described the model lesson plans that teachers may submit as statewide models to be placed in Schoolnet.
- 11.8. ISDE ~~will not~~ has submitted a list of the schools and their star ratings as required in the waiver. ~~Instead, ISDE will build~~ an application similar to the AYP appeals site and provide districts the opportunity to view and appeal any data related to the star rating in Summer 2012. Once this process is completed, Idaho will submit the final list to US ED.



12.9. ISDE clarified that the waiver application does not require two evaluations annually but rather suggests that policy will be revised to require that novice or partially proficient teachers be observed at least twice annually, and that all other staff shall submit to, at least, two formative observations and/or evaluative discussions within the school year. These observations and evaluative discussions shall be used as data in completing the teacher's one evaluation as is outlined and required by State Statute 33-514.

The Idaho State Board of Education ~~will~~ reviewed the full original application and voted on its approval during its February 2012 meeting. Once negotiations are finalized with US ED, the Idaho State Board of Education will once again review and vote on the approval of this waiver.

The ISDE has demonstrated a great depth of outreach to a diverse group of stakeholders throughout this process. First, we spoke with stakeholder groups before creating the waiver application to gain initial ideas and input. Second, we asked for their feedback throughout the writing of the waiver application. Third, we published a draft of the state's waiver application online before submitting it to US ED the U.S. Department of Education and held a month-long public comment period. In Attachment 2, ISDE included a comprehensive chart, titled "Public Comments for Suggested Change and ISDE Response."

This chart details every comment or statement and the ISDE's response to the concerns that stakeholder groups and individuals voiced throughout the process. All subsequent letters in Attachment 2 are addressed in this chart. We made significant changes to the State's waiver application based on the feedback and comments we received throughout this process.

Our outreach efforts have continued even after submitting the application to the U.S. Department of Education-US ED for review. We have met with more than 800 individuals – the leaders of key stakeholders groups and local school districts – since submitting the application in February. (See "Continued Consultation to Engage Stakeholders" table.)



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**Continued Consultation to Engage Stakeholders**

<b><u>Key Activity</u></b>	<b><u>Estimated Audience<sup>1</sup></u></b>	<b><u>Staff Responsible</u></b>	<b><u>Strategy for Outreach</u></b>
Idaho State Superintendents Association Conference	30	Nick Smith, Steve Underwood, Carissa Miller	Face-to-face
Region 3 Superintendents Meeting	30	Carissa Miller	Face-to-face
Region 5 Superintendents Meeting	20	Nick Smith	Face-to-face
Region 4 K-12 Principals Meeting	40	Steve Underwood	Face-to-face
Region 6 Secondary Principals Meeting	9	Nick Smith	Face-to-face
Canyon-Owyhee School Service Agency (COSSA) Schools staff	8	Nick Smith	Face-to-face
Nampa School District Leadership Team <sup>2</sup>	12	Nick Smith	Face-to-face
Mountain Home School District Leadership Team and Principals <sup>3</sup>	23	Nick Smith	Face-to-face
Idaho Public Charter School Commission	7 commissioners, 18 audience members	Nick Smith	Face-to-face
Idaho Superintendents Network	31	Nick Smith Steve Underwood	Face-to-face
Post-Legislative Tour Meetings in 6 regions across Idaho <sup>4</sup>	600	Nick Smith	Face-to-face
FAQ Follow up meeting with Region 3 Superintendents	30	Nick Smith	Face-to-face
Southern Idaho Conference Superintendents	10	Carissa Miller	Face-to-face
Accountability Oversight Committee, Idaho State Board of Education	5 members, 2 staff	Carissa Miller	Face-to-face
Senate Education Committee	9 senators, plus audience	Carissa Miller	Face-to-face Online (streamed live)
League of Schools	20	Carissa Miller	Conference Call
Idaho Education Association Board	35	Nick Smith	Face-to-face
Twin Falls School District In-service Days	45	Nick Smith	Face-to-face

<sup>1</sup> The ISDE estimates the audience was much larger than this direct audience of more than 800 people. We have directly reached out to leaders of educational stakeholder groups and leadership teams within local school districts who have now distributed this information to those in their organizations and districts.

<sup>2</sup> The Nampa School District represents one Idaho's largest and most diverse school districts.

<sup>3</sup> The Mountain Home School District represents an average sized but diverse school district in Idaho.

<sup>4</sup> The Post Legislative Tour participants included, superintendents, principals, federal program directors, special education directors, business managers, school board members, teachers, policy makers and members of the media.



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ISDE plans to continue this high level of outreach throughout the next year, with key meetings such as the Annual Superintendents' Meeting on July 31, 2012; Idaho Association of School Administrators Joint Divisional Conference on August 1-3, 2012, with superintendents, principals and special education directors; and the Idaho School Boards Association Annual Conference in November 14-16, 2012, with superintendents and school board trustees.



## EVALUATION

The Department encourages an SEA that receives approval to implement the flexibility to collaborate with the Department to evaluate at least one program, practice, or strategy the SEA or its LEAs implement under principle 1, 2, or 3. Upon receipt of approval of the flexibility, an interested SEA will need to nominate for evaluation a program, practice, or strategy the SEA or its LEAs will implement under principles 1, 2, or 3. The Department will work with the SEA to determine the feasibility and design of the evaluation and, if it is determined to be feasible and appropriate, will fund and conduct the evaluation in partnership with the SEA, ensuring that the implementation of the chosen program, practice, or strategy is consistent with the evaluation design.

☐ Check here if you are interested in collaborating with the Department in this evaluation, if your request for the flexibility is approved.



## OVERVIEW OF SEA'S REQUEST FOR THE ESEA FLEXIBILITY

Provide an overview (about 500 words) of the SEA's request for the flexibility that:

1. explains the SEA's comprehensive approach to implement the waivers and principles and describes the SEA's strategy to ensure this approach is coherent within and across the principles; and
2. describes how the implementation of the waivers and principles will enhance the SEA's and its LEAs' ability to increase the quality of instruction for students and improve student achievement.

In 2009, representatives of every educational stakeholder group, the [Idaho](#) State Department of Education ([ISDE](#)), the Governor's Office, and representatives of the business community formed the Education Alliance of Idaho. For two years, this group had worked together to develop a roadmap for improving public education in Idaho. Everyone recognized a need for change. While Idaho has one of the highest high school graduation rates in the country, we have one of lowest rates of students going on to and completing postsecondary education. To compete in the 21<sup>st</sup> Century global economy, the [S](#)tate recognized certain policies needed to change. They created a vision statement to make Idaho a global leader, providing high-quality, cost effective education to its citizens. It also developed several goals related to transparent accountability, high standards, postsecondary credit in high school, and postsecondary preparation, participation and completion. With the unveiling of this plan, Idaho had a clear path to improving its education system.

Back then, it was clear the current education system was not flexible enough to change and accomplish these goals. Idaho Superintendent of Public Instruction Tom Luna strongly believed it was the responsibility of the [S](#)tate and all educational stakeholders to follow through in implementing the Alliance's work to ensure every student graduates from high school and not only goes on to postsecondary education but does not need remediation once they get there.

Not only did the [S](#)tate have to change its laws and policies, but Idaho also needed a new accountability system – a system that provides better measures of student achievement and more meaningful forms of technical assistance for schools and every student population.

In 2011, Idaho reformed its public education system to meet the goals and vision of the Education Alliance of Idaho and make sure every student graduates from high school college- and career-ready. The Students Come First laws are rooted in the higher Common Core State Standards. With this foundation, the state is now creating 21st Century Classrooms in every school, ensuring every student has equal access to highly effective teaching and the best educational opportunities, and giving families immediate access to understandable information about their child's school. Specifically, through these laws, Idaho is making historic investments in classroom technology, implementing pay-for-performance for teachers, tying performance evaluations to student growth measures, providing unprecedented funding for professional development, expanding digital learning, and paying for every high school junior to take a college entrance exam.



Now that these laws are in place and Idaho is reforming its public schools to better meet students' needs in the 21<sup>st</sup> Century, the Sstate must have a new accountability system that is in line with these efforts. Idaho has developed its new system of increased accountability to align with ~~the~~ Students Come First, holding schools to a high standard by using multiple measures of student achievement including academic growth. Under this system, Idaho will still maintain one system of accountability for all schools – both Title I and non-Title I schools – to ensure the needs of all students are met.

The new accountability plan rates schools based on a five-star scale rather than Adequate Yearly Progress to give parents, patrons, and educators an accurate and meaningful measurement of school performance statewide. Five-Star and Four-Star Schools will be publicly recognized and shown as examples to other schools across the Sstate. One-Star and Two-Star Schools will receive intensive technical assistance and oversight from the State. Staff and leaders in the school would be held accountable for the achievement of all students.

Idaho's new accountability system also provides multiple measures of student achievement to more accurately assess how a school or district is performing. Schools are measured on proficiency, academic growth, academic growth to proficiency targets, and metrics of postsecondary and career-readiness. Through this system, the Sstate is finally able to measure academic growth in schools, rather than only proficiency. Academic growth is a critical measure in the performance of a school, whether a student is struggling to reach proficiency or has already reached proficiency and needs more advanced opportunities.

The new system of increased accountability also holds schools and districts accountable for the achievement of all students – no matter where they live or their family background. Idaho is a large, rural state with expansive geography, remote communities and a diverse student population. The Sstate ranks as the thirteenth-largest state in the nation geographically, spanning 83,557 square miles and two time zones. Yet, Idaho has a small population with only an estimated 1.5 million people, or 18.1 residents per square mile.

The total student population is about 282,000. Because of this, all but nine of Idaho's forty-four counties are defined as rural, and many communities are remote.

In addition to its rural and remote nature, ~~fifty-50~~ percent of students are low-income across Idaho. Fifteen percent of our students are Hispanic, and 1.5 percent of the student population is Native American. Nine percent of students have disabilities. Six percent of students have been identified as Limited English Proficient. This geographic dispersion often has schools and districts with negligible numbers in identified subgroups. For example, 52 percent of districts have ~~less-fewer~~ than 600 students, and 60 percent of districts have ~~less-fewer~~ than three schools.

Through Students Come First, we are closing the divide between urban, rural and remote communities to ensure every student has equal access to the best educational opportunities to all. Now, the new accountability plan ensures students are receiving these educational opportunities. The new system makes sure these students are growing and achieving.



Schools will be held accountable for all students' proficiency, growth, growth toward proficiency targets, and their achievement in reaching postsecondary and career-readiness metrics. In the growth toward proficiency targets, the Sstate focuses on the academic performance of subgroups of students so every school is held accountable if students are not on a path to postsecondary- and career-readiness.

Finally, through this new system, Idaho teachers, principals and other educators will now have a clear understanding of how they will be evaluated for performance from year to year. Idaho has implemented a new performance evaluation system for teachers in which 50 percent of their evaluation must be based on the Danielson Framework for Teaching and 50 percent must be tied to measures of student growth. The district also must gather parent input to include in evaluations. Principal evaluations also must be tied to student achievement. Under the new accountability system, the Sstate will develop a framework for administrator evaluations and ensure teachers and administrators receive meaningful feedback on their evaluations across Idaho.

Idaho's new accountability system was developed with input from stakeholders throughout the process. Before crafting the accountability plan, the ISDE - State Department of Education held focus groups with representatives of key groups, including classroom teachers, principals, superintendents, school board trustees, parents and community members. Staff from the Department-ISDE met with representatives of Native American tribes and the Idaho Commission on Hispanic Affairs to gather their input and feedback. After developing the new accountability plan, the leaders of every stakeholder group in Idaho – the Idaho Education Association, Idaho Association of School Administrators, and Idaho School Boards Association – had an opportunity to review a draft. The plan was sent to members of the Idaho State Board of Education and every school district superintendent in the Sstate. In addition, the Sstate published the draft on the Department's-ISDE's website and solicited public comment for a month. The public comments and letters received from districts and the Idaho Association of School Administrators were compiled and each was addressed. See Attachment 15, which outlines each recommendation, the group and/or groups that gave the recommendation and how ISDE addressed each.

For these reasons, Idaho's new accountability system addresses the needs of students and families across Idaho. Through this waiver for ESEA Flexibility, Idaho will align its accountability system for schools with its statewide reform efforts and the vision and mission of the Education Alliance of Idaho. This new system of increased accountability provides a comprehensive approach to measuring student performance, holding schools and districts accountable for results and providing the necessary resources statewide to ensure every school can eventually become a Five-Star School.



PRINCIPLE 1: COLLEGE- AND CAREER-READY EXPECTATIONS  
FOR ALL STUDENTS

1.A ADOPT COLLEGE- AND CAREER-READY STANDARDS

- 1.A *Has the SEA adopted college- and career-ready standards in at least reading/language arts and mathematics through one of the two options below?*

**Option A:**

*If the SEA has adopted college- and career-ready standards in at least reading/language arts and mathematics that are common to a significant number of States, consistent with part (1) of the definition of college- and career-ready standards, did it attach evidence that the State has adopted the standards consistent with the State's standards adoption process? (Attachment 4)*

**Option B:**

*If the SEA has adopted college- and career-ready standards in at least reading/language arts and mathematics that have been approved and certified by a State network of institutions of higher education (IHEs), consistent with part (2) of the definition of college- and career-ready standards, did it attach:*

- i. *Evidence that the State has adopted the standards consistent with the State's standards adoption process (Attachment 4); and*
- ii. *A copy of the memorandum of understanding or letter from a State network of IHEs certifying that students who meet the standards will not need remedial coursework at the postsecondary level (Attachment 5)*

Option B.i: The State of Idaho adopted the Common Core State Standards officially during the 2011 legislative session. Page 4 of Attachment 4 illustrates the State Board of Education approval vote. Idaho will have full implementation of the Common Core State Standards by 2013-2014.

Option B.ii: As part of the Memorandum of Understanding for the SMARTER Balanced Assessment Consortium (see Attachment 5), all of Idaho's public colleges and universities signed the agreement noting participation and agreement "in implementation of policies, once the high school summative assessments are implemented, that exempt from remedial courses and place into credit-bearing college courses any student who meets the Consortium-adopted achievement standard (as defined in the NIA) for each assessment and on any other placement requirement established by the IHE or IHE system."



**1.B TRANSITION TO COLLEGE- AND CAREER-READY STANDARDS**

**1.B** *Is the SEA's plan to transition to and implement college- and career-ready standards statewide in at least reading/language arts and mathematics no later than the 2013–2014 school year realistic, of high quality, and likely to lead to all students, including English Learners, students with disabilities, and low-achieving students, gaining access to and learning content aligned with such standards?*

Idaho has been involved in the development of the Common Core State Standards since 2008. Idaho Superintendent of Public Instruction Thomas Luna served on the board of directors for the Council of Chief State School Officers (CCSSO) and was active in promoting a voluntary, state-led effort to develop the common core standards. Idaho adopted the Common Core State Standards in February 2011 with approval from the Idaho State Board of Education ("State Board") and Idaho Legislature.

The State will transition to Common Core State Standards by 2013-2014. Over the next two years, the Idaho State Department of Education (ISDE) will build capacity at the State, district and school levels to ensure the transition to Common Core increases the quality of instruction in every classroom and raises achievement for all students, including English Learners, students with disabilities, and low-achieving students. The State is integrating the transition to Common Core State Standards with the implementation of other critical statewide initiatives to ensure consistency and uniformity across Idaho. For example, the State will provide professional development on the Common Core State Standards as it rolls out a new instructional management system to Idaho teachers. The State also has reformed the teacher evaluation process and will make sure Common Core State Standards are a key part of every teacher performance evaluation and the training that goes with each evaluation.

*A high-quality plan will likely include activities related to the following questions or an explanation of why one or more of the activities are not included.*

- *Does the SEA intend to analyze the extent of alignment between the State's current content standards and the college- and career-ready standards to determine similarities and differences between those two sets of standards? If so, will the results be used to inform the transition to college- and career-ready standards?*

In 2010, staff from the ~~ISDE Idaho State Department of Education (ISDE)~~ worked with Idaho teachers to analyze the alignment between current Idaho Academic Content Standards and new Common Core State Standards in mathematics and English language arts. The ISDE refers to this as the "gap analysis." It was conducted using Achieve's Common Core Comparison Tool. The results were published on the ISDE website in July 2010. (The gap analysis is available online at <http://www.sde.idaho.gov/site/common/>.)



ISDE used results of the gap analysis to inform the public about Common Core State Standards and to build a plan for transitioning to the Common Core State Standards by 2013-14. The gap analysis data were shared in community meetings in Summer and Fall 2010 and also used to inform training the ISDE provided to school districts in Fall 2011 on the implementation of the Common Core State Standards. (Presentations are available online at <http://www.sde.idaho.gov/site/common/>.)

- *Does the SEA intend to analyze the linguistic demands of the State's college- and career-ready standards to inform the development of ELP standards corresponding to the college- and career-ready standards and to ensure that English Learners will have the opportunity to achieve to the college- and career-ready standards? If so, will the results be used to inform revision of the ELP standards and support English Learners in accessing the college- and career-ready standards on the same schedule as all students?*

ISDE will meet the requirements of analyzing the linguistic demands of the Common Core State Standards through its adoption of the 2012 WIDA (World-Class Instructional Design in Assessment) Standards in 2013-2014. These new English Language Development (ELD) standards will be adopted in 2013-2014 and will ensure English Language Learners (ELLs) have the opportunity to achieve Idaho's college- and career-ready standards on the same schedule as all students. The WIDA ELD standards were aligned to the Common Core in 2011 through an alignment study that examined the linguistic demands of the Common Core State Standards.

WIDA's alignment approach is based on Dr. Gary Cook's 2006 adaptation of Dr. Norman Webb's alignment methodology. As with the Webb methodology, Cook's approach expands the concept of alignment by addressing not only content match between tests and standards but also the extent to which tests (and aligned standards) reflect the linguistic/cognitive complexity and breadth of a set of standards.

The correspondence study of the 2007 WIDA Standards to the Common Core State Standards shows a solid alignment. Idaho will adopt the new 2012 edition of the WIDA Standards, which further improves the alignment to the Common Core for an even higher correspondence. This is demonstrated clearly, in that the new 2012 strands were written to close gaps in the 2007 edition and to make correspondence more explicit and understandable to educators. Furthermore, the WIDA Standards Performance Definitions were augmented and address three major criteria present in the CCSS Common Core State Standards, one of which is linguistic complexity. The WIDA standards also have forms, conventions and vocabulary (within academic environments), which are all very closely associated with Common Core State Standards.



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Analysis of assessment data for both all students and students with disabilities (SWD) will be conducted to identify professional development needs for both general education and special education teachers throughout the state. Gap analysis from the assessment data will be used as a point of reference for further drill down and as a mechanism for root cause analysis for the development and targeting of Idaho State Department of Education (ISDE) supported PD projects and trainings. The use of this data will be used to support Idaho teachers in implementing effective instructional practices for SWD by providing connection to the Common Core State Standards and the student's Individual Education Program goals. These efforts will be complimented by Idaho's OSEP Results Work as well as the fact that OSEP moved towards Results Driven Accountability (RDA), which will emphasize the performance of SWD on statewide assessments as a means of evaluating and holding states accountable to the expectations of IDEA. The ISDE is currently using OSEP Performance Indicator 3A as its Results Focus Indicator. Indicator 3A is the combined performance of SWD on Statewide Assessment in both reading and math. Application of this model to Idaho's previous year assessment data has helped direct resources to the development of targeted trainings for Tier 2 Intervention for school teams, including both general and special education representation. For example, these targeted trainings will help districts and schools to better design interventions for all students and support them in understanding how to provide appropriate accommodations for SWD.

Timeline for Implementing the ELD Standards

Activity	Responsible	Timeline
Convene focus groups around the State regarding comments on WIDA ELD Standards.	Title III Division	Spring 2012
Begin work to present WIDA ELD Standards for adoption by the State Board of Education.	Title III and Assessment Divisions	August 2012
Professional Development for school districts regarding WIDA ELD standards.	Title III Division	School Year 2012-13
Board Rule to adopt WIDA ELD Standards presented to Idaho Legislature (for formal adoption in 2013-14.)	ISDE and <del>ISBE</del> State Board staff to present to Idaho Legislature	January 2013
New ELD standards in place. Districts start using WIDA standards. Continued Professional Development provided.	Title III and Assessment Divisions	School year 2013-14



- *Does the SEA intend to analyze the learning and accommodation factors necessary to ensure that students with disabilities will have the opportunity to achieve to the college- and career-ready standards? If so, will the results be used to support students with disabilities in accessing the college- and career-ready standards on the same schedule as all students?*

ISDE will assist school districts and public charter schools in analyzing the learning and accommodation factors necessary to ensure that students with disabilities have the opportunity to achieve college- and career-ready standards. Specifically, ISDE will work with Idaho educators, administrators, and other stakeholders in Spring 2012 to help school districts conduct gap analyses between a student's current baseline with the Idaho Content Standards and the new Common Core State Standards. ISDE will use the results of this analysis to support students with disabilities in achieving Common Core State Standards.

For example, ISDE will provide professional development opportunities for school districts and public charter schools which are infused with and incorporate Universal Design for Learning (UDL) in instruction, technology integration, and assessment, which will in turn increase the opportunities for all students including those with disabilities to demonstrate progress toward the Common Core State Standards. UDL is a set of principles developed by the Center for Applied Special Technologies (CAST) at [www.cast.org](http://www.cast.org), aimed at providing all students with equal opportunities to learn. It involves a flexible approach to instruction that can be adjusted to fit individual learning needs; by designing a learning environment and lesson plans which include opportunities for; multiple means of engagement: multiple means of representation and multiple means of representation and the "consideration" of appropriate assistive technology and accommodations. Equal access is extended to all students under UDL to include the following populations; students with disabilities, English language learners (ELL) and low-achieving students. The use of UDL principles is proposed to facilitate and assure equal access to the learning environment, technology and materials in the general education classroom and to the CCSS-Common Core State Standards in all areas.

In 2011, the State passed comprehensive education reform that resulted in significant changes to Idaho Code. This included changes related to public school funding, labor relations, and the structure of Idaho classrooms. A major goal of the education reform laws, known as "Students Come First,"<sup>22</sup> was to increase the integration of technology in every Idaho classroom over the next five years to ensure that every student has equal access to educational opportunities, no matter where they live or how they learn. Through this technology, teachers can use new tools such as text-to-speech capabilities and magnification to benefit students with special needs.



The ISDE will ensure that all schools have access to and can utilize UDL through a statewide instructional management system, known as Schoolnet. Schoolnet is a web-based platform now available to all classroom teachers and administrators at the building and district levels.

Through Schoolnet, a teacher or administrator can access the Common Core State Standards and lesson plans aligned to the standards and which are UDL-compliant<sup>5</sup>. In 2011-12, six school districts are piloting the use of assessment tools in Schoolnet as well.

These assessment tools will be available to a majority (but not all) of Idaho's schools and districts in the 2015-2016 school year through a competitive grant process. Eventually, all Schoolnet tools and resources will be available to every public school in Idaho in the 2016-2017 school year. The project is funded through a donation from the J.A. and Kathryn Albertson Foundation.

In addition to access to its statewide instructional management system, Idaho is implementing new statewide assessments in 2014-15. The State is a governing partner in the SMARTER Balanced Assessment Consortium (SBAC). Through SBAC, the ISDE will implement a summative assessment to be given at the end of each school year to meet ESEA requirements.

Formative assessment tools will also be available that classroom teachers can choose to use throughout the school year. Idaho plans to pilot the SBAC tests in 2013-14.

The SBAC formative tools and resources for the classroom, interim and summative assessments will be UDL-compliant. The summative and interim assessments will provide for access and accommodations for students with disabilities depending on the student's Individual Education Plan.

Analysis of assessment data for both all students and students with disabilities (SWD) will be conducted to identify professional development needs for both general education and special education teachers throughout the State. Gap analysis from the assessment data will be used as a point of reference for further drill down and as a mechanism for root cause analysis for the development and targeting of Idaho State Department of Education (ISDE)-ISDE-supported PD professional development projects and trainings. The use of this data will be used to support Idaho teachers in implementing effective instructional practices for SWD by providing connection to the Common Core State Standards and the student's Individual Education Program goals. These efforts will be complemented by Idaho's OSEP Results Work as well as the fact that OSEP moved towards Results Driven Accountability (RDA), which will emphasize the performance of SWD on statewide assessments as a means of evaluating and holding states accountable to the expectations of IDEA. The ISDE is currently using OSEP Performance Indicator 3A as its Results Focus Indicator.

<sup>5</sup> To be UDL-compliant, a lesson plan must meet core principles: multiple means of representation, multiple means of action, and expression, and multiple means of engagement.



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Indicator 3A is the combined performance of SWD on sStatewide aAssessment in both reading and math.

Application of this model to Idaho's previous year assessment data has helped direct resources to the development of targeted trainings for Tier 2 Intervention for school teams, including both general and special education representation. For example, these targeted trainings will help districts and schools to better design interventions for all students and support them in understanding how to provide appropriate accommodations for SWD.

**Timeline for the ISDE's Implementation**

Activity	Responsible	Timeline
Design follow-up training on using a gap analysis based on student's current baselines and the standards.	Secondary Special Education and Regional Coordinators	Spring 2012
Create a team to assist in developing/locating assessment rubrics.	Secondary Special Education and SESTA	July 2012
Research secondary assessments that document growth based on Postsecondary and Career Ready standards.	Secondary Special Education, SESTA, and Assessment and Content Teams	Fall 2012
Research link with Common Core State Standards	Secondary Special Education, SESTA, and Assessment and Content Teams	Fall 2012
Collect rubrics available to measure content.	Secondary Special Education, SESTA, and Assessment and Content Teams	2012-13
Create additional rubrics (literacy, mathematics, problem solving, critical thinking, analytical thinking, work place competencies).	Secondary Special Education, SESTA, and Assessment and Content Teams	2012-13
Develop tools to use rubrics to calculate growth.	Secondary Special Education, SESTA, and Assessment and Content Teams	2012-13
Prepare training on how to use the rubrics.	Secondary Special Education and SESTA	School year 2012-2013
Prepare training on how to use the same data to determine Response to Intervention (RTI) interventions, document SLD eligibility, create transition plans, and document SOP.	Secondary Special Education and SESTA	School year 2012-2013
Design evaluation of the trainings' effectiveness.	SESTA	Summer 2013



- *Does the SEA intend to conduct outreach on and dissemination of the college- and career-ready standards? If so, does the SEA's plan reach the appropriate stakeholders, including educators, administrators, families, and IHEs? Is it likely that the plan will result in all stakeholders increasing their awareness of the State's college- and career-ready standards?*

ISDE has conducted outreach to the public and targeted stakeholder groups and will continue to do so to increase awareness as the State transitions to Common Core State Standards. Since the Common Core State Standards were published in 2009, ISDE has conducted outreach in every region of the State to ensure stakeholders are aware of the transition to college- and career-ready standards. Most of those activities are described below in detail. The overarching goal of these activities is to foster increased awareness, understanding, and ultimately the adoption of these standards.

As the standards were being developed, ISDE solicited feedback on those as well as perceived benefits of raising academic standards to a higher college- and career-ready level. In so doing, ISDE additionally sought feedback from institutions of higher education and the Idaho Business Coalition for Education Excellence (IBCEE).<sup>6</sup> Of particular interest was whether the standards would effectively result in students who are prepared for postsecondary education or the workforce, without the need for remediation.

ISDE presented the Common Core State Standards to the provosts of Idaho's institutions of higher education in July 2010 and subsequently corresponded with faculty at these institutions via e-mail. ISDE received verification from each institution of higher education that the Common Core would ensure a student meeting these standards would be prepared for postsecondary education and the workforce. [\(Link to copies of e-mail correspondence.\)](#) In addition, every college and university president in Idaho signed a Memorandum of Understanding committing that a student who passes the State's new assessments aligned to the Common Core State Standards will not need remediation in mathematics or English language arts. The new test is being developed through SBAC and will be implemented in 2014-15.

To expand stakeholder awareness of the Common Core, Idaho sent a team of 10 stakeholders to a national common core adoption conference in Chicago, Illinois on October 30, 2009. The conference centered on discussion of the [Common Core State Standards](#) ~~common core standards~~ and their implementation. Members of the team included representatives from the Idaho Education Association, the Idaho School Boards Association, the Idaho Association of School Administrators, the Idaho Legislature, the Idaho Council of Teachers of English, and the Idaho Council of Teachers of Mathematics as well as Superintendent Luna.

<sup>6</sup> The Idaho Business Coalition for Education Excellence (IBCEE) is a not-for-profit organization, comprising the leaders of approximately 80 of Idaho's largest companies, who share a common goal – better education in Idaho.



The ISDE staff conducted several regional meetings to meet with educators and parents before the Common Core State Standards were adopted. In the meetings, staff discussed the need for college- and career-ready standards like the Common Core and Idaho's plan for transitioning to Common Core State Standards. ISDE conducted these regional meetings in Summer 2009 when the Common Core State Standards were first published and again in Summer 2010 when the State was working to adopt the standards. As noted above, in 2010, the State conducted a gap analysis comparing the Common Core State Standards to Idaho's current content standards. (The Achieve Gap Analysis discussed earlier in this section.)

These results were presented at the regional meetings in Summer 2010 to show parents, teachers, school administrators and legislators how the Common Core State Standards were more rigorous and would better prepare Idaho students for postsecondary education and the workforce.

The ISDE staff also presented at several meetings to targeted educational stakeholder groups, such as the Idaho School Boards Association, the Idaho Association of School Administrators, professional organizations of teachers, higher education, the Idaho State Board of Education, the Idaho Workforce Development Council and the IBCEE. To officially adopt the standards, ISDE conducted additional public hearings and took in-person and written public comment during October of 2010 after initial approval from the State Board of Education on August 12, 2010. The ISDE did not alter the standards based on public comment but did incorporate strategies for implementation into ISDE plans.

The Idaho State Board of Education voted to adopt the Common Core State Standards on November 17, 2010. In January 2011, ISDE representatives presented the standards to the Idaho Legislature. The Legislature approved the standards in January 2011, which are now part of Idaho Administrative Rule.

To develop an effective implementation plan for the Common Core State Standards, the ISDE established a Common Core Leadership Group composed of mathematics and English language arts teachers, principals, superintendents, special education directors, curriculum directors, mathematics coaches, Mathematical Thinking for Instruction instructors, higher education faculty, and ISDE staff. ISDE's content coordinators selected the members of this leadership group because these individuals demonstrated considerable leadership in mathematics, English language arts or their respective role. The leadership group met in May 2011. The group functioned as a focus group, giving ISDE staff input on how to shape a timeline for implementation as well as the tools, resources, and professional development necessary for teachers of all students including teachers of English language learners, students with disabilities and low-achieving students.



As a result of the Leadership Group meeting, the ISDE formulated a timeline for implementation and decided to host trainings with leadership teams from each school district and public charter school in Fall 2011 to begin the process of transition to Common Core.

In the District Leadership Team Workshops, districts and public charter schools had to include a superintendent, principal, curriculum director, test coordinator, and lead teacher in their team. The State reached leadership teams in more than 110 districts and public charter schools serving more than 90 percent of Idaho students. At this workshop, each team learned the overarching concepts of the Common Core, acquired a clear understanding of the implementation timeline, and determined ways in which their district could begin the implementation process. The ISDE team demonstrated the Schoolnet instructional management system, a web-based platform providing instant access to the Common Core State Standards and lesson plans aligned to the standards. The State provided PowerPoints and other materials so districts could replicate a similar training for others at the district or school level.

During April and June 2011, Idaho began a comprehensive process of “unpacking” the Common Core State Standards. The methodology used was Total Instructional Alignment (TIA). TIA<sup>7</sup> is funded through a State Agency for Higher Education (SAHE) grant and is a cooperative effort by all the Idaho state universities.

The TIA professional development consists of a two-day facilitator training and a five-day workshop for teams of classroom teachers from participating school districts, along with faculty from Idaho colleges of education and arts and sciences.

During the training, participating K-12 teachers, school administrators, and college faculty are guided through the process of translating and aligning each Common Core Standard to specific tasks, lesson plans, and example assessment items. To date, the professional development has been provided at the Meridian School District for southwestern Idaho and at Idaho State University for the eastern part of the state. In April 2012, trainings and workshops will be held at the University of Idaho for northern Idaho.

The ISDE is working closely with the Colleges of Education in Idaho’s institutions of higher education to assist them in preparing teachers who can teach students to meet the Common Core State Standards. The Deans of the Idaho’s Colleges of Education meet not less than six times per year at the Idaho Association of Colleges of Teacher Education (IACTE).

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<sup>7</sup> The Total Instructional Alignment [TIA] system, developed by Lisa Carter, is a standards and instruction alignment tool. TIA work on the Common Core State Standards is funded by a SAHE grant administered by the Idaho State Board of Education and housed at Idaho State University, with many teachers statewide, particularly from eastern and southwest Idaho contributing to the effort.



In addition to the deans and/or directors of teacher preparation programs, representatives from the Idaho State Board of Education and the ISDE attend these meetings as regular non-voting members of the association.

At each meeting, updates being considered by the State are shared with the entire group in order to solicit feedback.

The ISDE and State Board staff worked with three deans representing IACTE to develop a new process which the State will follow in making teacher preparation program approval decisions. This will further ensure that Common Core State Standards are integrated into teacher preparation programs and that the State Board has more oversight over the success of teacher preparation programs. The revision to the State's process for approving teacher preparation programs requires a change in Idaho Administrative Rule which ISBE recently approved. The rule ~~change will was approved by the Idaho Legislature during the go to the State Legislature's House and Senate Education Committees for consideration in January 2012 Legislative Session, and later to the full Idaho Legislature for adoption.~~

Under the revisions, teacher education programs would have to show how they are implementing the Common Core State Standards into preservice programs ~~the Common Core State Standards~~ by no later than 2014-15. The State will begin to conduct focused reviews of State-specific, core teaching requirements that may be amended if necessary to meet the goals the Idaho State Board of Education has set in its strategic plan for K-12 public schools.

The emphasis on State teacher education reviews anticipated over the next decade will include integration of technology, the use of student data to drive instruction, and the pre-service preparation that address effective K-12 practices in the teaching of the Common Core State Standards. (IDAPA 08.02.02.100).

- *Does the SEA intend to provide professional development and other supports to prepare teachers to teach all students, including English Learners, students with disabilities, and low-achieving students, to the new standards? If so, will the planned professional development and supports prepare teachers to teach to the new standards, use instructional materials aligned with those standards, and use data on multiple measures of student performance (e.g., data from formative, benchmark, and summative assessments) to inform instruction?*

ISDE plans to provide professional development and ongoing support to all classroom teachers as they transition to the Common Core State Standards. Professional development opportunities will focus on all teachers as well as teachers of English language learners (ELLs), students with disabilities, and low-achieving students. To conduct these opportunities for all teachers, ISDE will integrate the professional development activities for Common Core State Standards with other sStatewide initiatives and strategic partnerships that are already established.



Below is a synopsis of how ISDE will provide that professional development to all classroom teachers. That is followed by a timeline for the delivery of the professional development activities.

The professional development activities that ISDE will carry out are cross-cutting. They include programs and training opportunities that focus on the system of schooling as well as targeted components of the school system. Furthermore, these activities address the capacity of different audiences as appropriate. At times, support is given to specific teachers and school leaders. In other circumstances, it is most appropriate to provide support to district leaders. And, in many cases, support is provided across job roles to ensure diffusion of the innovation or ideas included in the activity. Table 1 provides an overview of the activities, which are described in further detail below.

**Table 1**  
**Overview of Activities**

	Focus		Audience		
	System-Wide	Targeted	Teachers	School Leaders	District Leaders
Classroom Technology Integration		✓	✓	✓	✓
Idaho Building Capacity Project	✓			✓	✓
Idaho Math Initiative		✓	✓	✓	
Idaho's English Language Development Program	✓		✓	✓	✓
Response-to-Intervention (RTI)	✓			✓	✓
Statewide Instructional Management System		✓	✓	✓	✓

**Professional Development Activities**

**Statewide Instructional Management System:** The J.A. and Kathryn Albertson Foundation granted ISDE \$21 million to implement a statewide instructional management system, known as Schoolnet. Schoolnet is a web-based platform providing multiple tools for classroom teachers and administrators at the building and district levels. The tools include instant access to data on individual student attendance and academic achievement; access to Idaho Content Standards and Common Core State Standards; lesson plans aligned to Common Core State Standards; and digital content aligned to standards and lesson plans. Teachers can develop their own lesson plans and share with others in their own building, district, or across the State. ISDE is using an estimated \$2 million a year in grant funding from the Albertson Foundation to provide professional development to classroom teachers on how to use Schoolnet.



The Common Core State Standards have become the foundation of Idaho's efforts to reform its education system through the passage of the Students Come First legislation in 2011.

Thus, ISDE emphasizes the alignment of content, curriculum, and lesson plans in each of the professional development activities related to Schoolnet. Statewide training focused on the Common Core State Standards and lesson plan alignment has and will continue to occur. The State is contracting with retired school district superintendents and building administrators who showed excellence during their careers to assist with this professional development. After an application process, the State selected 17 individuals who have undergone additional training in the effective use of Schoolnet. ~~Beginning in~~ In February 2012, they ~~were~~will be based regionally to assist each of the six pilot Schoolnet districts during the remainder of the 2011-2012 school year. In 2012-13, the State will recruit and train 20 more data coaches to offer support and assistance to other districts across Idaho. They will support teachers and school administrators through face-to-face and web-based interaction on a regular basis throughout the school year.

**Classroom Technology Integration:** As has been noted in this request for flexibility to implement a next-generation accountability system, the State passed comprehensive education reform that significantly changed Idaho Code related to public school funding, labor relations, and the structure of Idaho classrooms. (For the full text of the Students Come First laws, visit <http://www.studentscomefirst.org/bill.htm>.) A major goal of the Students Come First education initiative is to increase the integration of technology in every Idaho classroom over the next five years to ensure every student has equal access to educational opportunities, no matter where they live or how they learn. The Students Come First legislative package included: ~~\$10-9~~ million in funding in classroom technology for all grades and \$4 million in professional development opportunities annually.

Through advanced technology, teachers can utilize new tools to individualize instruction for every student and help all students, including those with special needs, to achieve their learning goals.

To receive funding for advanced classroom technology, every school district and public charter school in Idaho ~~must~~submitted a plan to ISDE by January 2012 detailing how the classroom technology they plan to use is linked to student achievement goals, including the transition to the Common Core State Standards.

**Response-to-Intervention (RTI):** Idaho has scaled up implementation of RTI significantly over the past seven years. Beginning with the cohorts of schools participating in Reading First, ISDE piloted and refined the RTI model. Subsequently, virtually all school improvement efforts have been influenced by or specifically



include the elements of RTI as a model for meeting the needs of all students. Most recently, Idaho has worked in partnership with the National Center on Response to Intervention (NCRTI).

NCRTI has assisted Idaho with the development and delivery of statewide training in the essential elements of RTI and implementation planning by helping build a highly effective model for continuous improvement.

The RTI model is built on a multi-level tiered prevention system that includes data-based decision-making using screening tools and progress monitoring techniques. It provides differentiation in core academic subjects.

All students are expected to be served in Tier 1, the level in which core academic instruction is provided based on State standards (i.e., the Common Core State Standards). For students who struggle and need additional time and intervention, Tier 2 provides additional opportunities for them to catch up and keep up in the core academic subject areas. Lastly, for students who are substantially behind, Tier 3 is highly intensive instruction, often stripped of any non-essential coursework, in which students are taught directly and in ways that will help them to close their achievement gaps in the quickest manner. The RTI model is well established in Idaho and also serves as an effective way to improve the instruction and outcomes for students with disabilities. It has been integrated into the State's school improvement planning model and Title I Schoolwide Program planning process. It also forms the basis for identification of students with a Specific Learning Disability. A majority of Idaho schools and more than 80 percent of Idaho school district leadership teams have been trained in the RTI model. As the State transitions to Common Core State Standards, the RTI model will continue to serve as a highly effective vehicle that schools and districts will use to ensure all students, including students with disabilities, are achieving college- and career-ready standards.

**Idaho Building Capacity Project:** To better assist low-performing schools, ISDE partnered with Idaho's three largest public universities and created a program to train and support school and district improvement coaches. More commonly referred to as Capacity Builders, these individuals work directly with school and district leadership teams to improve student achievement. Capacity Builders are veteran building and district administrators who have the requisite skill set to effect lasting change and build effective relationships with school personnel. Each university employs the services of a Regional School Improvement Coordinator who works directly with ISDE to identify Capacity Builders.

The regional coordinators provide the Capacity Builders with professional development and then contract with them to provide services over a three-year period. The Capacity Builders provide hands-on technical assistance linked to research-based best practices. Their primary goal is to develop the capacity of local leaders in understanding the characteristics of effective schools and how to manage change in a complex school system.



The Idaho Building Capacity Project was piloted in 2008 and fully implemented statewide in 2009.

The project now serves 105 schools and districts statewide. Since its inception, the State also has utilized Capacity Builders to implement other new statewide programs and initiatives, such as Response to Intervention implementation grants and the statewide longitudinal data system.<sup>8</sup> ISDE provided initial training for Capacity Builders on the Common Core State Standards in Summer 2011 and will continue to provide more in-depth training so they can assist with the dissemination and implementation of the Common Core in their schools and districts.

**Idaho Math Initiative:** In 2008, ISDE launched the Idaho Math Initiative, a \$4 million annual statewide effort to raise student achievement in mathematics across all K-12 grade levels. Through the Math Initiative, the State provides remediation through a web-based supplemental mathematics instruction program for students who are struggling, advanced opportunities for students who excel in mathematics, and a three-credit professional development course for every mathematics teacher and school administrator.

The Mathematical Thinking for Instruction (MTI) course was developed in partnership with Dr. Jonathan Brendefur of Boise State University to enhance educators' content knowledge in mathematics and their understanding of how students best learn mathematics. The course has been aligned to the Common Core State Standards and will provide a strong foundation for implementing the Common Core mathematics standards across Idaho.

All K-8 certified teachers, 9-12 mathematics teachers, and school administrators are required to take the MTI course in order to recertify in 2014<sup>9</sup>. To date, approximately 59 percent of the required teachers and administrators have completed the course. The remainder is expected to complete the course by the end of 2012-13. The course has been divided into three tracks to better serve educators, based on the grade level they teach: K-3 track focuses on early number sense, 4-8 track on rational number sense, and 6-12 track on algebraic thinking.

Through the MTI course, educators learn to develop and utilize research-based strategies to assist all students regardless of their challenges: achievement level, English language learners, and students with disabilities.

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<sup>8</sup> Idaho began developing its Statewide longitudinal data system in 2008. The State fully deployed the longitudinal data system for the first year in 2010-11.

<sup>9</sup> The following educators are required to successfully complete the MTI course prior to September 1, 2014 in order to recertify: teachers holding Early Childhood/Early Childhood Special Education Blended Certificate (Birth - Grade 3) employed in an elementary school classroom (multi-subject classroom, K-8); teachers holding a Standard Elementary School Certificate (K-8); teachers holding a Standard Secondary School Certificate (6-12) teaching in a mathematics content classroom (grade six (6) through grade twelve (12)) including Title I classrooms; teachers holding a Standard Exceptional Child Certificate (K-12); and school administrators holding an Administrator Certificate (Pre K-12).



As part of the Idaho Math Initiative, ISDE has contracted with Boise State University to employ six mathematics specialists, who cover five regions statewide. During 2011-12, the regional mathematics specialists are teaching the MTI courses approximately 40 percent of their time and providing in-school support approximately 40 percent of their time. Through in-school support, they provide hands-on technical assistance to classroom teachers and school administrators as they implement the strategies learned in the MTI course. The remaining time is spent on research and administrative duties. As teachers and administrators complete the MTI course, the regional mathematics specialists will move to full-time in-school support.

These regional specialists and the Mathematics Coordinator at ISDE will assist schools and districts as they transition to Common Core State Standards through ongoing professional development and support through workshops, webinars, and a four-year unit study aligned with the Common Core and based on the Japanese model of Lesson Study.

English Language Arts (ELA) CCSSCommon Core State Standards: A multifaceted approach, from asynchronous tools to face-to-face training, has been established with regard to professional development opportunities for transition to the Common Core State Standards (CCSS) for English Language Arts. In January 2012, the SDE established a comprehensive CCSS Toolbox for English Language Arts on the ISDE website at the following link: <http://www.sde.idaho.gov/site/common/>.

This site is broken into discrete modules housing a variety of resources for educators at various levels of understanding of the common core. Understanding that a key nexus of foundational principles lies in the area of analyzing and writing about more complex texts across the content areas, tools are available to show examples of the types of exercises and assessments that incorporate these skill sets that reach to highest cognitive level. In addition, this site contains links to the latest set of Performance Tasks developed by the Smarter Balanced Consortium (SBAC) for the new assessment aligned with the CCSSCommon Core State Standards. These tasks embody the deeper learning experiences and the expectation that students must consistently work at a higher cognitive level so foundational to the core. SBAC tools will be continually emphasized as they come to fruition and are made available to all member states in the coming months and years. This tool-box is constantly being updated as new tools for teachers become available to strengthen implementation efforts in English Language Arts.

In addition, the ISDE has reached an agreement with the Illinois State Board of Education to share a rich and comprehensive set of electronic resources for teachers developed by Illinois to support writing instruction in the three modes of writing emphasized in the CCSSCommon Core State Standards and the SBAC assessment model: informational, argumentative, and narrative. Featured, in addition to richly annotated anchor sets and practice scoring sets, are videos of actual classroom instruction tied to core writing principles. These asynchronous tools will be made available to schools and teachers.



With strategic partners (Boise State Writing Project and Northwest Inland Writing Project) the ISDE is collaborating to offer deep, hands-on learning opportunities for educators in the summer 2012. The ISDE has developed a series of four three-day workshops for district teams emphasizing the use of more complex informational text in the classroom across the curriculum.

Featuring how to select, evaluate and intertwine complex text into instruction as well as devise opportunities for students to write and speak about what they read, these teams (one ELA teacher, one teacher from another content area, and one administrator) will begin to create actual student lessons based on the [CCSSCommon Core State Standards](#).

Further, the ISDE will be providing scholarships on a regional basis to an online graduate course at [BSUBoise State University](#) on evaluation and use of informational text aligned to the [CCSSCommon Core State Standards](#). Recipients will be required to lead study groups in their home districts to share their knowledge upon completion of the course work. The intent of the district team approach and the scholarship program is to create concentric circles of expertise transpiring from this face-to-face training system wide, thus further leveraging the impact of the training. Finally, because there is a natural progression from informational to the related but more complex argumentative mode, plans are being made to offer similar programs for argumentative writing in summer 2013 and then narrative writing, as it is very different from the other modes, in summer 2014.

In July and August 2012, ISDE staff will present at three regional Best Practices Institutes on the importance of increasing text complexity and in understanding the new definition of text complexity, which incorporates qualitative factors such as layers of meaning and complexity to structure in addition to quantitative measures such as Lexile ratings. As text complexity drives many of the changes in the approach teachers of all content areas must take to teach the [ELA Common Core State Standards](#) ~~ELA-CSSS~~ with fidelity, this will be the first of many professional opportunities to delve into this critical area. Also, text complexity will be presented through the lens of students creating authentic products, be they written pieces or oral presentation, based on the analysis, synthesis of text or audio visual stimuli. The audience will be teachers from all content areas and administrators, primarily curriculum directors and principals.

Begun in the spring of 2012 and designed to continue through 2014, the 21<sup>st</sup> Century Master Teacher program is designed to support implementation of a number of ISDE initiatives (integration of technology in the classroom, the state learning management system, UDL), with implementation of the ELA-Literacy standards of the [CCSSCommon Core State Standards](#) being the foundation and anchor of the entire program. In order to demonstrate best practices in instruction aligned to the [ELA-Literacy CCSSCommon Core State Standards](#), master teachers were recruited statewide and trained on how to infuse technology in the classroom, use universal



design for learning and the new lesson plan template, and build lessons and units aligned to the CCSS. Via the state learning management system, Schoolnet, these exemplar lesson plans, nearly 250 from all content areas, will be shared statewide, giving teachers excellent, concrete example of how to make instructional practice change based on the new ELA-Literacy standards of the CCSS Common Core State Standards across the curriculum, helping build support for the core across the full spectrum of teachers. These master teachers will also help evaluate additional lesson plan entries and select contest winners. All these efforts will build a robust bank of lesson plans to be used across the state and refined by actual classroom use and further supported by the professional learning community capabilities of Schoolnet.

Monies are available to build and perhaps expand this critical program that braids so many initiatives for at least the next two fiscal years.

The ISDE will continue to build upon these initial efforts to create in district capacity and understanding of the CCSS Common Core State Standards for ELA that hold the promise of pulling together all instructional change across the curriculum under the umbrella of literacy owned not just by the English teacher, but by all teachers.

**Idaho's English Language Development Program:** Idaho plans to adopt the WIDA (World-Class Instructional Design in Assessment) English Language Development (ELD) Standards in 2013-14. ISDE will begin the transition process in 2012-13 with public forums for communities and professional development opportunities for teachers and school administrators. ISDE will use processes currently in place to transition to and implement the new Standards.

In 2010, in an effort to better serve ELL students Statewide, ISDE conducted a needs assessment to guide the State's policy and funding direction for ELL programs. In this assessment, ISDE examined data from the ISAT, IELA, IRI<sup>10</sup>, and Integrated Focus Visits –(monitoring and technical assistance visits) provided to school districts. As a result of the assessment, ISDE shifted more attention to improving English Language Development (ELD) program services by developing the Idaho Toolkit and organizing ELD Standards Workshops Statewide.

To ensure consistency and better assist all districts in providing research-based ELD program services, ISDE developed the Idaho Toolkit in Fall 2011. The Idaho Toolkit provides districts with historical foundations, legal requirements for teaching ELL students, content standards, and the most current research on effective and culturally responsive programs and instructional practices for ELLs. The Toolkit is designed so school districts and charter schools can tailor it to their individual needs.

<sup>10</sup> ISAT – Idaho Standards Achievement Tests, the general assessment series of mathematics, reading, and language usage used to meet NCLB requirements.

IELA – Idaho English Language Assessment, the English language proficiency assessment used to meet NCLB's Title III requirements and to assess entry, exit, and progress of English language proficiency by ELL students.

IRI – Idaho Reading Indicator, a reading assessment required by Idaho Statute to be given in K-3 twice a year to monitor students' progress and identify achievement gaps in reading skills.



ISDE also organizes regional ELD Standards workshops every year. Through these workshops, the State assists ELL teachers, content teachers, and school administrators as they incorporate ELD standards into their instruction. This serves to ensure that ELLs have full access and opportunity to master prescribed academic content. As Idaho transitions to Common Core State Standards and WIDA Standards aligned to the Common Core, these workshops will focus on the new sStandards and how Idaho educators can view these standards as intricately connected rather than separate from one another. Trainers for these workshops are State-endorsed and highly qualified elementary and secondary school ELD teachers/coaches and content area teachers. ISDE has found these workshops to be particularly effective because they are provided by educators in the field who use the standards every day.

In addition to efforts already in place, the State will use State-endorsed, highly qualified elementary and secondary school ELD teachers/coaches and content area teachers to provide more targeted professional development opportunities to ensure the full implementation of WIDA standards. ISDE's LEP Coordinator will work collaboratively with the content specialists at the State to provide specific professional development opportunities, tools, and resources for the access to and mastery of the Common Core State Standards by ELL students.

Following adoption of the WIDA standards, Idaho will also adopt a new online English Language Proficiency Assessment being developed by WIDA through a U.S. Department of Education ~~n-ED~~ Enhanced Assessment Grant.

**National Center and State Collaborative (NCSC) GSEG Tier II Involvement:** Idaho's involvement in the NCSC as a Tier II state participant, allows Idaho teachers<sup>2</sup> of students with significant cognitive disabilities access to the Common Core State Standards aligned professional development, curriculum and instructional resources pilot tested and refined by the Tier 1 states. Idaho will have access to all NCSC products and materials before broad dissemination by 2015. Specifically, Idaho's involvement as a Tier II state is to provide feedback on usability and outcomes of NCSC provided tools and protocols. Idaho will look to recruit a minimum of one to two cohorts, consisting of two to three teachers of students with significant cognitive disabilities who administer the ISAT-Alt, in each of our six state regions. Idaho will also look to recruit individual districts which can support district-wide collaboration regarding the NCSC professional development, curricular, instructional and assessment tools provided. Participating cohorts and/or districts will also be asked for input on alternate assessment decisions and will be utilized in delivering regional trainings once the NCSC alternate assessment has been developed.



**Professional Development Timeline**

Table 2 provides an overview of the professional development timeline, with activities described in greater depth below.

**Table 2  
Professional Development Timeline**

	Focus		Audience		
	System-Wide	Targeted	Teachers	School Leaders	District Leaders
<b>2011-12 School Year</b>					
Idaho Math Initiative		✓	✓	✓	
iSTEM Summer Institutes		✓	✓		
Idaho Summer Institute of Best Practices		✓	✓	✓	
District Leadership Team Workshops	✓				✓
Online Office Hours & Webinars		✓	✓		
Common Core State Standards Toolkits		✓	✓		
Summer Regional Institutes		✓	✓		
Response-to-Intervention (RTI)	✓			✓	✓
<b>2012-13 School Year</b>					
Integrating Classroom Technology		✓	✓	✓	✓
Curriculum Integration	✓				
Transition to WIDA Standards	✓		✓	✓	✓
Recruit and Establish NCSC cohorts		✓	✓		
Model Instructional Units		✓	✓		
Regional Mathematics Specialists		✓	✓	✓	✓
Response-to-Intervention (RTI)	✓			✓	✓
<b>2013-14 School Year</b>					
Implementation of WIDA Standards	✓		✓	✓	✓
Pilot NCSC <del>PD</del> professional development, curriculum, and assessment resources		✓	✓		
Regional Mathematics Specialists		✓	✓	✓	✓
Response-to-Intervention (RTI)	✓			✓	✓
<del>SMARTER</del> Smarter Balanced Assessment Consortium Training		✓	✓	✓	✓



**2011-12 School Year:** Professional development activities during 2011-12 have focused on initial training opportunities to familiarize classroom teachers with the Common Core State Standards, how they can familiarize themselves with the new standards, and begin implementing the standards in their classroom if they choose.

- Idaho Math Initiative, 2008 to 2011: During this time, 59 percent of the required teachers and administrators have completed the three-credit Mathematical Thinking for Instruction course. The remainder is expected to complete it by the end of 2012-13. The MTI Course was designed as part of the Idaho Math Initiative in 2008. It was fully aligned to the Common Core State Standards in 2009. This course has helped ensure K-8 teachers and high school mathematics teachers are better prepared to implement the Common Core. Six regional mathematics specialists provide follow-up support to teachers as they work in the classroom.
- iSTEM Summer Institutes, July 2011: The iSTEM workshops consisted of three regional workshops held in Twin Falls, Nampa, and Coeur d'Alene. Teachers representing all grade levels across Idaho learned how to incorporate science, technology, engineering, and mathematics (STEM) activities into their lesson plans. ISDE presented on the Common Core State Standards at two of the three regional workshops, reaching 300 teachers at the Twin Falls and Coeur d'Alene regional workshops.
- Idaho Summer Institute of Best Practices, August 2011: More than 150 classroom teachers and building principals attended the two-day Summer Institute that focused on research-based best practices to incorporate in the classroom. The Institutes ~~was~~ were held in Wendell, Idaho Falls, and Coeur d'Alene. Each session focused on hands-on implementation activities and discussion of how the Common Core aligns to the current content standards.
- District Leadership Team Workshops, Fall 2011: In this capacity-building effort, an ISDE team delivered training to district leadership teams consisting of a superintendent, principal, curriculum director, test coordinator, and lead teacher. The State reached more than 110 district leadership teams serving more than 90 percent of Idaho students.

At these workshops, each team learned the overarching concepts of the Common Core, a clear understanding of the implementation timeline and ways in which their district could begin the implementation process. The ISDE team demonstrated the Schoolnet instructional management system, a web-based platform providing instant access to the Common Core State Standards and lesson plans aligned to the standards.

ISDE's Coordinated School Health team presented on their efforts to work with the Council of Chief State School Officers Health Education Assessment Project (HEAP) to develop effective health education assessment resources.



Through this project, the State also will work to teach health content through literature and informational text, keeping with a major goal of Common Core to teach literacy across the disciplines.

- Online Office Hours, Spring 2012: ISDE staff are planning online office hours and short tutorials bi-monthly on selected Common Core State Standards topics. Online office hours will be open-ended webinars where teachers can join for a few minutes or for a long period of time, depending on their questions. No specific agenda is set, but this approach makes sure teachers have access to experts at ISDE's offices.

The bi-monthly tutorials are scheduled webinars focused on a single topic. These have a set agenda with time left for questions at the end. Both online office hours and tutorials will be held after school hours to allow classroom teachers to participate. Copies will be archived and provided on the ISDE website and through Schoolnet.

- Hosted on the ISDE common core website, -Common Core State Standards Toolkits specifically for teachers are being developed to be deployed in spring 2012. These Toolkits will be published on ISDE's website in January 2012 and advertised to teachers through the monthly teacher newsletter, direct e-mails to principals, Schoolnet and professional organizations. The Toolkit will include modules organized to move incrementally from awareness to deeper understanding. Introductory material includes short video vignettes created by writers of the Common Core that underscore key principles of the standards, tutorials on the structure of the standards and critical documents supporting the need to move to the Common Core. This is followed by materials such as an in-depth deconstructed version of the standards, the alignment analysis of the Common Core to Idaho Standards, comparison of and concrete examples of what the standards look like in the classroom. Among the items are videos of sample lessons, sample curricular units, curricular maps from several sources, in-depth instruction on writing instruction and assessment, content alignment tools, criteria to guide curriculum developers and publishers, and professional development tools. Finally, a synopsis of the role of Smarter Balanced Assessment Consortium (SBAC) and implementation of the Common Core State Standards -demonstrates that this next generation assessment will adhere with fidelity to all core principles and claims of the Common Core. Links to all sample SBAC item types and important documents such as the Content Specifications are included. This site will be continually updated to provide Idaho teachers with the most complete and up to date resources as they are created or become available. These resources will also be available on Idaho's statewide data management system, Schoolnet.



- Summer Regional Institutes, Summer 2012: The ISDE is planning Summer Institutes to delve more deeply into the Common Core State Standards and how a classroom teacher can transition to the new standards 2012-13 and beyond. The State has developed strategic partnerships with groups, such as the Boise State Writing Project, to provide training in specific areas of the Common Core.

The Boise State Writing Project, for example, will provide training on writing across the curriculum including using scoring rubrics as a platform for instruction and a common language around learning, with specific tutorials around the three modes of writing emphasized by the Common Core: informative, narrative and argumentative. The Idaho Math Initiative staff will also host a Mathematics Initiative Conference that will provide deeper, hands-on work with the Common Core mathematics.

- RTI: The ISDE will continue to invest in building the expertise of all school staff and establishing district and school teams through the Math Initiative in order to support quality Tier1 and Tier 2 instruction. This includes special attention to alternate approaches [differentiated instruction] in order to provide all students access to regular core curriculum.

**2012-13 School Year:** ISDE, working with strategic partners, will provide more in-depth training on the Common Core State Standards and how Idaho classroom teachers can effectively transition to the new standards.

- Integrating Technology: In Fall 2012, all high school teachers will receive a mobile computing device as the State begins to phase in its one-to-one initiative. Under this initiative, every Idaho high school will have a one-to-one ratio of mobile computing device to student and teacher by 2015-16. At the same time, the State is investing in additional technology for all classrooms with \$13 million annually for technology and professional development. As Idaho's classroom teachers work to integrate technology in the classroom, the State will partner with Boise State University to show them how advanced classroom technology can assist in transitioning to the Common Core State Standards.

In partnership with Boise State, ISDE will create short, web-based interactive tutorials demonstrating best practices in classroom technology integration tied to the Common Core. The tutorials will emphasize Universal Design for Learning (UDL) to ensure teachers know how to individualize instruction and meet the needs of all students, including those who are English language learners, students with disabilities, or low-achieving students. All tutorials will be archived online for future use.



- Curriculum Integration: ISDE Content Coordinators for mathematics and English language arts will develop curricular protocols and training in repurposing existing curricular resources to bolster the areas needed to support a successful implementation of the Common Core. The Coordinators will work closely with ISDE's Limited English Proficient Coordinator, Special Education team, and Statewide System of Support team to ensure that their work also meets the needs of all students, including English language learners, students with disabilities and low-achieving students.
- Model Instructional Units: ISDE Content Coordinators for mathematics and English language arts will develop model instructional units and videos of instructional best practices. The Coordinators will utilize Schoolnet to share these materials with classroom teachers across Idaho.
- Regional Math Specialists: As a vital link in providing support and extended follow-up to the common core compliant MTI training course which they will continue to teach, these specialists will deliver instructional support to in-service teachers to improve content knowledge, pedagogical knowledge, RTI, and ~~CCSS~~ Common Core State Standards knowledge. In addition, regional specialists will provide critical support of focused school improvement efforts to ensure high quality mathematics professional development and effective transition to the common core. The well-established structure of the MTI program, the expertise of the specialists, and the strength of the current relationships with the field built over a number of years, makes the cadre of regional specialists a potent tool in service of common core implementation.

Transition to WIDA Standards: ISDE will provide the professional development required by the WIDA (World-Class Instructional Design in Assessment) Consortia to ensure the State provides the necessary training for all teachers as they transition to new English Language Development (ELD) Standards.

- Recruit and establish regional cohorts for piloting of the National Center and State Collaborative (NCSC) tools.
- RTI: RTI The ISDE will continue to invest in building the expertise of all school staff and establishing district and school teams through the Northwest Inland Writing Project and the Boise Writing Project who provided training to over more than 1,000 Idaho teachers in 2010 in order to support quality Tier1 and Tier 2 instruction. This included special attention to alternate approaches [differentiated instruction] in order to provide all students access to regular core curriculum.

**2013-2014 School Year:** The 2013-14 school year is the first that Idaho's teachers will be teaching Common Core State Standards in their classrooms. The State will offer ongoing support throughout this year.



- Regional Mathematics Specialists: This group will continue to build the capacity of teachers and school and district teams by providing additional outreach opportunities for professional development, particularly in the summer for administrators and teachers. Model lesson plans will be created and available for all individuals and teams who complete the MTI course to further bolster integration of Common Core math principles into classroom instruction.
- Implementation of WIDA Standards: ISDE will provide the professional development required by the WIDA (World-Class Instructional Design in Assessment) Consortia to ensure the State provides the necessary training for all teachers as they begin teaching the new English Language Development (ELD) Standards.
- Piloting of NCSC Tools: ISDE will use NCSC professional development, curriculum, instruction and assessment resources and tools and provide required feedback on usability and outcomes. ISDE will collect input from cohorts/districts for alternate assessment decisions in Idaho.
- RTI: An increased effort to build capacity of the school and district teams will be the cornerstone of RTI efforts. The ISDE will continue to invest in building the expertise of all school staff through the Math Initiative in order to support quality Tier1 and Tier 2 instruction. This includes special attention to alternate approaches [differentiated instruction] in order to provide all students access to regular core curriculum.
- Smarter ~~MARTER~~-Balanced Assessment Consortium Training: ISDE will pilot the new assessment developed through the ~~SMARTER~~-Smarter Balanced Assessment Consortium (SBAC). The end-of-the-year summative assessment will be fully implemented in 2014-15 school. Formative assessment tools that teachers can use throughout the school year will be available in 2014-15 as well. In 2013-14, ISDE will make SBAC-related resources available to classroom teachers, including formative and interim assessment item banks, learning progressions with embedded test items, performance tasks with annotated scoring guides. Scoring guides and examples for all constructed items and performance assessments, including practice sets and annotated scoring guides for writing assessments will be included in this suite of tools for teachers. The ISDE will provide training on these resources throughout the year.
- *Does the SEA intend to provide professional development and supports to prepare principals to provide strong, supportive instructional leadership based on the new standards? If so, will this plan prepare principals to do so?*



ISDE has a plan to provide professional development and ongoing support to principals based on the Common Core State Standards.

The building principal is the instructional leader who plays a critical role in making the implementation of the Common Core State Standards successful and sustainable. As the instructional leader, the building principal will provide support, technical assistance, evaluation and guidance. To fulfill this role, the State will provide principals with initial professional development and ongoing support.

The State's goal is for every building principal to be the instructional leader with a high level of knowledge of the Common Core State Standards.

To accomplish this goal, ISDE is developing a three-pronged approach that will provide face-to-face professional development for building principals, a toolkit of resources for principals to utilize during the school year, and additional training on the teacher performance evaluation process. First, in Spring 2012, ISDE will develop and publish a Toolkit for Principals on its website. The Toolkit will include an in-depth suite of materials focused on awareness and deep understanding of the standards and the important changes they demand in the creation and delivery instruction. Other critical sections will provide training on teacher evaluations and what quality instruction infused with Common Core principles looks like for all disciplines. Principals imbued with deep working knowledge of the Common Core will help drive the instructional change so essential for successful implementation. ISDE will advertise the Toolkit to principals and district superintendents through direct e-mails, newsletters, and professional organizations. In addition, the State will offer webinars in the spring on how to use the Toolkit. ISDE will hold at least three focus groups with principals in different regions of the State to get feedback on the effectiveness of the Toolkit and what, if any, improvements should be made. The State also will measure the effectiveness of the Toolkit during administrator professional development opportunities in Summer 2012.

Second, ISDE will host training opportunities for principals in Summer 2012 focused on the Common Core State Standards. These workshops will be designed to build deep knowledge of the common core and provide administrators tools to provide effective and constructive feedback via classroom observations and evaluation of lesson plans using the newly adopted UDL compliant lesson plan template. ISDE will measure the effectiveness of the trainings with pre- and post-surveys. After the trainings, ISDE will hold at least three focus groups with building principals and instructional coaches located in certain districts and schools across the state to gather more data on school-based needs to implement the Common Core successfully.

Additionally, ISDE will host at least two focus groups with classroom teachers from different regions of Idaho to gather their feedback on what more building principals need to be effective instructional leaders and to successfully implement the Common Core. These focus groups will all be conducted by the end of September 2012, so the results can be used to shape future trainings.



Finally, by Fall 2012, ISDE will develop teacher performance evaluation protocols that incorporate the Common Core State Standards. Idaho already has a Statewide Framework for Teacher Performance Evaluations based on the Charlotte Danielson Framework for Teaching. ISDE has been providing training on this new evaluation model to teachers and school administrators since Fall 2009. Idaho school districts and public charter schools implemented this framework for the first time in 2011-12.

In Fall 2012, ISDE will provide additional training to classroom teachers and school administrators on how building principals and other evaluators should incorporate the Common Core State Standards into the teacher performance evaluation process.

The training will be a combination of face-to-face workshops and webinars offered throughout the school year.

In addition to these efforts, ISDE will ensure the Common Core State Standards are incorporated into the agendas and discussions of pre-established statewide professional learning communities for school administrators. ISDE created the Idaho Superintendents' Network in 2009 to support the work of district leaders in improving learning outcomes for all students by focusing on the quality of instruction. Currently, 37 superintendents participate in the Network, representing one-third of superintendents statewide.

Superintendents who serve a high percentage of at-risk students receive first priority to join. Membership is limited based on funding. The group meets face-to-face four times a year. Topics for discussion in 2011-12 have included improved outcomes for students, developing a sense of purpose, working with stakeholders, district central offices and learning improvements, creating and supporting district and building-level leaders, and analyzing teaching and learning through data. ISDE's Content Team is regularly consulted by the Superintendents' Network staff to ensure Common Core State Standards are incorporated into the discussions regarding how these key leaders must plan and prepare for implementation.

The Principal Academy of Leadership (PALs) is a project developed by ISDE to support the work of building-level administrators in improving outcomes for all students by focusing on the quality of instruction. Approximately 35 principals participate each year in a balance of content, professional conversation, and collegial instructional rounds related directly to improving the overall effectiveness of the Instructional Core such as those described below.



The effective leadership strands focus on:

- Leadership Framework & Competencies: The leadership framework is structured on the Nine Characteristics of High Performing Schools supported by McREL's Leadership Framework and the Educational Leadership Standards (ISLLC). Turn-Around Leadership Competencies will also support the leadership framework.
- Instructional Rounds: A network approach of improving teaching and learning at the instructional core through calibration visits and instructional classroom observations connecting Danielson's Framework to walk-through strategies.
- Professional Growth & Development: All participants complete a 360° Self-Assessment Evaluation provided by Education Impact. The information from this assessment helps each participant develop a professional growth plan to increase his or her effectiveness.
- Collegial Connection & Collaboration: Throughout the PALs project, there are many opportunities for all participants to network and connect through statewide ~~State-wide~~ summits, regional meetings, and individual coaching calls.

Because PALs is funded under the Title I-A Statewide System of Support, principals are selected based on their school's improvement status and whether the school receives Title I-A funds. They meet four times a year in addition to conference calls and regional working sessions. New participants will be selected based on the placement of the school in the new accountability structure proposed in Idaho's ESEA Flexibility application. Priority will be given to those in the lowest-performing schools.

- *Does the SEA propose to develop and disseminate high-quality instructional materials aligned with the new standards? If so, are the instructional materials designed (or will they be designed) to support the teaching and learning of all students, including English Learners, students with disabilities, and low-achieving students?*

~~The ISDE will create and implement a process for the continual vetting of quality instructional materials and provide access to such material on the ISDE website and on the statewide learning management system, Schoolnet.~~

According to Idaho Superintendent of Public Instruction Tom Luna's vision, "Every parent and educator will have access to the data they need to guide instruction on a daily basis and measure the academic progress of all students via Schoolnet." Schoolnet is Idaho's instructional Learning-mManagement sSystem (LMSIMS) which that delivers longitudinal data via a student Digital Backpack which consolidates state assessment results according to a growth model.



In addition, Schoolnet provides enrollment, completion, grades, Key Performance Indicators (KPIs), Goals & Exemplars, Formative and Summative Assessments and Reports as well as instructional materials, lesson plans and links to online resources.

Schoolnet is the online LMSIMS provider of data-driven decision-making solutions for Idaho K-12 school districts. Schoolnet coupled with intensive training occurring summer 2012 (<http://itcnew.idahotc.com/register-for-trainings.aspx>), helps districts analyze data, organize curriculum, track instruction, measure performance, and report results. Districts utilize data to make informed managerial and instructional decisions at all levels for all students including English Learners, students with disabilities, and low-achieving students.

There are several components to the informed instructional decision making process. In addition to Digital Backpack data, the provision of high quality instructional materials aligned to CCSSCommon Core State Standards developed according to the pPrinciples of Universal Design for Learning (UDL) assures that the needs of all students are met. Schoolnet is the portal to many different instructional resources designed to align with UDL.

High-quality digital instructional content (Discovery Education Streaming digital content) was provided through the Schoolnet LMS to every Idaho teacher and student across all Idaho classrooms in May 2012.

In addition to providing digital content hosted by Schoolnet according to the principles of UDL, Schoolnet also provides a portal for Idaho educators to an online database of lesson plans. To facilitate the uploading of lesson plans, the ISDEdaho SDE convened a panel of teachers and other UDL experts to design a template entitled 21st Century Classroom Lesson Plan which was developed according to the Charlotte Danielson Framework and the principles of UDL including multiple means of:

- Representation, to give diverse learners options for acquiring information and knowledge.
- Action and expression, to provide learners options for demonstrating what they know.
- Engagement, to tap into learners' interests, offer appropriate challenges, and increase motivation

The Idaho 21<sup>st</sup> Century Classroom UDL lesson plan template was designed with representation from 61 school districts, higher education institution representation as well as Idaho SDE directors and content coordinators across divisions. The template is now housed and accessible statewide within the Schoolnet LMS. Teachers log on and create lessons online then align these lessons with key subject/content words, grade level, CCSSCommon Core State Standards and Idaho standards as well as appropriate links to UDL resources and materials creating a searchable 21<sup>st</sup> Century Classroom UDL lesson plan database.



As Idaho educators create 21<sup>st</sup> Century Classroom UDL lesson plans online via the lesson plan template they are required to delineate UDL requirements and differentiated instructional techniques to meet the needs of all students including English Learners, students with disabilities, and low-achieving students and incorporate college and career readiness skills according to the ~~CCSS~~ Common Core State Standards. Information for Idaho educators on UDL can be found at the Idaho Assistive Technology Project at: [http://itcnew.idahotc.com/files/qrm/qrm\\_univdesign.pdf](http://itcnew.idahotc.com/files/qrm/qrm_univdesign.pdf)

Upon submission into the database the lesson plans will be reviewed online by a cadre of 21<sup>st</sup> Century Master Teachers specifically trained in UDL principles and exemplar best practice techniques by the ISDE and Idaho Assistive Technology Project Staff. During the spring and summer of the 2011-2012 school years this group of 50 21st Century Classroom Master Teachers are creating an exemplar library of lesson plans along with student work samples and UDL designed materials which will function as a resource for all Idaho tTeachers.

- *Does the SEA plan to expand access to college-level courses or their prerequisites, dual enrollment courses, or accelerated learning opportunities? If so, will this plan lead to more students having access to courses that prepare them for college and a career?*

Over the past five years, Idaho has significantly expanded the access to advanced opportunities for all students attending Idaho's public high schools. First, the Idaho State Board of Education and Idaho Legislature approved new graduation requirements in 2007 for the Class of 2013.<sup>11</sup> This was intended to ensure that high school graduates are better prepared for postsecondary education.

Under these new requirements, students must take three years of mathematics, three years of science, and a college entrance examination. School districts and public charter schools must offer high school students at least one advanced opportunity, such as dual credit, Advanced Placement, Tech Prep, or International Baccalaureate.

Second, over the past three years, the State has created the Idaho Education Network (IEN). This is a high-speed, broadband intranet connecting every Idaho public high school with each other and to Idaho's institutions of higher education. The IEN was made possible through a change in Idaho Code and then by leveraging Federal, State, and private funding to invest \$40 million into building. (See Idaho Code 67-5745D online at <http://legislature.idaho.gov/idstat/Title67/T67CH57SECT67-5745D.htm>.) In addition to providing connectivity, the ~~Network~~ IEN equipped at least one room in every high school with video conferencing equipment affording all students access to the educational opportunities they need, no matter where they live.

<sup>11</sup> Idaho's new high school graduation requirements are available online at <http://adm.idaho.gov/adminrules/rules/idapa08/0203.pdf> under IDAPA 08.02.03 104, 105, and 106.



The possibilities of the ~~Network~~ IEN are endless, and Idaho schools are just beginning to realize the value of this project. Currently, students are using the IEN to go on virtual field trips to places like the Great Barrier Reef or the Holocaust Museum. It is largely being used to take and complete courses not currently offered in a school or district, such as dual credit and Advanced Placement courses. The Idaho State Board of Education has set a goal for students to be taking 180,000 dual credits per year by 2020. Right now, approximately 8,000 students are taking 46,134 dual credit hours statewide. The IEN will help the State meet this goal by making sure every school and district has access to these courses. In 2011-12, more than 800 students were taking dual credits via the IEN. Eventually, the IEN also will expand to Idaho's elementary and middle schools as well as Idaho's community libraries.

Third, as part of comprehensive education reform laws passed in Idaho during the 2011 Legislative Session, a Dual Credit for Early Completers program was enacted. (For the full text of Idaho Code 33-1626, see <http://legislature.idaho.gov/idstat/Title33/T33CH16SECT33-1626.htm>.) In this program, students who complete all State high school graduation requirements, except their senior project, not later than the start of the twelfth grade are eligible to enroll in up to thirty-six (36) postsecondary credits of dual credit courses during their twelfth grade year at State expense. The State expects the program to grow in future years as students learn about the program through their schools.

Fourth, Idaho passed a new law to change the State's public school funding formula so funds follow the student through Fractional Average Daily Attendance (ADA). Fractional ADA will first go into effect for 2012-13.

In the past, school districts received full units of funding for students attending their schools, even if students only attended part of the day.

Through Fractional ADA, the State will divide school-day funding into segments to ensure the funds follow a student if he or she chooses to supplement their traditional education at a high school with online courses, dual credit courses, or other options such as professional-technical courses at a neighboring school district. Thus, Idaho's college and universities, other school districts, and online courses providers become eligible for a fraction of ADA funding for students participating in their courses during the school day. This will allow more students to take college-level courses, AP courses, or other courses not offered at their high school.

Finally, in the State's new accountability system, Idaho will hold public high schools accountable for the number of students who enroll in and successfully complete advanced courses, such as dual credit, Advanced Placement, Tech Prep, or International Baccalaureate.



Under this new system, Idaho high schools will earn more points toward becoming a Five-Star School if more students enroll in and successfully complete an advanced opportunity course<sup>12</sup>.

ISDE decided to make this a component of the new accountability system to encourage more school districts and high schools to offer advanced opportunities.

- *Does the SEA intend to work with the State's IHEs and other teacher and principal preparation programs to better prepare—*
  - *incoming teachers to teach all students, including English Learners, students with disabilities, and low-achieving students, to the new college- and career-ready standards; and*
  - *incoming principals to provide strong, supportive instructional leadership on teaching to the new standards?*

*If so, will the implementation of the plan likely improve the preparation of incoming teachers and principals?*

ISDE has worked with the Idaho State Board of Education (“State Board”) and Idaho’s institutions of higher education (IHEs) to improve the preparation programs for classroom teachers and principals to ensure they have the skills and knowledge necessary to prepare all students to meet college- and career-ready standards.

ISDE and State Board staff first worked to align teacher preparation programs to the Common Core State Standards in 2011.

In August 2011, ISDE presented a proposed change in Idaho Administrative Rule to the State Board. The rule was adopted by the Board on November 3, 2011. It ~~was approved by the~~ now will go before the House and Senate Education Committees of the Idaho Legislature in January 2012 ~~for final approval~~ to become effective.

The ISDE is working with institutions of higher education and other teacher preparation programs ~~during the current school year~~ to explain the changes in the teacher preparation program approval process and how they can best meet these new requirements. (For more on IDAPA 08.02.02.100, see <http://adm.idaho.gov/adminrules/rules/idapa08/0202.pdf>.)

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<sup>12</sup> In Idaho Administrative Rule, advanced opportunity courses are defined as dual credit, Advanced Placement, Tech Prep, or International Baccalaureate courses. See *IDAPA 08.02.03.106*.



Under the rule change, the ISDE would redesign the approval process for teacher preparation programs to ensure Colleges of Education and other preparation programs are producing candidates who have the skills and knowledge necessary to effectively teach the Common Core State Standards to all students, including English language learners, students with disabilities and low-achieving students.

The rule change provides the State Board more oversight of the teacher preparation approval process through focused reviews of preparation programs aligned to State-specific, core teaching requirements. Teacher preparation programs must demonstrate they are meeting these goals no later than 2014-15 in order to receive approval.

The State will measure the effectiveness of teacher preparation programs in two ways. First, focused reviews will be conducted in person. Once the rule change is effective, the State reviews of the preparation programs will be conducted every third year to specifically monitor candidate performance data in the following areas:

- Integration of appropriate educational technology into lesson plans and curriculum.
- Evidence of candidate knowledge and skill related to Common Core State Standards in mathematics instruction. ISDE is in the early stages of developing the framework for this evaluation, but it will include the components of the Mathematical Thinking for Instruction course for elementary school teachers, application of statistics for secondary school teachers and pre-service standards aligned to the Common Core State Standards. ISDE currently is working with groups of teachers, school administrators, and higher education faculty to develop the pre-service standards aligned to the Common Core.
- The State is using Total Instructional Alignment (TIA); another recognized professional development strategy. TIA work already has begun in Idaho and will continue in 2012 with the assistance of ISDE staff.
- Evidence of candidate knowledge and skill related to Common Core State Standards in English language arts instruction. ISDE is in the early stages of developing the framework for this evaluation, but it will include pre-service standards aligned to the Common Core State Standards as well as competencies specifically addressing the needs of English language learners and students with disabilities.
- The ISDE currently is working with groups of teachers, school administrators, and higher education faculty to develop the pre-service standards aligned to the Common Core. The State is also using the TIA methodology for this work; work already begun and which will continue in 2012 with the assistance of ISDE staff.



- Evidence of growth through clinical practice culminating in a professional development plan for the beginning teacher. Supervision of clinical practice will be aligned with the Idaho Statewide Framework for Teacher Performance Evaluations, based on the Charlotte Danielson Framework for Teaching.

Through this alignment, the State will support a continuum of growth beginning in pre-service and provide a consistent construct for supporting teachers in their development towards becoming highly effective practitioners.

Second, the State will measure the effectiveness of teacher preparation programs through the use of longitudinal data. With the Statewide longitudinal data system, Idaho can connect candidates back to the teacher preparation programs they attended. Idaho first implemented its statewide longitudinal data system in 2010-11. Thus, the first data on teacher preparation programs are expected to become available at the end of 2011-12.

This data element will be one of the multiple measures used to evaluate the success of Idaho's Colleges of Education and other teacher preparation programs. Idaho has also participated in Stanford's Teacher Performance Assessment Consortium (TPAC) and will continue to participate with a focus on assessing the performance of ABCTE (American Board for Certification of Teacher Excellence) candidates.

Idaho already has made significant progress in aligning the standards in the Colleges of Education and other teacher preparation programs to the Common Core State Standards through the statewide Idaho Math Initiative. The Idaho Math Initiative has been described above in considerable detail.

The ISDE and State Board now are beginning to address necessary changes to administrator preparation programs that will make sure all principals recognize their roles as instructional leaders who have the skills and knowledge necessary to prepare all students to meet college- and career-ready standards.

Currently, under Idaho Code and Idaho Administrative Rule, the State does not have authority over principal preparation programs. These are the steps the State is taking to address administrator preparation programs.

First, the ISDE has brought together stakeholders from across Idaho to develop a statewide framework for administrator evaluations. The ISDE conducted similar work in 2008 to create a Statewide Framework for Teacher Performance Evaluations based on the Charlotte Danielson Framework for Teaching. Under Idaho Code, Idaho's certificated staff, including administrators, must be evaluated at least annually; however, neither Code nor Administrative Rule sets standards upon which administrators will be evaluated. Therefore, evaluations vary from district to district and school to school.



In December 2011, the ISDE convened a steering committee and a larger stakeholder group to craft the framework for administrator evaluations in Idaho. The steering committee meets monthly to plan future meetings for the larger stakeholder group, evaluate past meetings from the stakeholder group and make sure the work of the stakeholder group is keeping consistent with State and Federal requirements as well as research. The stakeholder group meets monthly to work on creating the framework for administrator evaluations.

The working group is made up of the following participants: Rob Winslow, Executive Director of the Idaho Association of School Administrators; Karen Echeverria, Executive Director of the Idaho School Boards Association; Robin Nettinga, Executive Director of the Idaho Education Association; Christina Linder, Director of Certification and Professional Standards at the ISDE; Steve Underwood, Director of the Statewide System of Support at the ISDE; Becky Martin, Coordinator of Teacher Quality at the ISDE; and Rob Sauer, Deputy Superintendent of Great Teachers and Leaders Division at the ISDE.

The stakeholder group is made up of the following participants:

- Wiley Dobbs, superintendent in Twin Falls School District
- Geoff Standards, principal in Meridian School District
- Shalene French, principal in Idaho Falls School District
- Alicia Holthaus, principal in Grangeville
- Anne Stafford, teacher in Boise School District
- Nancy Larsen, teacher at Coeur d'Alene Charter Academy
- Chuck Wegner, curriculum director in Pocatello School District
- Marni Wattam, special education director in Post Falls School District
- Penni Cyr, Idaho Education Association President
- Dave Anderson, school board trustee in Oneida School District
- Mike Vuittonet, school board trustee in Meridian School District
- Cathy Canfield-Davis, higher education representative in Moscow
- Kathleen Budget, higher education representative in Boise
- Laurie Boeckel, Idaho PTA representative
- Selena Grace, Office of the State Board of Education
- Roger Brown, Office of the Governor
- Senator John Goedde, Idaho Legislature
- Senator James Hammond, Idaho Legislature
- Senator Steve Bair, Idaho Legislature

While there is consensus among stakeholders that instructional leadership will be a primary component in the State's evaluation system, corollary performance measures have yet to be determined. The group plans on concluding its work by the end of May 2012.



At the completion of the ISDE's work to develop a statewide framework for administrator evaluations, the State will propose redesigning the principal preparation program approval processes to ensure these programs align with statewide standards and measures. This timeline and process is fully described in Section 3 of this application.

- *Does the SEA plan to evaluate its current assessments and increase the rigor of those assessments and their alignment with the State's college- and career-ready standards, in order to better prepare students and teachers for the new assessments through one or more of the following strategies:*
  - *Raising the State's academic achievement standards on its current assessments to ensure that they reflect a level of postsecondary readiness, or are being increased over time to that level of rigor? (E.g., the SEA might compare current achievement standards to a measure of postsecondary readiness by back-mapping from college entrance requirements or remediation rates, analyzing the relationship between proficient scores on the State assessments and the ACT or SAT scores accepted by most of the State's 4-year public IHEs, or conducting NAEP mapping studies.)*
  - *Augmenting or revising current State assessments by adding questions, removing questions, or varying formats in order to better align those assessments with the State's college- and career-ready standards?*
  - *Implementing another strategy to increase the rigor of current assessments, such as using the "advanced" performance level on State assessments instead of the "proficient" performance level as the goal for individual student performance or using college-preparatory assessments or other advanced tests on which IHEs grant course credits to entering college students to determine whether students are prepared for postsecondary success?*

*If so, is this activity likely to result in an increase in the rigor of the State's current assessments and their alignment with college- and career-ready standards?*

Idaho will focus all of its resources and efforts on moving to the next generation of assessments and building capacity at the local level to implement these new assessments.

The next generation of assessment includes, but is not limited to, Idaho's involvement in the [SMARTER-Smarter](#) Balanced Assessment Consortium (SBAC). Idaho will pilot the SBAC assessments in the 2013-2014 school year and fully implement these assessments in the 2014-2015 school year.



| In addition to its work with SBAC, Idaho is developing a statewide item bank from which school districts and public charter schools can develop quality assessments at the local level that are aligned to the Common Core State Standards.

In November 2010, ISDE worked with more than 50 mathematics and science teachers to create end-of-course assessments in six courses: biology, earth science, physical science, pre-algebra, algebra I, and geometry. Because of this work, each subject area now has roughly 350 items in it and one complete form of each assessment. These tools now are available to all school districts and public charter schools to be used as end-of-course tests or as benchmark or interim tests throughout the school year.

Since the State received a grant from the J.A. and Kathryn Albertson Foundation to deploy an instructional management system across Idaho, the SDE also will begin loading these assessment items into the Schoolnet system (described in detail previously in this section).

| The grant funding from the Albertson Foundation also is allowing ISDE to create a bank of assessment items constructed of items from other States and Idaho school districts, all of which are first aligned to the Common Core State Standards. Through the timeline below, numerous Idaho teachers will be invited to item alignment workshops to conduct the alignment and learn how to effectively use formative practices and interim assessments aligned to the Common Core State Standards. The alignment activity also will serve as an outreach and professional development opportunity as it will significantly increase teacher understanding and awareness of the Common Core.



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**Table 3  
Timeline of Idaho Interim Assessment Item Bank**

By October 30, 2011	2,500 items loaded and available to create tests	2,500 items	Science and Math <del>EOCs</del> end-of-course assessments (EOCs)- Currently available in Schoolnet are: Pre-Algebra, Algebra, Geometry (1,402 items); and Earth Science, Physical Science, and Biology (1,124 items.)
By January 16, 2012	3,000 items loaded and available to create tests	2,000 state items 1,000 district items	Primarily Math Gr. 3-8 with some ELA and Science. Primarily upper level Math & Language Arts/ English as well as some Science.
By February 20, 2012	2,000 additional items	1,200 state items 800 district items	Same priorities as above with further expansion into science.
By March 19, 2012	2,500 additional items	1,500 state items 1,000 district items	Same priorities as above with expansion into Social Studies.
By June, 2012	5,000 additional items	5,000 state items	The ISDE will continue to add state released items until there is a sufficient number in grades 3-12. The SDE will also look into adding items for K-2.

Idaho has consulted with the Technical Advisory Committee in possible ways to gain more information on students' performance on the Common Core State Standards by utilizing the current ISAT. One potential, still in discussion, is the possibility of coding current items, if applicable, to the Common Core State Standards and giving a holistic Common Core score to for students in addition to the current reported score. Idaho is still investigating the possibilities with the TAC.

- *Does the SEA propose other activities in its transition plan? If so, is it likely that these activities will support the transition to and implementation of the State's college- and career-ready standards?*

All plans are outlined in the previous sections.



**1.C DEVELOP AND ADMINISTER ANNUAL, STATEWIDE, ALIGNED, HIGH-QUALITY ASSESSMENTS THAT MEASURE STUDENT GROWTH**

- 1.C** Did the SEA develop, or does it have a plan to develop, annual, statewide, high-quality assessments, and corresponding academic achievement standards, that measure student growth and are aligned with the State's college- and career-ready standards in reading/language arts and mathematics, in at least grades 3-8 and at least once in high school, that will be piloted no later than the 2013–2014 school year and planned for administration in all LEAs no later than the 2014–2015 school year, as demonstrated through one of the three options below? Does the plan include setting academic achievement standards?

Option A:

*If the SEA is participating in one of the two State consortia that received a grant under the Race to the Top Assessment (RTTA) competition, did the SEA attach the Memorandum of Understanding (MOU) submitted under that competition? (Attachment 6)*

Idaho is a governing state in the ~~SMARTER~~-Smarter Balanced Assessment Consortium. See Attachment 6 - ~~SMARTER~~-Smarter Balanced Assessment Consortium for the Memorandum of Understanding

**PRINCIPLE 1 OVERALL REVIEW**

*Is the SEA's plan for transitioning to and implementing college-and career-ready standards, and developing and administering annual, statewide, aligned high-quality assessments that measure student growth, comprehensive, coherent, and likely to increase the quality of instruction for students and improve student achievement? If not, what aspects are not addressed or need to be improved upon?*

The Idaho State Department of Education (ISDE) has built a strong plan to transition to and implement college- and career-ready standards that is sound, comprehensive, and attainable within the timelines established in the above narrative. The State has demonstrated extensive plans to strengthen professional development for current classroom teachers and principals and to align teacher and principal preparation programs with Common Core Standards. ISDE also is working with the State Board to ensure the State measures the effectiveness of teacher and principal preparation programs every year and holds these programs accountable for their outcomes.

The State is making significant progress to improve its already rigorous annual statewide assessments as it transitions to Common Core State Standards. Idaho is adding additional measures of student achievement, such as interim assessments, which classroom teachers and building principals can use throughout the school year to guide instruction and raise achievement for all students, including students with disabilities, English language learners and low-achieving students.



Through these efforts, Idaho is creating a consistent, comprehensive, and sustainable infrastructure that promotes quality instruction in every classroom while offering effective support to all students as they progress toward mastery of college- and career-ready standards.

## PRINCIPLE 2: STATE-DEVELOPED DIFFERENTIATED RECOGNITION, ACCOUNTABILITY, AND SUPPORT

### PRINCIPLE 2: INTRODUCTION

ESEA Flexibility permits Idaho to build on its successes. Like others, Idaho saw increasing numbers of schools identified for improvement. This reversed beginning in 2008 and through 2011 (declining from 46%, to 40%, to 31% and 31% in each respective year), despite increasing benchmarks. Meanwhile, student achievement increased statewide from 2007 to 2011. The median combined percent of school-level student proficiency on the state test for Reading and Math increased 4.9 points for all students (to 84.7%) and 7.8 points among the economically disadvantaged (to 79.2%). Gains steadily rose each year, which is encouraging since Idaho's 4<sup>th</sup> and 8<sup>th</sup> grade NAEP scores in these areas are equal to or statistically higher than the national average. Idaho attributes this success largely to changes in its Statewide System of Support.

However, this success is not yet enough. There have been modest gains among English learners and students with disabilities. With the Common Core State Standards, achievement for all students must be raised even higher still. Therefore, Idaho will continue with a single accountability system for all schools, regardless of Title I status, using a Five-Star scale to annually evaluate and recognize school performance. The system of differentiated recognition, accountability, and support will enable the State to diagnose and more adequately meet the needs that exist in its schools and districts.

Schools and districts will be evaluated based on four metrics: absolute performance (percent of students who are proficient), student academic growth to standard for all students, academic growth to standard for equity groups, and postsecondary and career readiness. These metrics are incorporated in a compensatory framework in which schools and districts accumulate points in subdomains along a continuum of performance. Points accumulated will result in annual determinations based on a Five-Star scale. The State's goal is to get all of its schools and districts into the highest two categories: Four and Five Stars. These are reserved for schools and districts that effectively meet the needs of all students across the various metrics of performance.

The One, Two, and Three Star categories will be used to identify schools and districts for differentiated levels of accountability and support. Support mechanisms for all schools and districts focus with the greatest intensity on the lowest-performing systems. The Statewide System of Support's processes and programs strategically determine what the lowest-performing schools and districts need, match resources and supports to those needs, and work to build the capacity of the district in order to improve the outcomes of its schools.



**2.A DEVELOP AND IMPLEMENT A STATE-BASED SYSTEM OF  
DIFFERENTIATED RECOGNITION, ACCOUNTABILITY, AND SUPPORT**

2.A.i Provide a description of the SEA's differentiated recognition, accountability, and support system that includes all the components listed in Principle 2, the SEA's plan for implementation of the differentiated recognition, accountability, and support system no later than the 2012–2013 school year, and an explanation of how the SEA's differentiated recognition, accountability, and support system is designed to improve student achievement and school performance, close achievement gaps, and increase the quality of instruction for students.

*2.A.i.a. Did the SEA propose a differentiated recognition, accountability, and support system, and a high-quality plan to implement this system no later than 2012 school year, that is likely to improve student achievement and school performance, close achievement gaps, and increase the quality of instruction of students?*

**a.** *Does the SEA's accountability system provide differentiated recognition, accountability, and support for all LEAs in the State and for all Title I schools in those LEAs based on (1) student achievement in reading/language arts and mathematics, and other subjects at the State's discretion, for all students and all subgroups of students identified in ESEA section 1111(b)(2)(C)(v)(II); (2) graduation rates for all students and subgroups; and (3) school performance over time, including the performance and progress of all subgroups?*

Idaho's single accountability system is one that has a foundation in rewarding schools and districts for not only excellent performance but also strong growth and measures that indicate preparation for postsecondary and career readiness. Idaho's focus on building local capacity to improve achievement over the course of ESEA, has illustrated that schools can make significant progress and yet are still considered failing under a restrictive definition. Safe harbor calculations do not go far enough to illustrate the kind of growth achieved by many of these schools.

An achievement-only based system provides a disincentive for focus on seemingly unachievable goals for many students and subgroups with low achievement. Conversely, the growth measures to achievement included in Idaho's system provide a stronger focus on the possibilities for subgroups and, in turn, serve as an incentive for schools to focus on increasing subgroup performance. Idaho's plan not only addresses achievement gaps among subgroups, but also for students who may not be members of any one of the designated groups who are low achieving. Through calculations to address growth to proficiency (see Adequate Student Growth Percentile description), students who are not making growth sufficient to get to proficiency within three years or by 10<sup>th</sup> grade, whichever comes first, are identified and schools are rated accordingly.

Idaho's Accountability System includes four measures and plus the rate of participation in State assessments. The four measures are outlined in Table 4.



1. Reading, mathematics, and language usage achievement (proficiency) designations for all students;
2. Graduation rates for all students<sup>13</sup>
3. Growth and growth toward proficiency for all students and subgroups over time; and
4. For schools with grade 12, increasing advanced opportunities and ensuring college-readiness through college entrance and placement exams.

The details that follow are organized into two main sections. First, a full description of the measures, standards, and accountability system are outlined in *Differentiated Recognition and Accountability*. Second, the *Rewards and Sanctions* section articulates the core support components to provide differentiated support systems and details the rewards, recognition, and required improvement actions.

#### PART I: DIFFERENTIATED RECOGNITION AND ACCOUNTABILITY

Idaho's accountability metric is based on a Five-Star rating system. Idaho chose to use the star system for several reasons. First, the State believes it is important to provide easily understood information to parents and constituents about the performance of the schools and district in their community. A star rating system has been used in numerous venues with broad understanding across constituencies. Second, a system, like grading, that has become too widely associated with percentages would confine Idaho in setting its specific goals for the targets a high-achieving school and district must meet (i.e. a Five-Star school is not one that meets 90 percent of the benchmarks; the typical cut point for an A). Third, Idaho wanted a system that rewards schools and districts and creates an incentive for improvement. With a star rating system, schools deemed to be a Three-Star school can demonstrate the achievement and growth areas of exceptional performance but also focus on what it takes to reach a Four-Star and Five-Star rating without the stigma of being labeled failing overall.

Idaho has built a single system that seamlessly identifies Priority and Focus Schools as One- and Two-Star schools, respectively. The rationale and explanation of how this single identification protocol works is detailed in Sections 2D and 2E.

<sup>13</sup> Idaho was granted a waiver due to late implementation of its longitudinal data system. The 4-year, cohort-based graduation rate will be fully implemented by 2013-14. At that time, Idaho will also be able to report subgroup graduation rates. See Attachment 13



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**Table 4  
Idaho Accountability Measures**

<b>Idaho's Accountability Measures</b>					
	<b>Achievement</b>	<b>Growth to Achievement</b>	<b>Growth to Achievement Subgroups</b>	<b>Post-secondary and Career Readiness</b>	<b>Participation</b>
<b>Points/Weight</b> <i>Schools with Grade 12</i> <i>All other Schools</i>	20 points 25 points	30 points 50 points	20 points 25 points	30 points N/A	Star Rating Change
<b>Measure</b>	<b>Idaho Standards Achievement Tests (ISAT)</b>  <b>Idaho Standards Achievement Tests- Alternate (ISAT-Alt)</b> <ul style="list-style-type: none"> <li>Reading (33.3%)</li> <li>Language Usage (33.3%)</li> <li>Mathematics (33.3%)</li> </ul>	<b>Idaho Growth Model</b> <ul style="list-style-type: none"> <li>Reading (33.3%)</li> <li>Language Usage (33.3%)</li> <li>Mathematics (33.3%)</li> </ul>	<b>Idaho Growth Model</b> <ul style="list-style-type: none"> <li>Reading (33.3%)</li> <li>Language Usage (33.3%)</li> <li>Mathematics (33.3%)</li> </ul>	<b>Graduation Rates</b> <del>(33.350%)</del>  <b>College Entrance/Placement Exams</b> <del>(33.325%)</del>  <b>Advanced Opportunities</b> <del>(33.325%)</del>	<b>Participation rate (100%)</b>
<b>Standard</b>	% of students proficient and advanced	<b>Median Student Growth Percentile (SGP)</b> Normative growth relative to like peers  <b>Adequate Student Growth Percentile (AGP)</b> Criterion referenced growth relative to proficiency target.	<b>Disaggregated subgroups:</b> <ul style="list-style-type: none"> <li>Free/Reduced Lunch Eligible</li> <li>Minority Students</li> <li>Students with Disabilities</li> <li>Limited English Proficient Students</li> </ul> <b>Median Student Growth Percentile (SGP)</b> Normative growth relative to like peers	<b>Graduation rate</b>  <b>College Entrance / Placement</b> % of students reaching the college readiness score on SAT, ACT, ACCUPLACER or COMPASS  <b>Advanced Opportunities</b> % of total eligible students	<b>Participation Rate</b> Schools and Districts must test 95% of all students and all subgroups in each subject on the ISAT and ISAT-Alt. Participation rates less than 95% will result in a decrease <u>to at least a Three Star</u> or by one star the overall school



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Idaho's Accountability Measures					
	Achievement	Growth to Achievement	Growth to Achievement Subgroups	Post-secondary and Career Readiness	Participation
				(juniors and seniors)	
			<b>Adequate Student Growth Percentile (AGP)</b> Criterion referenced growth relative to proficiency target	completing at least one AP, IB, dual credit or Tech Prep course.  % of student completers reaching receiving a C or better in an AP, IB, dual credit or Tech Prep course	or district rating.

## ACHIEVEMENT

The achievement metric measures school and district performance toward the academic standards assessed on the Idaho Standards Achievement Tests (ISAT) and alternate (ISAT-Alt) in reading, language usage, and mathematics. The determination is based on the percentage of students at the proficient or advanced category. Points are given on a scale indicating higher points for a performance at proficient or advanced.

Table 5 is the point distribution for the achievement categories:



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**Table 5  
Achievement Points Eligible**

Percent Proficient and Advanced	Points Eligible
95% - 100%	5
84% - 94%	4
65% - 83%	3
41% - 64%	2
≤ 40%	1

Idaho will report for each school and district the points earned for the achievement metric as in Table 6. Each school and district will earn points based on the proficiency percentages for reading, language usage, and mathematics.

**Table 6  
Achievement Point Distributions**

Achievement	Points Earned	Points Eligible	N	% Proficient	% Advanced	Total %
Reading		5				
Language Usage		5				
Mathematics		5				
Total		15				
Percentage of Points	Total/15=X%					
Total Points Awarded	X * 20 (Schools with Grade 12) X * 25 (All other Schools)					

The percentage of points awarded will be scaled for the total points for schools to the appropriate weighting. For example, an elementary school that receives 13/15 points will have received 86.7% of the points and will be given 22 of the 25 total points for this metric. A high school that receives the same 13/15 points will be given 17 out a total of 20 points.



## GROWTH TO ACHIEVEMENT AND GROWTH TO ACHIEVEMENT SUBGROUPS

Idaho's growth measure uses the Student Growth Percentiles (SGP; also known as the Colorado Growth Model) to create both a normative measure of growth and a criterion-based measure. This combination is an important distinction in that growth alone is an insufficient measure. Growth must become proficiency or the measure of growth provides no better measure than proficiency alone. The first measure, normative growth, provides a median growth percentile for each subject area in each school. The normative growth measure calculates a growth percentile based on comparing like students or in other words, students who have scored in the same score range on the ISAT in the previous year.

Then, considering where a student scores in the current year, he or she is given a growth percentile. The Median Student Growth Percentile (SGP) is then assigned for each subject area and to an overall median percentile for each school and district.

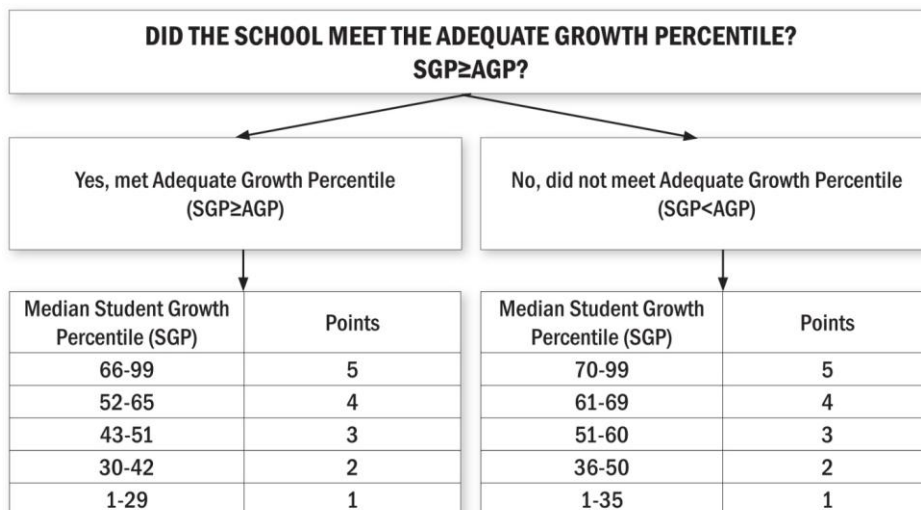
However, a normative measure is not sufficient without a criterion to ensure each student will eventually reach proficiency. The second measure, the criterion growth measure or Adequate Student Growth Percentile (AGP), is a further calculation for each student. The AGP calculates the required percentile of growth needed for a student to reach or maintain proficient or advanced within three years or by 10<sup>th</sup> grade, whichever comes first. These measures are calculated for students in each subject area (reading, language usage and mathematics). The Growth to Achievement and Growth to Achievement Subgroups indicators use two different scoring matrices depending on whether or not the median growth percentile of the school or subgroup meets or exceeds the adequate growth needed for that school or subgroup. Growth to Achievement and Growth to Achievement Subgroups are evaluated first based on the criterion of whether or not the growth rate is adequate for the typical or median student in the school/subgroup to reach or maintain a performance level of proficient or advanced within three years or by 10<sup>th</sup> grade, whichever comes first. Academic growth and academic growth gaps are then evaluated based on a normative comparison to other schools. The three questions below determine the targets for each school and district.

- (1) What was my school or district's median student growth percentile (SGP)?
- (2) What was my school or district's median adequate growth percentile (AGP), the growth percentile needed for the typical student in my school or district, to reach proficient or advanced within three years or by 10<sup>th</sup> grade?
- (3) Did my school meet adequate growth? If yes, follow the scoring guide for "Yes, met adequate growth." If no, follow the scoring guide for "No, did not meet adequate growth."

Answering these questions results in a selection of a Growth to Achievement and Growth to Achievement Subgroups rating. This is due to the emphasis placed on moving students who are farther behind faster. Table 7 is the scoring guide and point allocation for each subject area for each school and district.



**Table 7**  
**Adequate Growth Flowchart**



**For example:**

- What was my school's median growth percentile in elementary math? **87**
- What was my school's median adequate growth percentile in elementary math? **83**
- Did my school meet adequate growth in elementary math? **Yes**, my growth was adequate because my median growth percentile (SGP) in elementary math is more than my median adequate growth percentile (AGP) in math. **Using the YES scoring guide**, my growth in elementary math earns me **FIVE points**.



## GROWTH TO ACHIEVEMENT

**Table 8**  
**Growth to Achievement Distributions**

Growth to Achievement	Points Earned	Points Eligible	N	Median Student Growth Percentile (AGP)	Median Student Adequate Growth Percentile (SGP)	Made Adequate Growth?
Reading		5				
Language Usage		5				
Mathematics		5				
Total		15				
Percentage of Points	Total /15 =X%					
Total Points Awarded	X * 30 (Schools with Grade 12) X * 50 (All other Schools)					

The percentage of points awarded will be scaled for the total points for schools to the appropriate weighting. For example, an elementary school that receives 13/15 points will have received 86.7% of the points and will be given 43 of the total points 50 for this metric. A high school that receives the same 13/15 points will be given 26 out of a total of 30 points.

## GROWTH TO ACHIEVEMENT SUBGROUPS

Growth to Achievement Subgroups are calculated exactly the same as Growth to Achievement (with both the Median Student Growth Percentile and Adequate Student Growth Percentile). For this measure, those calculations are applied to the following subgroups to determine SGP and AGP noted as an “At-Risk Subgroup”:

- Free and Reduced Lunch Eligible
- Minority Students
- Students with Disabilities
- Limited English Proficient Students (LEP)

**Free and Reduced Lunch (FRL) Eligible** – FRL eligibility will still be used to represent the subgroup of students who live in families which are economically disadvantaged. The State is not making any change to the definition of this subgroup.

**Racial and Ethnic Equity (Minority Students)** – Idaho is not a very racially or ethnically diverse State; approximately 85% of the population is white. However, ISDE is strongly committed to educational equity among racial and ethnic groups. In smaller school districts, the lack of racial and ethnic diversity virtually precludes reporting by race or ethnicity group.



This has been an obstacle to equity in the past. Therefore, the State has changed two aspects of its accountability plan to particularly address the issue of masked ethnicity groups. First, the minimum N count for all metrics has been reduced from  $N \geq 34$  to  $N \geq 25$ . Second, minority students are classified into one ethnic equity group. While combining across defined student groups is not a guarantee of attaining large enough numbers for reporting ( $N \geq 25$ ), it increases the probability of highlighting potential disparities. Minority students are defined as all students who are coded in one of the following race categories: American Indian/Alaskan Native, Asian, Black/African American, Hawaiian/Other Pacific Islander, Hispanic or Latino, and two or more races. While these race and ethnicity categories will be combined for the accountability matrix, they will continue to be reported publicly by each individual classification.

**Students with Disabilities** – The State is not making any change to the definition of this subgroup. It is comprised of students with an Individual Education Plan (IEP) as defined by the eligibility requirements outlined in the Idaho Special Education Manual.

**Limited English Proficiency (LEP)** – Students who are defined as Limited English Proficient are determined as such through Idaho's ELL placement test and are served through LEP programs within Idaho districts. Idaho also defines students in the U.S. school system for the first year to be LEP1 students. Currently, these students take the Idaho English Language Assessment (IELA) and, therefore, are exempted from taking the ISAT Reading and ISAT Language Usage tests; however, LEP 1 students must take the ISAT Math. The scores for LEP1 students are not included in the proficiency calculations for schools or districts. Idaho will continue this practice and the definition of LEP students will remain the same. ~~In addition, Idaho will also remove LEP students within the first three years (LEP1, LEP2, LEP3) of being new to a US school from the Achievement calculations. LEP2 and LEP3 students will be included in the Growth to Achievement and Growth to Achievement Subgroups calculations. With the introduction of the growth model, districts and schools will be afforded the opportunity to illustrate the growth and progress made toward proficiency without the penalty of not proficient students who are still learning the English language. This methodology will allow the school system to make sufficient progress in English proficiency instruction prior to a determination about subject area proficiency, while at the same time holding the school accountable for the student's growth in those areas.~~

Due to the limited sizes of most subgroups in Idaho, Idaho will deploy the following business rules in the subgroup calculations. Idaho will ~~first~~ calculate the Growth to Achievement Subgroups by each of the four listed subgroups (LEP, Students with Disabilities, Free and Reduced Lunch eligible students, Minority Students) into one "At-Risk Subgroup" for each school. If a school has all four subgroups, those subgroups will be calculated based on the performance of each subgroup. However, given that a large number of The majority of Idaho schools do not have subgroups that meet the  $N \geq 25$  threshold, so this is how Idaho is ensuring that all students who traditionally have been identified as having gaps in performance, will be accounted for by combining those four groups into one subgroup. Each student, regardless of multiple subgroup designations, shall only be counted once in the total subgroup for purposes of calculating the Growth to Achievement subcategory.



The median growth will be calculated for that total subgroup for each subject area. If a school has no subgroups, even after combining all four of the identified subgroups, the points eligible for the Growth to Achievement Subgroups shall be awarded based on the overall Growth to Achievement of the school.

This methodology uses an ~~two-fold~~ approach to ensure students most at risk are identified in some way. ~~Idaho first will award points for subgroups. If that is not possible,~~ Idaho will combine the subgroups to ensure those students' ~~G~~growth to ~~A~~achievement is built into the accountability matrix. Under the current system and without this grouping, it ~~would be~~ is possible and happens frequently for small subgroups of students to only be accounted for in the overall calculations and, therefore, masking their performance or gaps. In the preliminary 2010-2011 calculations, only 40 out of 630 schools met the  $N \geq 25$  threshold to have subgroup reporting in all subject areas and all four subgroups. An additional 16 schools had subgroups large enough for at least 10 of the 12 subgroup reporting categories. Conversely, with the "At-Risk" Subgroup definition, 535 out of 630 schools had a subgroup reporting in all three subject areas. This methodology includes all but 95 (15%) of Idaho schools without a subgroup reporting. For those schools without an "At-Risk" Subgroup, Idaho will employ a three-year median calculation to increase the N size and provide greater focus on subgroups. The three-year median methodology will include an additional 62 schools out of the 95 leaving only 33 schools without some kind of subgroup reporting. The three-year median will be deployed beginning with 2011-2012 data (only one year of data), adding a second year of data in 2012-2013 and the third year in 2013-2014. This is a significantly higher threshold and encompasses more attention to at-risk students than the singular group reporting and far more attention than even the Adequate Yearly Progress reporting has ever required.

To ensure focused efforts on the correct students, All ESEA subgroup performance, including public reporting separately all ethnicity and races, will continue to be publicly reported as is currently the practice by Idaho for groups of  $N \geq 10$ . Therefore, in the Idaho Report Card, schools will have public proficiency and growth reporting for all races and ethnicities, free/reduced lunch eligible, students with disabilities, and Limited English Proficient students. This reporting provides transparency as well as and assists in highlighting the greatest needs. This reporting will also be used in building plans for One-, Two- and Three-Star Schools.

Schools will receive a report that utilizes the elements reported in Table 9 for the Star Rating system.



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**Table 9  
Growth to Achievement Subgroups Distribution**

Growth to Achievement <u>At-Risk</u> Subgroups	Points Earned	Points Eligible	N	Median Student Growth Percentile (SGP)	Median Adequate Growth Percentile (AGP)	Made Adequate Growth?
<b>Reading</b>		<b>20</b>				
<del>Free/Reduced Lunch Eligible</del>		<del>5</del>				
<del>Minority Students</del>		<del>5</del>				
<del>Students with Disabilities</del>		<del>5</del>				
<del>Limited English Proficient Students</del>		<del>5</del>				
<b>Language Usage</b>		<b>20</b>				
<del>Free/Reduced Lunch Eligible</del>		<del>5</del>				
<del>Minority Students</del>		<del>5</del>				
<del>Students with Disabilities</del>		<del>5</del>				
<del>Limited English Proficient Students</del>		<del>5</del>				
<b>Mathematics</b>		<b>20</b>				
<del>Free/Reduced Lunch Eligible</del>		<del>5</del>				
<del>Minority Students</del>		<del>5</del>				
<del>Students with Disabilities</del>		<del>5</del>				
<del>Limited English Proficient Students</del>		<del>5</del>				
<b>Total</b>		60				
<b>Percentage of Points</b>	Total/60 = X%					
<b>Total Points Awarded</b>	X * 20 (Schools with Grade 12) X * 25 (All other Schools)					

The percentage of points awarded will be scaled for the total points for schools to the appropriate weighting. For example, ~~an elementary~~ a high school that receives 50/60 points will have received 83.3% of the points and will be given 17 of the 20 total points for this metric. ~~A high~~ An elementary school that receives the same 50/60 points will be given 21 out a total of 25 points.



## POSTSECONDARY AND CAREER READINESS

Idaho has created a foundation for rewarding schools and districts that increase the postsecondary and career readiness of their students. In 2007, the Idaho State Board of Education (ISBE “State Board”) and Idaho Legislature approved an administrative rule (which has the force of law in Idaho) that all 11<sup>th</sup> grade students must take one of the four college entrance or placement exams (SAT, ACT, ACCUPLACER, or COMPASS) beginning with the graduating class of 2013. In 2011, Idaho signed a contract with the College Board to provide the SAT or ACCUPLACER to all 11<sup>th</sup> grade students at no cost to them.

Students who would receive a non-reportable score due to the accommodations required by their Individualized Education Plan (IEP) are exempt from this rule. However, given that there are a variety of options; counselors are being trained in the best way to include all students without violating an IEP. In April 2012, Idaho will administer the first round of SAT and ACCUPLACER exams. Additionally, Idaho passed legislation during the 2011 legislative session wherein the State will pay for dual credit enrollment up to 36 credits for any student who has completed all State graduation requirements prior to their senior year. Dual credit enrollment has been a focus of Idaho for several years. ISBE-The State Board has set a goal for Idaho students to complete 180,000 dual credits per year. This legislation also provided the funding required to increasing the numbers by giving students greater access to dual credit opportunities. Idaho has provided a number of opportunities, but fundamentally believes that the same foundational skills in mathematics and English language arts are needed for postsecondary and career success.

Within this metric, there are three categories: ~~each given equal weight~~ 50% of the weight for graduation rate and 25% each for College Entrance and Placement Exams and Advanced Opportunities. The first, graduation rate, will be calculated using the NCES formula that is currently used by Idaho and described in the State’s approved NCLB accountability workbook. See the formula below.

$$G = c_{st}^{long} = \frac{g_{st}}{g_{st} + d_{st}^{12} + d_{s(t-1)}^{11} + d_{s(t-2)}^{10} + d_{s(t-3)}^9}$$

Where

- G = graduation rate.
- $c_{st}^{long}$  = four-year completion rate for state  $s$  at year  $t$ .
- $g_{st}$  = number of high school completers at year  $t$ .
- $d_{st}^{12}$  = number of grade 12 dropouts at year  $t$ .
- $d_{s(t-1)}^{11}$  = number of grade 11 dropouts at year  $t-1$ .
- $d_{s(t-2)}^{10}$  = number of grade 10 dropouts at year  $t-2$ .
- $d_{s(t-3)}^9$  = number of grade 9 dropouts at year  $t-3$ .



Idaho's graduation rate goal is 90%. As per the agreement with [the U.S. Department of Education](#) ~~ED~~ to implement the cohort-based graduation rate in 2013-14, Idaho will switch to the cohort-based graduation rate and reset the graduation rate goal at that time. The point distribution for graduation rates is as follows:

**Table 10**  
**Graduation Rate Eligible Points**

Graduation Rates	Points Eligible
90% - 100%	<del>5</del> <u>10</u>
81% -89%	<del>4</del> <u>8</u>
71% - 80%	<del>3</del> <u>6</u>
61% - 70%	<del>2</del> <u>4</u>
≤ 60%	<del>1</del> <u>2</u>

The second category is College Entrance and Placement Exams. In addition to the reading and mathematics Idaho Standards Achievement Tests (ISAT) and Idaho Standards Achievement Tests-Alternate (ISAT-Alt), Idaho will also include in the metric results from the SAT, ACT, ACCUPLACER, and COMPASS. The ~~Idaho State Board of Education~~ passed Idaho Administrative Code requiring all students, beginning with the graduating class of 2012-13, to take one of the four listed college entrance/placement exams by the end of their junior year (IDAPA 08.02.03.105.03).

Idaho ~~will~~ established a benchmark score for each eligible College Entrance and Placement Exam that research has shown has the highest probability that the student will be successful in entry-level courses, not need remediation for each exam and the metric will give points for the percentage of students that reach these set benchmarks. For example, the College Board has established that a composite score of 1550 on the SAT indicates an increased probability of success (defined as a freshman average grade of B- or higher) in college. ~~This benchmark will be evaluated to determine the score where students are best prepared for college and professional technical courses.~~ During the summer of 2012, the colleges and universities in Idaho ~~will~~ convened to agree upon a set cut score for the ACCUPLACER. That score will be used for this measure. The benchmarks for the ACT and COMPASS ~~will were either be set at the national benchmarks determined by ACT research, by the same process and. All four of these benchmarks and subscore benchmarks were~~ adopted by the State Board of Education in June 2012. In addition, based upon the current performance of this higher, more rigorous criteria, the State Board of Education also adopted a three-year point matrix for increased percentage of students achieving these benchmarks.

Table 11 illustrates those benchmarks, or be set by the Idaho State Board of Education based on past placement requirements of the state colleges and universities. From an initial preview of the 2012 SAT data, about 25% of the students meet the benchmarks in one of two ways: 1) hitting



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the target for each of the subcategories (500); or 2) receiving a 1550 on the composite. In 2011, 26% of the approximately 10,500 self-selected students who took the ACT hit all four subscores. Therefore, on the Star Rating point matrix in the first year, all 5 points possible will be awarded to schools that have 25% of their students hit the subscore or the composite benchmark for any of the four eligible tests: ACT, SAT, ACCUPLACER or COMPASS. The points awarded scale down from there and are included in Table 11 Error! Reference source not found.Error! Reference source not found.. Over the next three years, the percentage of students meeting this benchmark will increase by 10%.

**Table 11  
Accuplacer Placement Test Cut Scores**

ACCUPLACER PLACEMENT TEST CUT SCORES								
ACCUPLACER	Arithmetic		Elementary Algebra		Reading Comprehension		WritePlacer	
	Cut	Scale	Cut	Scale	Cut	Scale	Cut	Scale
<b>ESEA Waiver Recommended Benchmarks</b>	116	1-120	112	1-120	88	1-120	4	1-8
<b>Idaho Institution Standard Setting Cut Scores</b>	116	1-120	112	1-120	88	1-120	4	1-8



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**Table 12**  
**College Entrance/Placement Exit Exam Eligible Points**

Error! Reference source not found.	
<b>Year 1 - School Year 2012-2013</b>	
<b>Percent of Students Meeting College Entrance or Placement Benchmark*</b>	<b>Points Eligible</b>
25% - 100%	5
20% - 24%	4
15% - 19%	3
10% - 14%	2
< 10%	1

<b><u>Year 2 - School Year 2013-2014</u></b>	
<b><u>Percent of Students Meeting College Entrance or Placement Benchmark*</u></b>	<b><u>Points Eligible</u></b>
<u>35% - 100%</u>	<u>5</u>
<u>30% - 34%</u>	<u>4</u>
<u>25% - 29%</u>	<u>3</u>
<u>20% - 24%</u>	<u>2</u>
<u>&lt;20%</u>	<u>1</u>

<b><u>Year 3 - School Year 2014-2015</u></b>	
<b><u>Percent of Students Meeting College Entrance or Placement Benchmark*</u></b>	<b><u>Points Eligible</u></b>
<u>45% - 100%</u>	<u>5</u>
<u>40% - 45%</u>	<u>4</u>
<u>35% - 39%</u>	<u>3</u>
<u>30% - 34%</u>	<u>2</u>
<u>&lt; 30%</u>	<u>1</u>



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\* Meeting College Entrance or Placement benchmark can be met in two ways. It can be calculated as the percentage of students: 1) meeting the overall composite score, or 2) meeting all subscore benchmarks.

The third metric is Advanced Opportunities which includes both the percent of students who completed and the percent who earn a grade of C or better on an Advanced Placement (AP), International Baccalaureate (IB), ~~or~~ dual credit, or tech prep course. Eligible students in this category are all public school juniors and seniors. The first measure considers the total number of students eligible for such courses (as defined in IDAPA 08.02.03. 106.02) to be all juniors and seniors and the percent of the eligible students who took one or more courses. The second measure is a cumulative percentage of the number of courses taken by any eligible students who completed a course. If a student takes multiple courses, the higher of the two course grades will be calculated into the matrix.

**Table 13**  
**Advanced Opportunities Eligible Points**

Advanced Opportunity Eligible Points	Percent Completing an Advanced Opportunity Course with C or better				
<i>Percent Completing Advanced Opportunity</i>	90%-100%	75%-89%	60%-74%	40%-59%	≤ 39%
50% - 100%	5	5	3	2	1
25% - <del>50</del> 49%	5	4	3	2	1
16% - 24%	4	4	3	2	1
6% - 15%	3	2	2	1	1
≤ 5%	1	1	1	1	1



**Table 14  
Overall Points for Postsecondary  
and Career Readiness Measures**

Postsecondary and Career Readiness	Points Earned	Points Eligible	Total %
Graduation Rate <u>(50%)</u>		<u>510</u>	
College Entrance/Placement Exams <u>(25%)</u>		5	
Advanced Opportunities <u>(25%)</u>		5	
Total		<u>1520</u>	
Percentage of Points <u>on Weighted Total</u>	Total/ <u>1520</u> =X%		
Total Points Awarded	X * 30 (Schools with Grade 12) N/A (All other Schools)		

The percentage of points awarded will be scaled for the total points for schools with a grade 12 to the appropriate weighting. For example, a high school that receives 8 points for graduation rate, 4 points for College Entrance/Placement Exams and 4 points for Advanced Opportunities with have earned weighted points of 8, 4 and 4, respectively for a total of 16/20 points. Based on the 13/1516/20 points, the school will have received 86.780% of the points and will be given 26 24 of the 30 total points for this metric. Schools with no grade 12 will not be rated on this metric. The distribution of the points for schools without grade 12 is more heavily weighted in the first three metrics.

## **PARTICIPATION**

All schools and districts must have at least a 95% participation rate in the State assessments for all of their students, including all subgroups, or the star rating for the school or district will be dropped to a maximum of a Three--Star rating or by one star. For example, if a school is rated a Five--Star School, but does not meet the 95% participation rate for any overall or subgroup, the school will be dropped to a Three--Star Rating.

Idaho will continue to employ the following participation rules as included in the current Accountability Workbook:

“The ninety-five percent (95%) determination is made by dividing the number of students assessed on the spring ISAT by the number of students reported on the class roster file uploaded into the Idaho System for Education Excellence (ISEE), the K-12 longitudinal data system.

1) If a school district does not meet the ninety-five percent (95%) participation target for the current year, the participation rate will be calculated by a three (3) year average of participation.  
2) Students who are absent for the entire state-approved testing window because of a significant medical emergency are exempt from taking the ISAT if such circumstances prohibit them from participating. For groups of ten (10) or more students, absences for the state assessment may not



exceed five percent (5%) of the current enrollment or two (2) students, whichever is greater. Groups of less than ten (10) students will not have a participation determination.”

- In 2004, Idaho added to Board Rule the provision to use an average of the most recent three years to determine whether an LEA meets or exceeds the 95% requirement. IDAPA 08.02.03, Rules Governing Thoroughness, in section 03(b)1 states: “If a school district does not meet the ninety-five percent (95%) participation target for the current year, the participation rate can be calculated by the most recent two (2) year or the most recent (3) year average of participation.”

## STAR RATING

All the above measures are rolled into a cumulative measure that results in a star rating of one to five.

Table 15 illustrates how the star rating system is operationalized with all four of the measures.

The star rating system follows the total number of points. Districts default to the schools with Grade 12 metric unless the district does not include Grade 12.

**Table 15**  
**Star Rating Point Range**

Star Rating	Total Point Range
*****	83-100
****	67-82
***	54-66
**	40-53
*	≤39



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**Table 16**  
**Example Overall Rating Chart for A-a School with Grade 12**

Accountability Measures	Points Achieved	Points Eligible	Star Rating
Achievement	10	20	
Growth to Achievement	20	30	
Growth to Achievement Gaps	10	20	
Postsecondary and Career Readiness	25	30	
<b>TOTAL</b>	65	100	***
Participation Rates	Were at least 95% of students tested?	Yes	***
<b>STAR RATING</b>	Three Star		

**Table 17**  
**Example Overall Rating Chart for A-a School without Grade 12**

Accountability Measures	Points Achieved	Points Eligible	Star Rating
Achievement	20	25	
Growth to Achievement	40	50	
Growth to Achievement Gaps	20	25	
<b>TOTAL</b>	80	100	****
Participation Rates	Were at least 95% of students tested?	No, star rating drops 1	***
<b>STAR RATING</b>	Three Star		

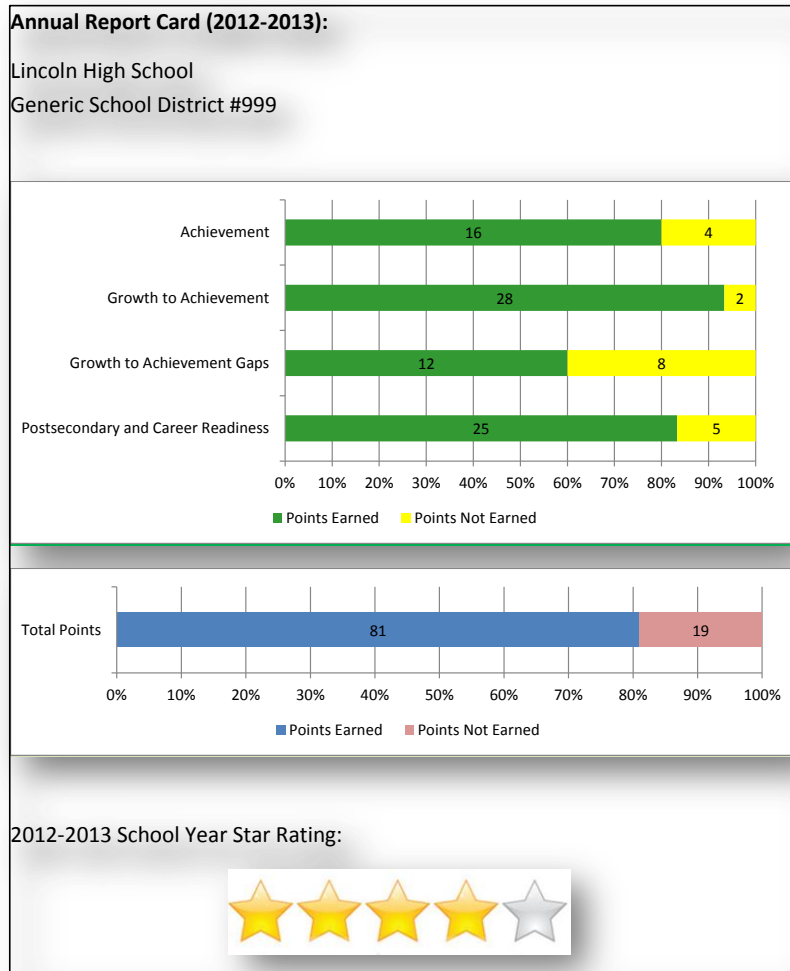


#### ACCOUNTABILITY REPORT CARD

The State has historically made accountability results known at the school and district level on its website in the form of a Report Card house at <http://devapps.sde.idaho.gov/reportcard>. ISDE will continue this practice. The report card has included tabs that highlight Adequate Yearly Progress (AYP), general assessment results, teacher quality, and graduation rates. The Report Card will maintain this basic structure. However, the AYP tab will be replaced for each school and district with a report that displays the following data elements and information as shown in Table 18.



**Table 18**  
**Example School Report Card**



The use of this Report Card format will facilitate broader stakeholder understanding of the data metrics behind the school's overall Star Rating. Stakeholders will be able to explore the data more deeply by visiting the other tabs that detail the underlying data, such as assessment results broken out by grade level.



## PART II: REWARDS AND SANCTIONS

The primary elements of Idaho's differentiated system of recognition, accountability, and support are:

1. Differentiated levels of rewards, sanctions, and consequences;
2. The WISE Tool Improvement Planning process;
3. Diagnostic reviews to assess local capacity, and
4. A Statewide System of Support that utilizes tiered levels of intensity and state intervention.

This section first provides a table for an overview of the rewards and sanctions at both the district and school level.

Table 19 and Table 20 explains each of the elements of the system (Recognition and Rewards, WISE Tool planning, Statewide System of Support, ~~School Choice~~ Family and Student Support Options, Supplemental Tutoring Services, Professional Development Set Aside, and State Funding Alignment).

The ESEA website is a central location for Idaho's ESEA Waiver resource information. The site is open to the public and houses links for: ESEA Waiver updates, quick guides, presentations, and contact resources. (<http://www.sde.idaho.gov/site/esea/>).

The ESEA Prezi Presentation offers a detailed explanation of what Idaho's new accountability plan could look like, how it would work, and what the new system could potentially offer. The presentation offers an example of how two very different schools were able to achieve the same star rating through different paths. This presentation is on the ESEA website available to everyone as a PDF document.

([www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/Idaho%27s%20New%20Accountability%20Plan%20Presentation%20Prezi%20PDF.pdf](http://www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/Idaho%27s%20New%20Accountability%20Plan%20Presentation%20Prezi%20PDF.pdf))

Two quick guides were developed to help interpret the star rating system. The first, "Quick Guide for Idaho's Accountability Measures Star Rating System," was designed to help administrators, educators, and district test coordinators log on to the new star rating system and understand what they were seeing. The second guide, "Interpreting the Star Rating System," still provides an explanation of how to interpret the rating, but it leaves out the login information so that it can be given to parents.

([www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/Interpreting%20the%20Star%20Rating%20System.pdf](http://www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/Interpreting%20the%20Star%20Rating%20System.pdf))



The “Growth Percentile Flow Chart” was created to offer a visual mapping tool to explain the process of how SGP and AGP are determined. This tool offers anyone the ability to follow the process with limited knowledge and come to a basic understanding of the growth percentile calculation process.

([www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/Individual%20SGP%20and%20AGP%20Calculation%20Process%20Flow.pdf](http://www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/Individual%20SGP%20and%20AGP%20Calculation%20Process%20Flow.pdf))

The “How to Read Quick Guide for the Student Growth Report” was created to explain how to interpret the student growth reports that are posted on Schoolnet. These reports utilize the student’s ISAT extender scores to generate a detailed picture of the student’s abilities. The student can then be tracked from year to year, showing the teacher/parent areas of strength and areas of concern.

([www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/How%20to%20Read%20Student%20Growth%20Report%20-%202003%2030%2012.pdf](http://www.sde.idaho.gov/site/postLeg/2012Tour/Idaho%20Accountability%20Plan%20Presentation/How%20to%20Read%20Student%20Growth%20Report%20-%202003%2030%2012.pdf))

Idaho will create a Parent Video that will explain our Student Growth Model using media that is familiar and comfortable to the general public. Idaho will develop a video that is similar to Colorado’s Growth Model video. This video will use audio and visual content to explain to parents how SGP/AGP works and why we use it.

([www.schoolview.org/ColoradoGrowthModel2.asp](http://www.schoolview.org/ColoradoGrowthModel2.asp))

We will create a parent brochure that is similar to the ISAT Parent Brochure. It will include a step by step overview including: what is Star Rating, how to interpret the ratings, and why do we have a rating system.

([www.sde.idaho.gov/site/assessment/ISAT/docs/testAdmin/2012\\_ISAT%20Parent%20Brochure.pdf](http://www.sde.idaho.gov/site/assessment/ISAT/docs/testAdmin/2012_ISAT%20Parent%20Brochure.pdf))

The Student Growth Model wWebsite will include a section for FAQs. Its primary design is to increase the understanding of the student growth model. There will be a link to this webpage from the ESEA wWebsite.

The Interactive chart will be included on the Student Growth wWebsite. It will provide aggregate growth data for schools and districts in an interactive format.



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**Table 19  
Rewards and Sanctions Overview – District Level**

Districts	Five Star	Four Star	Three Star <sup>§</sup>	Two Star <sup>**</sup>	One Star
<b>Recognition &amp; Rewards</b>	Eligible for Recognition and Rewards	Eligible for Recognition	Not eligible	Not eligible	Not eligible
<b>WISE Tool</b>	Optional (Continuous Improvement Plan)	Optional (Continuous Improvement Plan)  <i>However, must coordinate district planning requirements with any One- or Two-Star school level plans</i>	Continuous Improvement Plan  <i>However, must coordinate district planning requirements with any One- or Two-Star school level plans</i>	Rapid Improvement Plan  <i>Also: Must coordinate district planning requirements with any One- or Two-Star school level plan</i>	Turnaround Plan  <i>Also: Must coordinate district planning requirements with any One- or Two-Star school level plans</i>
<b>Statewide System of Support Services</b>	Optional	Optional	Optional	Participation Required	Participation Required
<b>Family and Student Support Options</b> • <b>Supplemental Tutoring Services</b> • <b>School Choice</b>	Must provide for eligible students in One- or Two-Star schools	Must provide for eligible students in One- or Two-Star schools	Must provide for eligible students in One- or Two-Star schools	Must provide for eligible students in district	Must provide for eligible students in district
<b>Professional Development Set-Aside</b>	Optional <sup>***</sup>	Optional <sup>***</sup>	Optional <sup>***</sup>	Required 10% of District Title I funds	Required 10% of District Title I funds
<b>State Funding Alignment Requirements<sup>††</sup></b>	Not monitored	Not monitored	Must provide plan that describes aligned use of funds	Must provide plan that describes aligned use of funds	Must provide plan that describes aligned use of funds

<sup>§</sup>Three-, four-, and five-star categories will determine school and district recognition, rewards, and accountability requirements on an annual basis.

<sup>\*\*</sup> One- and two-star categories will determine school and district accountability requirements based on exit and entrance criteria defined in Sections 2.D.5 and 2.E.4.

<sup>††</sup> State funds include: hard-to-fill, leadership and pay for performance, dual credit, technology, professional development, remediation, and criteria used for determining ~~4-one-~~ and ~~2two-~~ year teacher contracts. Further inclusion in the plan includes a provision for focus on the teacher and administrator evaluation plans and how parental input will be included.

<sup>\*\*\*</sup> Use consistent with Title I requirements.

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**Table 20  
Rewards and Sanctions Overview – School Level**

Districts	Five Star	Four Star	Three Star <sup>§</sup>	Two Star <sup>**</sup>	One Star
<b>Recognition &amp; Rewards</b>	Eligible for Recognition and Rewards	Eligible for Recognition	Not eligible	Not eligible	Not eligible
<b>WISE Tool</b>	<u>Continuous Improvement Plan (Optional unless school misses the AMO for their At-Risk subgroup or has an achievement gap between their At-Risk subgroup and the rest of their student population greater than that obtained by the rest of Idaho's Two-Star Schools over two consecutive years) and missing AMOs Optional (Continuous Improvement Plan). Missing AMO's for any ESEA subgroup N&gt;=25, must ensure an improvement plan is put into</u>	<u>Continuous Improvement Plan (Optional unless school misses the AMO for their At-Risk subgroup or has an achievement gap between their At-Risk subgroup and the rest of their student population greater than that obtained by the rest of Idaho's Two-Star Schools over two consecutive years) and missing AMOs Optional (Continuous Improvement Plan). Missing AMO's for any ESEA subgroup N&gt;=25, must ensure an improvement plan is put into</u>	Continuous Improvement Plan	Rapid Improvement Plan	Turnaround Plan

§ Three-, four-, and five-star categories will determine school and district recognition, rewards, and accountability requirements on an annual basis.

\*\* One- and two-star categories will determine school and district accountability requirements based on exit and entrance criteria defined in Sections 2.D.5 and 2.E.4.



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	<u>place. This plan will be monitored and administered by the district.</u>	<u>place. This plan will be monitored and administered by the district.</u>			
<b>Statewide System of Support Services</b>	Optional	Optional	Optional	Participation Required	Participation Required
<b>Family and Student Support Options</b> <ul style="list-style-type: none"> <li>◆ <b>Supplemental Tutoring Services</b></li> <li>◆ <b>School Choice</b></li> </ul>	Optional	Optional	Optional	Must provide for eligible students	Must provide for eligible students
<b>Professional Development Set-Aside</b>	Optional	Optional	Optional	Required 10% of school Title I funding allocation NOTE: <i>This amount may aggregate into the <u>the district</u> 10% set-aside</i>	Required 10% of District Title I funding allocation NOTE: <i>This amount may aggregate into the <u>the district</u> 10% set-aside</i>
<b>State Funding Alignment Requirements<sup>††</sup></b>	No additional requirements	No additional requirements	Must provide plan that describes aligned use of funds	Must provide plan that describes aligned use of funds	Must provide plan that describes aligned use of funds

## RECOGNITION AND REWARDS

Idaho will replace its current reward system with **one** reward for schools that earn “Five-Star School” status under the State’s next generation accountability plan. Five-Star Schools will be determined under Idaho’s new Accountability Plan (*as described in Part I of this section*). A school must be a Five-Star School in order to be nominated for national awards such as the National Blue Ribbon Award and Distinguished School Awards.

<sup>††</sup> State funds include: hard-to-fill, leadership and pay for performance, dual credit, technology, professional development, remediation, and criteria used for determining one- and two-year teacher contracts. Further inclusion in the plan includes a provision for focus on the teacher and administrator evaluation plans and how parental input will be included.



Both Five-Star and Four-Star schools will be publicly recognized for their achievement through media releases and through ISDE's websites and social media outlets.

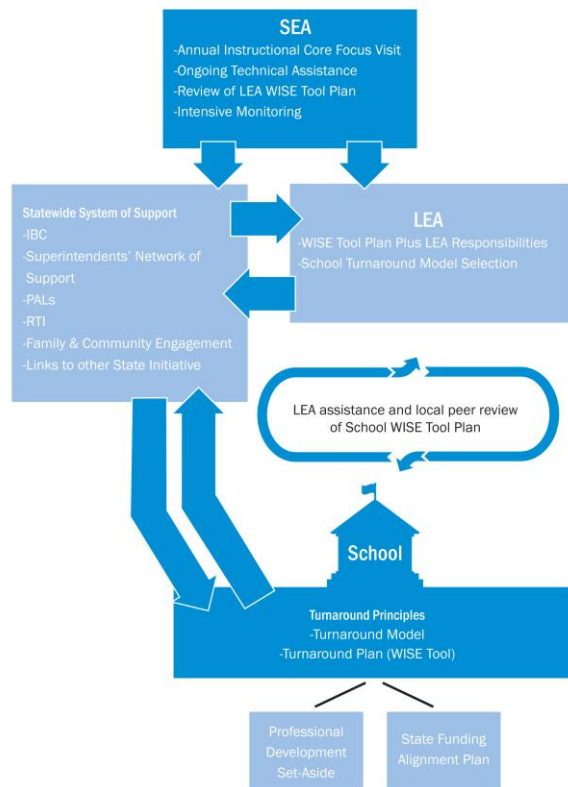
#### PRIORITY AND FOCUS SCHOOLS OVERVIEW

Idaho is placing an emphasis on the accountability and support systems necessary for One- and Two-Star Schools (Priority and Focus Schools). The tables provided above for the Rewards and Sanctions Overview designation schools in the One- and Two-Star categories based on entrance and exit criteria. The Turnaround Plan and associated requirements are the expectations for One-Star Schools (i.e., Priority Schools). The Rapid Improvement Plan and associated requirements are to be implemented in Two-Star Schools (i.e., Focus Schools). Charts 1 and 2 on the following page depict the relationship between the accountability requirements and support mechanisms available to One- and Two-Star Schools<sup>14</sup>.

<sup>14</sup> All schools designated as priority schools in Table 2 are priority schools for purposes of this request and must implement the interventions required of One-Star schools, regardless of their star rating. Across this request, all references to and requirements of One-Star schools apply to all schools designated as priority schools in Table 2 as well. All schools designated as focus schools in Table 2 are focus schools for purposes of this request and must implement the interventions required of Two-Star schools, regardless of their star rating. Across this request, all references to and requirements of Two-Star schools apply to all schools designated as priority schools in Table 2 as well.

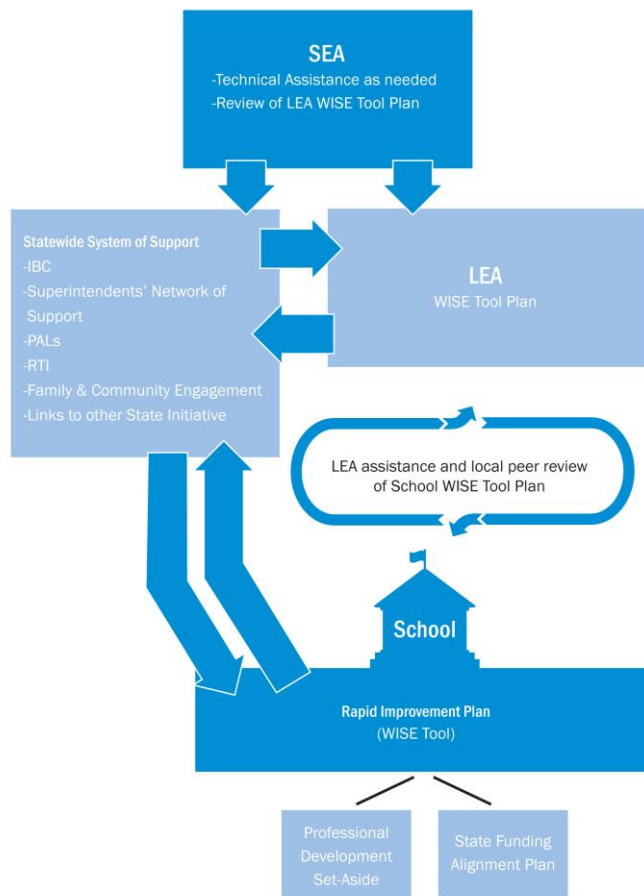


**Chart 1**  
**Relationship of Accountability and System of Support for One-Star Schools**





**Chart 2**  
**Relationship of Accountability and System of Support for Two-Star Schools**





## WISE TOOL

In 2009, the national Center on Innovation and Improvement's (CII – a center funded by the U.S. Department of Education to provide schools and districts with the information and skills they need to make wise decisions on behalf of students) asked Idaho to participate in the first cohort of the Academy of Pacesetter States. Participation in the CII Academy of Pacesetter States and the use of its tools has also served to significantly shape the evolution of the State's model for differentiated support. The WISE Tool, an online strategic planning process, is Idaho's version of the CII Indistar online strategic planning tool.

Idaho has divided responsibility for compliance into two areas: (a) applications for basic funding and assurances of compliance to ESEA and State requirements; and (b) planning tools for system improvement. Anything related to the former goes into our Consolidated Federal and State Grant Application (CFSGA). Anything related to the latter goes into the WISE Tool. What does not fit into the actual format of the WISE Tool, but which fits the intent of improvement planning, gets embedded within a dashboard that CII makes available when logging into the WISE Tool. CII customizes the dashboard for our State, which makes our State able to adapt quickly to new directions.

There are three levels of planning that Idaho makes available to schools and districts through the accountability and support system. The levels are differentiated to best meet the needs of the students in that school or district. The least intensive level is the Continuous Improvement Plan, which Three-Star Schools will utilize. The moderate level is the Rapid Improvement Plan, which Two-Star Schools will utilize. The most intensive level is the Turnaround Plan, which One-Star Schools will utilize. The planning requirements for each level are outlined in ISDE's *District and School Improvement Planning & Implementation Workbook* (Full document is available online at <http://www.sde.idaho.gov/site/schoolImprovement/>)

### Continuous Improvement Plan

- **Schools** -- The Continuous Improvement Plan provides the full set of indicators available through the WISE Tool. There are over more than 200 indicators in the school level tool. Because schools in this level have a basic level of capacity and performance that is approaching State expectations, providing the larger set of indicators allows schools to customize and fine tune their planning without as much prescription from the State.
- **Districts** -- The district level Continuous Improvement Plan is also designed by CII and fits within the same online planning model. It is made up of a smaller set of indicators that relate to district context or governance; leadership; and curriculum, instruction, and assessment. Districts in this planning category are allowed significant flexibility in the choice of indicators used for planning.

### Rapid Improvement Plan

- **Schools** -- The Rapid Improvement Plan is made up of a sub-set of approximately 90 indicators within the WISE Tool. These indicators are those which have been identified by CII as the highest impact indicators in order to achieve rapid improvement.



- ISDE has rank-ordered these as to the most important for schools in the Focus category as defined in the ESEA Flexibility guidelines. Because these schools demonstrate the largest within school achievement gaps, the State's theory of action is that the school system is not as healthy as it should be, and that by addressing these high-impact indicators, the school will get the most immediate return on investment.

ISDE requires schools to plan for these indicators in stages; not all of them are required in any given year. This is to promote freedom of choice (i.e., self-selection of where to start) and buy-in at the local level. It is also to facilitate true planning, rather than a compliance mindset. However, the State does review the plans and expects the plan to reflect feedback provided to the school and the district through the Instructional Core Focus Visit<sup>15</sup>, if applicable. During a Focus Visit, a group of experts from the ISDE evaluates instructional programs and the leadership and governance structure at a school and district. (See Section 2.E.iii for more detail on Focus Visits.) The State review and the use of the Focus Visit will ensure that the plan addresses any subgroups ~~who~~that are underperforming. In balancing a degree of freedom for affected schools with a degree of prescription, ISDE aims to cultivate leadership capacity so that reform is sustained in the long term.

- **Districts** -- The district level Rapid Improvement Plan consists of the same indicators as those within the continuous improvement model. Districts in this planning category are allowed still allowed flexibility in the choice of indicators used for planning, but are required to address a few specific indicators deemed critical to rapid improvement.

#### Turnaround Plan

- **Schools** -- The Turnaround Plan is a hybrid of the Rapid Improvement Plan described above and the Transformation Toolkit provided by CII. The Transformation Toolkit is a companion planning process within Indistar. The indicators were designed by CII specifically as part of the changes in the School Improvement Grants (SIG) under ESEA 1003g that occurred in FY 2009. These indicators have a comprehensive focus on the strands of the turnaround principles (e.g., teachers and leaders, governance, instructional and support strategies, and learning time).

Idaho has taken a scaffolded approach to the use of the Transformation Toolkit.

For schools with greater capacity, the Turnaround Plan is a combination of all the requirements for the Rapid Improvement Plan and specific portions that are extracted from the Transformation Toolkit. For contexts in which the need is more severe, the State directs the school to have a plan that solely uses the breadth and depth of the Transformation Toolkit. Districts with schools in the One-Star category are required to support the Turnaround Plan with a specific set of indicators that describe how they will oversee the transformation of the school.

<sup>15</sup> An Instructional Core Visit is an intensive evaluation of a school and district including observations of 100% of the classes, interviews with at least 60% of the staff, and interviews with parents and community members. The data are gathered against 49 indicators indicative of where the more intensive need and focus should be for the Turnaround Plan.



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For example, districts have to identify what types of governance and staffing changes will occur prior to the school completing its level of planning.

- **Districts** -- The district level Turnaround Plan is made up of the same indicators as those within the continuous improvement model. Districts in this planning category are allowed little flexibility in the choice of indicators used for planning, and are required to address a few specific indicators deemed critical to rapid improvement. Planning at this level requires local Board of Trustee action and must address specific leadership actions similar to school level Turnaround Principles.

Summary of Planning Requirements: The appropriate improvement plan will be matched to each school's performance based on the Star Rating that applies to the current year as well as indications regarding how the school is progressing over time. The following table indicates how progress intersects with Star Ratings to determine which WISE Tool plan is required.

**Table 21**  
**WISE Tool Plan Requirements Based on Star Rating and Progress**

<u>Current Star Rating</u>	<u>Progress</u>	
	<u>No Lack of Progress Demonstrated</u>	<u>Lack of Progress Demonstrated</u>
<b>5</b> <b>(Five Stars)</b>	<u>No Planning Requirements</u>  <u>Improvement Plan</u> <ul style="list-style-type: none"> <li>• <u>Missing AMOs for any ESEA subgroup N<math>\geq</math>25, must ensure an improvement plan is put into place. This plan will be monitored and administered by the district.</u></li> </ul>	<u>Continuous Improvement Plan</u> <ul style="list-style-type: none"> <li>• <u>Required in the year following the <del>third</del>second consecutive year in which the school exhibits an overall subgroup achievement gap.</u></li> </ul> <u>Improvement Plan</u> <ul style="list-style-type: none"> <li>• <u>Missing AMO's for any ESEA subgroup N<math>\geq</math>25, must ensure an improvement plan is put into place. This plan will be monitored and administered by the district.</u></li> </ul>
<b>4</b> <b>(Four Stars)</b>	<u>No Planning Requirements</u>  <u>Improvement Plan</u> <ul style="list-style-type: none"> <li>• <u>Missing AMOs for any ESEA subgroup N<math>\geq</math>25, must ensure an improvement plan is put into place. This plan will be monitored and administered by the district.</u></li> </ul>	<u>Continuous Improvement Plan</u> <ul style="list-style-type: none"> <li>• <u>Required in the year following the <del>third</del>second consecutive year in which the school exhibits an overall subgroup achievement gap.</u></li> </ul> <u>Improvement Plan</u> <ul style="list-style-type: none"> <li>• <u>Missing AMO's for any ESEA subgroup N<math>\geq</math>25, must ensure an improvement plan is put into place. This plan will be monitored and administered by the district.</u></li> </ul>



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	Progress	
	No Lack of Progress Demonstrated	Lack of Progress Demonstrated
Current Star Rating		
<u><b>3</b></u> <u><b>(Three Stars)</b></u>	<u>Continuous Improvement Plan</u> <ul style="list-style-type: none"> <li>Required first year in which rating was attained</li> </ul>	<u>Continuous Improvement Plan</u> <ul style="list-style-type: none"> <li>Required each year in which rating is attained</li> </ul>
<u><b>2</b></u> <u><b>(Two Stars)</b></u>	<u>Continuous Improvement Plan</u> <ul style="list-style-type: none"> <li>Required first year in which rating was attained, if the previous year was not at One or Two Stars.</li> </ul> <u>Rapid Improvement Plan</u> <ul style="list-style-type: none"> <li>All schools identified as Focus Schools in Table 2 based off of data from the 2011-2012 school year are <del>priority</del> Focus Schools for the purposes of this waiver request and must implement the Rapid Improvement Plan starting in the 2012-2013 school year regardless of their Star Rating.</li> </ul>	<u>Rapid Improvement Plan</u> <ul style="list-style-type: none"> <li>Required over the course of three years, beginning with the second year in which a school scored Two Stars or less consecutively (i.e., one of the years had to be at Two Stars, the other year must be either One or Two Stars).</li> </ul> <u>Rapid Improvement Plan</u> <ul style="list-style-type: none"> <li>All schools identified as Focus Schools in Table 2 based off of data from the 2011-2012 school year are <del>priority</del> Focus Schools for the purposes of this waiver request and must implement the Rapid Improvement Plan starting in the 2012-2013 school year regardless of their Star Rating.</li> </ul>
<u><b>1</b></u> <u><b>(One Star)</b></u>	<u>Continuous Improvement Plan</u> <ul style="list-style-type: none"> <li>Required first year in which rating was attained, if the previous year was not at One Star.</li> </ul> <u>Turnaround Plan</u> <ul style="list-style-type: none"> <li>All schools identified as Priority Schools in Table 2 based off of data from the 2011-2012 school year are <del>Focus</del> Priority Schools for the purpose of this waiver request and must create their Turnaround Plan starting in the 2012-2013 school year regardless of their Star Rating.</li> </ul>	<u>Turnaround Plan</u> <ul style="list-style-type: none"> <li>Required over the course of three years, beginning with the second consecutive year in which a school scored One Star.</li> </ul> <u>Turnaround Plan</u> <ul style="list-style-type: none"> <li>All schools identified as Priority Schools in Table 2 based off of data from the 2011-2012 school year are <del>Focus</del> Priority Schools for the purpose of this waiver request and must create their Turnaround Plan starting in the 2012-2013 school year regardless of their Star Rating.</li> </ul>



*Transition Period:* The State is holding AYP targets for use during the 2012-2013 school year while introducing the new performance framework. ~~The Schools will continue to be identified in the same way they were under existing NCLB improvement timeline will continue to be in place~~ until spring 2013. However, an initial Star Rating will be available to schools and districts by fall 2012. Therefore, there will be a transition period in which schools have labels under two systems. In order to provide clarity of the requirements for 2012-2013, ~~the following table:~~ Table 22 details how the requirements of the two systems will integrate for a one-year period. The table explains what each level of NCLB School Improvement Status is required to do depending on the star rating earned at the end of 2011-2012. The requirements balance the new and old systems to alleviate burden where possible and maintain strong accountability where performance is low.



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**Table 22  
Transitional Period School Improvement Requirements**

<b>NCLB Status 2012-2013</b>	<b>Star Rating for 2012-2013</b>			
	<i>Five or Four Stars</i>	<i>Three Star</i>	<i>Two Star<sup>16</sup></i>	<i>One Star<sup>17</sup></i>
<b>School Improvement (SI) Year 1</b>	No plan required No additional requirements	Continuous Improvement Plan	Continuous Improvement Plan Professional Development (Set Aside)	Continuous Improvement Plan Professional Development (Set Aside)
<b>SI Year 2</b>	No plan required No additional requirements	Continuous Improvement Plan	Continuous Improvement Plan Professional Development (Set-Aside)	Continuous Improvement Plan Professional Development (Set-Aside)
<b>Corrective Action (SI Year 3)</b>	No plan required No additional requirements	Continuous Improvement Plan State Funding Alignment Plan	Continuous Improvement Plan A Corrective Action State Funding Alignment Plan Professional Development (Set-Aside)	Continuous Improvement Plan A Corrective Action State Funding Alignment Plan Professional Development (Set-Aside)
<b>Restructuring Year 1: Planning (SI Year 4)</b>	No plan required No additional requirements	Continuous Improvement Plan State Funding Alignment Plan	NCLB Restructuring Plan State Funding Alignment Plan Professional Development (Set-Aside)	NCLB Restructuring Plan State Funding Alignment Plan Professional Development (Set-Aside)
<b>Restructuring Year 2 (or beyond): Plan Implementation (SI Year 5+)</b>	No plan required No additional requirements	Continuous Improvement Plan State Funding Alignment Plan	NCLB Restructuring Plan Implementation State Funding Alignment Plan Professional Development (Set-Aside)	NCLB Restructuring Plan Implementation State Funding Alignment Plan Professional Development (Set-Aside)

<sup>16</sup> Those schools identified as Focus Schools on Table 2 must implement the Rapid Improvement Plan timeline in Table 37.

<sup>17</sup> Those schools identified as Priority Schools on Table 2 must implement the Turnaround Principles timeline in Table 33.



## STATEWIDE SYSTEM OF SUPPORT

The Statewide System of Support (SSOS) team problem solves to find solutions to local contexts and pulls from a variety of programs and strategies to build the capacity of leaders for sustainable improvement.

The Statewide System of Support team oversees the implementation of the following services directly:

- ✓ Idaho Building Capacity Project
- ✓ Principals Academy of Leadership
- ✓ Superintendents Network of Support
- ✓ Response to Intervention
- ✓ Family and Community Engagement
- ✓ Instructional Core Focus Visits
- ✓ WISE Tool Improvement Planning Supports – Local Peer Review

**Idaho Building Capacity Project --** The Idaho Building Capacity (IBC) Project, began in 2008, is a cornerstone of Idaho's Statewide System of Support for Idaho schools and districts that are in need of substantial improvement. Cultivation of leadership in rural and remote areas within Idaho is a key focus. ~~The State partners with~~ In partnership with Boise State University, Idaho State University, and University of Idaho to serve. ~~This amounts to over more than~~ 10 percent of all schools ~~in the state~~, more than over 30 percent of schools in improvement status, and ~~over more than~~ 30 percent of the districts in the Sstate. ISDE has delivered this assistance to ~~over more than~~ 60 schools in more than 40 districts each year throughout every region of the State. Under the Idaho Accountability Plan, this project has the capacity to serve more than just the lowest performing 15 percent, but will target and prioritize One- and Two-Star schools.

The IBC project hires highly distinguished educators trained by the State to assist school and district leaders. Capacity Builders (CBs) are assigned to all participating schools and districts within the IBC network. CBs coach leaders and leadership teams through the tasks of improvement with monthly training and assist in promoting alignment among the various parts within the school or district system. Capacity Builders are provided with a tool-kit of school improvement resources, and, in partnership with school and district leaders, help create and implement a customized school improvement plan.

**Principals Academy of Leadership --** The Idaho Principals Academy of Leadership (PALs) project was developed by ISDE to support the work of building level administration in improving outcomes for all students by focusing on the quality of instruction. PALs is a professional learning community structured for building level administration to provide a learning environment focused on increasing the effectiveness to the Instructional Core. Principals participate in a balance of content, professional conversation, and collegial instructional rounds related directly to instructional leadership, managing change, and improving the overall effectiveness of the Instructional Core.



Strands of study include activities such as:

- Evaluating Leadership Frameworks and Turnaround Leadership Competencies.
- Supporting Instructional Rounds and Classroom Observations.
- Implementing personal professional growth plans based on self-evaluations.
- Networking with collegial conversation, collaboration and relationship building.

PALs serves as a resource for principals in Turnaround Plan schools in order to support and build their capacity in specific aspects of leadership. Whereas participation in IBC requires a three-year commitment to developing the leader and leadership team capacity for improvement in a school related to the specific context of the school's needs, PALs provides training unique to the principal regarding higher level perspectives on leadership.

**Superintendents Network of Support** -- The Idaho Superintendents Network of Support project was developed by the ISDE in partnership with Boise State University's Center for School Improvement and Policy Studies. The purpose of this project is to support the work of district leaders in improving outcomes for all students by focusing on the quality of instruction.

The network is comprised of committed superintendents who work together to develop a cohesive and dedicated leadership community focused on teaching and learning. They support each other as they bring about change and collectively brainstorm obstacles that may prevent improvement in the quality of the instruction in their districts. ~~The Department~~ISDE acts as a resource and provides the necessary research, experts, and planning to bring superintendents from across the State together to discuss self-identified issues.

Topics for discussion include:

- Improved Outcomes for Students
- Working with Stakeholders
- Transforming District Central Offices for Learning Improvements
- Creating and Supporting District and Building Level Leaders
- Analyzing Teaching and Learning through Data
- Balancing Political Forces
- Value, Ethics and Beliefs: Moral Purpose of Leadership

The Superintendents Network of Support also serves as a resource for superintendents in districts with schools that are in the One-, Two-, and Three-Star status in order to support and build their capacity in specific aspects of leadership.

**Response to Intervention** -- Response to Intervention (RTI) is a framework originally advocated by the National Association of State Directors of Special Education. RTI is a systemic approach that schools can use to better meet the needs of all learners, but it is also well suited for students with disabilities who have a Specific Learning Disability (SLD).



Idaho has intentionally increased use of RTI as a framework for continuous school improvement. RTI integrates assessment, intervention, and curriculum planning responsive to student data within a multi-level prevention system in order to maximize achievement for all students. With RTI, schools use data to identify students at risk for poor learning outcomes, monitor students' learning progress, provide evidence-based interventions depending on a student's responsiveness, and identify students with learning or other disabilities, as defined by State law. Additionally, schools use the data gained to determine the effectiveness of intervention and core program instructional practices. Therefore, the feedback loop is able to be completed at all levels within a school: individual students, small intervention groups, whole class performance, whole grade level performance, and whole school performance.

In addition to the historical development of RTI, in the past three years Idaho has partnered with the National Center on Response to Intervention (NCRTI) to fine-tune and scale up implementation of RTI practices as part of our Statewide System of Support.

NCRTI has helped the State to further refine its working definition of RTI in a way that can apply to all schools and districts and within all subject areas, as opposed to just with the early implementation in the area of elementary literacy. Work with NCRTI has also helped the State explicitly tie the essential components of RTI into its larger school improvement model tools and framework: the WISE Tool and the Nine Characteristics of High Performing Schools. The four essential components of RTI match up with general school improvement and aspects of the ESEA Turnaround Principles very well:

- A school-wide, multi-tiered instructional and behavioral system for preventing student failure.
- Screening.
- Progress Monitoring.
- Data-based decision-making for instruction, movement within the multi-tiered prevention system, and identification of disabilities in accordance with State law.

The essential components of RTI and the Statewide System of Support components are tightly connected within Idaho's system (More on Idaho's RTI process is online at <http://www.sde.idaho.gov/site/rti/>.)

**Family and Community Engagement** -- ISDE has built a system to engage parents within the improvement process as well. The Family and Community Engagement Coordinator identifies, plans, and implements methods that would support district leaders and their schools in engaging families and the community at large in the discussion of continuous school improvement.

Idaho has partnered with the Academic Development Institute (ADI), the parent organization for the Center on Innovation and Improvement (CII), to provide the Family Engagement Tool (FET) as a resource to all Idaho schools. The FET guides school leaders through an assessment of indicators related to family engagement policies and practices.



The resulting outcome is a set of recommendations that can be embedded in the school's improvement plan.

As described on the FET website ([www.families-schools.org/FETindex.htm](http://www.families-schools.org/FETindex.htm)), the tool provides:

- A structured process for school teams working to strengthen family engagement through the school improvement plan.
- Purposeful family engagement that is linked to student learning.
- Rubrics for improving district and school family engagement policies, the home-school compact, and other policies connected to family engagement.
- Documentation of the school's work for the district and State.
- A reservoir of family engagement resource for use by the school.

The FET is a supplemental tool that is closely aligned with the WISE Tool indicators and planning components related to engaging families and communities in academic improvement across the system. The Statewide System of Support team coordinates services among and between the various programs, such as the Idaho Building Capacity Project and others, in order to assist leaders in knowing how to engage families and their communities at large in the work of school improvement.

**Instructional Core Focus Visit** -- To determine existing capacity, the State uses the Focus Visit process, a modification of CII's *Patterns of Practice Guide*. Focus Visits use 49 indicators from the WISE Tool and collect evidence of practices associated with substantial school improvement. Data are collected by an external team of reviewers with expertise in the characteristics of effective schools. The external team observes 100 percent of the teachers, including teachers of special populations. Observational data are collected for a sub-set of the indicators that coincide with our statewide teacher evaluation. A protocol linked to the indicators is also used to interview individuals (at least 60 percent of the certified teaching staff and all administrators) and identify recurring themes. Focus groups are conducted in each school for parents, students, non-certified staff (e.g., cooks, custodians, paraprofessionals), and teachers. All data are then analyzed and triangulated to describe the practices of the system. Resulting recommendations are made to district leadership regarding appropriate next steps, especially in the area of leadership capacity and the turnaround principles. Focus Visits recur once a year for three years to maintain a balance of positive support and pressure and to help determine further state supports and/or interventions. Since the protocol is linked to the WISE Tool, recommendations directly tie back to school and district improvement plans and processes, which enhance ongoing assistance efforts. Recommendations will also include connections to programs, technical assistance, and training opportunities that match the needs of the school or district. Table 23 illustrates some examples of opportunities the state can recommend under four key areas of the system.



**Table 23**  
**Sample Support, Technical Assistance, and Training Opportunities**

<i>Teachers and Leaders</i>
<ul style="list-style-type: none"><li>• State training for teacher and administrator evaluation.</li><li>• Enroll in the Principals Academy of Leadership.</li><li>• Enroll in the Superintendents Network of Support.</li><li>• Enroll in the Idaho Building Capacity Project.</li><li>• Technical assistance on the alignment of pay-for-performance and other <u>S</u>state funds with turnaround principles.</li></ul>
<i>Instructional and Support Strategies</i>
<ul style="list-style-type: none"><li>• Enroll school leadership in RTI training opportunities.</li><li>• Provide a Mathematical Thinking for Instruction (MTI) course to the school to align it with the Idaho Math Initiative and/or follow up visits from Regional Mathematics Specialists.</li><li>• Training on the Common Core State Standards and technical assistance with how to align curriculum, instruction, and assessment practices.</li><li>• Training in the <u>S</u>state's instructional management system as a support for data utilization and curricular planning.</li><li>• Technical assistance with ELL program design, training on the new WIDA standards, and technical assistance on aligning WIDA standards with RTI practices.</li><li>• Targeted training to the school or district regarding the <u>SMARTER Smarter</u> Balanced <u>Consortium</u> Assessments.</li></ul>
<i>Learning Time and Support</i>
<ul style="list-style-type: none"><li>• Technical assistance on how to redesign the school day using <u>supplemental tutoring services</u><u>extended learning</u> and/or other opportunities (e.g., 21<sup>st</sup> Century Community Learning Centers).</li><li>• Access to and support with the Family Engagement Tool (FET).</li><li>• Technical assistance in the inclusion of families and the community in the school improvement planning and implementation process.</li><li>• School or district-wide training on Positive Behavior Intervention Supports (PBIS).</li></ul>
<i>Governance</i>
<ul style="list-style-type: none"><li>• Technical assistance in the design of governance policies and practices.</li><li>• Recommendations about capacity of school and/or district leadership resulting from Instructional Core Focus Visits.</li><li>• Technical assistance in the alignment of <u>S</u>state funds (e.g., technology funds, dual credit, pay-for-performance, etc.) with turnaround principles and the policies necessary to ensure their success.</li></ul>



In addition to the system-wide recommendations that can be made, Focus Visits provide a diagnostic review which gives district leadership the information necessary to meet the first turnaround principle (providing strong, effective leadership). From the initial Focus Visit, the district and the SEA will have sufficient information to determine whether the principal should be replaced or has sufficient capacity. This must be reflected in the school's Turnaround Plan.

The Focus Visit provides a depth and breadth of information about district leadership capacity as well. This assists with the State's determinations about the potential need for changes in district leadership, and the degree to which intervention from the state is required. Due to the complexities of local control, special consideration is given to the needs of district leadership. At times, districts are in need of improvement due to governance issues that can be changed through coaching of the superintendent and cabinet level staff. For this, the **S**state will utilize support mechanisms to provide coaching. In other contexts, district leaders (e.g., superintendents or cabinet staff) may not have the capacity or may be unresponsive to external support. In this situation, the **S**state will work directly with the local board of trustees to make recommendations regarding staffing. Recommendations may be paired with positive or negative incentives for change, such as providing extra grant funding to solve specific concerns or withholding funding until conditions are met. In rare cases, district leaders have sufficient capacity and are responsive to supports, but they are restrained by decision making and policies of the local school board.

In severe circumstances, the **S**state will work directly with the community to inform stakeholders about the needs of their district since only the local community can facilitate a change in trustee membership.

Under these conditions, the State reserves the right to withhold any or all federal funding for use in providing services directly to the students, families, and community of that school district in a manner that will ultimately result in turning around the performance of the district.

Such services may include, but are not limited to:

- Contracting services, such as before and after school tutoring for students
- Providing transportation of students to other school districts
- Enrolling students in a virtual charter school and redirecting funds to that school
- Reserving a percentage of funds for the **S**state to conduct public meetings, provide public notices, and work with the public to make necessary decisions about yearly school board elections

**WISE Tool Improvement Planning Supports: Local Peer Review** -- ISDE supports the development of school and district leadership capacity through a **S**state and local improvement plan review process that builds a common vision. The State expects districts to be the first line of support for the lowest performing schools and provides training to district leadership teams to fulfill this role. The **S**state has developed a common language regarding the characteristics of effective schools that is designed into the WISE Tool and its improvement planning processes.



When school-level plans are required (~~One-, Two-, and Three-Star Schools~~), the State expects districts to provide technical assistance at every point prior to submission of the plan to the State. Thus, the State provides a rubric for districts to use in the review of school plans and requires districts to submit copies of their review rubric to the ~~S~~state to demonstrate that assistance has been provided. The expectation is that the district will use standards of review equal to or higher than what the State has described during district training opportunities, that it will work with the school until planning and implementation meets with local standards, and that it will not submit a plan until it is of high quality. The ~~S~~state then conducts an independent review and returns that feedback to the district and school. Where there are differences in state and local scoring of the rubric, the State returns the plan for revisions, which creates a space for conversation around what effective practice and planning truly are and leads to determinations about the types of technical assistance the State needs to provide to the district. This design encourages a capacity building relationship between the State and district and the district and school. With this in mind, peer review of improvement plans is a critical component of the state's accountability model. It enables collective knowledge to be built at the school, district, and ~~S~~state level.

**Graduation Rate Considerations:** Graduation rates for all students are an essential element of the Star Rating performance framework, which drives decisions about what schools and districts are required to do. For districts and schools that must submit and implement improvement plans, graduation rates will be included in the diagnostic review process and self-assessments that districts and schools do as part of the planning process. For example, the WISE Tool planning process will require leadership teams to identify areas in the performance framework (e.g., graduation rates) that are low and then develop SMART goals that are matched to the demonstrated areas of need. Those SMART goals then become a foundation for thinking about the WISE Tool plan overall for whichever version the district or school is required to submit (i.e., Continuous Improvement, Rapid Improvement, or Turnaround Plans).

Additionally, during the Focus Visit for One-Star schools, the State Support Team utilizes the data from the Star Rating performance framework as part of the analysis process. If a district or school has graduation rates that are low, the Focus Visit will take that into consideration in relation to the recommendations that are made.

Lastly, high schools that are required to submit improvement plans will have access to new indicators developed by the Center on Innovation and Improvement. If graduation rates are in need of improvement, the district and school will have specific indicators for which to include objectives and tasks in their improvement plans. For example, the following WISE Tool indicators are available to prompt improvement planning in ways that keep students on track for graduation.

- The school provides all students with academic supports (e.g., tutoring, co-curricular activities, tiered interventions) to keep them on track for graduation.
- The school provides all students extended learning opportunities (e.g., summer bridge programs, after-school and supplemental educational services, Saturday academies, enrichment programs) to keep them on track for graduation.
- The school provides all students with opportunities for content and credit recovery that are integrated into the regular school day to keep them on track for graduation.



Currently, disaggregated graduation data are unavailable. During the transition period to the new graduation calculation, Idaho will utilize disaggregated information from dropout rates in order to inform decision-making. For example, dropout rates will be used to inform Focus Visits and expectations for improvement planning. The historical disaggregated information for ethnicity dropouts can be found at the bottom of the page at this link: [http://www.sde.idaho.gov/site/statistics/statistical\\_data.htm](http://www.sde.idaho.gov/site/statistics/statistical_data.htm).

## FAMILY AND STUDENT SUPPORT OPTIONS

### **School Choice**

Under Idaho's ESEA Waiver, districts and schools will no longer be required to offer Supplemental Education Services (SES) and School Choice. In addition, the State will no longer require districts to set aside any percentage of the district allocation of Title I-A funds for School Choice and SES. In its place, Idaho will require ~~School Choice only~~ in its lowest performing schools and districts that are identified under the One-Star and Two-Star categories to provide a plan, within the WISE Tool, for how they will meet the needs of students who are currently not proficient and who have not made adequate growth on either the Reading, Math or Language Usage ISAT. This plan must include information on how the district or school will provide students with extended learning time and make students and parents aware of their enrollment options. These plans will be reviewed and must be approved by the ISDE to ensure that what the district and school proposes, meets the minimum qualifications and expectations for extended learning time and enrollment options. If it does not, they will be required to revise their plan to meet these expectations. One-Star and Two-Star districts and districts with One-Star and Two-Star schools must adhere to the following requirements ~~to in offering school choice extended learning time and making students and parents aware of their enrollment options~~:

- ~~First, the district must set aside a full 10 percent of its Title I-A funds for Supplemental Tutoring Services and Choice Related Transportation.~~
- ~~Second, the~~ The district must send notification to eligible students, as defined above,<sup>48</sup> at least 14 days prior to the beginning of the first day of school that they are eligible for extended learning time and make parents and students aware of their enrollment options.
- ~~Third, the~~ The district must offer ~~School Choice~~ eligible students extended learning time and make those students and their parents aware of their enrollment options in ~~for~~ any school within the district that is identified as a Two-Star or One-Star school.
- ~~Lastly, Enrollment options available to students and their parents~~ School choice can be met through the use of the include but are not limited to a district open enrollment policy as identified and governed by 33-1402 Idaho Code, Dual Enrollment as identified and governed by 33-203 Idaho Code, Virtual Education Programs as identified in 33-1619 Idaho Code, Online Courses as identified and outlined in 33-1627 Idaho Code (Attachment 14), the Idaho Digital Learning Academy, the Idaho Education Network,

<sup>4</sup> Districts that have met their School Choice and Supplemental Tutoring Services obligations may reduce the amount of the 10 percent set aside according to rules defined in Attachment 12 on set aside requirements

<sup>48</sup> Eligible students are those who are classified as basic or below basic in any of the subject areas within the accountability system. Attachment 14 – Family and Student Support Options



and ~~public charter schools including virtual public charter schools as well as any public school in the State.~~

- ~~The school leadership must evaluate the school schedule and redesign the schedule to include time for extended learning opportunities for eligible students.~~
- ~~Extended learning time must occur outside of the time allotment that counts toward Average Daily Attendance. This may be before school, after school, during the summer, or within the school day if the program is designed to extend learning time beyond that which is required by the State or if it provides support during times not traditionally scheduled for classes (e.g., lunchtime).~~
- ~~Extended learning time services must be provided by individuals who have a demonstrated track record of teaching students and ensuring significant academic growth (e.g., certified teachers, reading or mathematics specialists, highly qualified and experienced paraprofessionals, or external providers that have met high standards of performance).~~
- ~~Extended learning time must be provided to participating eligible students for a minimum of 2 hours per week for at least 28 weeks (i.e., 56 hours of additional learning time).~~
- ~~A school or district may cease extended learning time services before this time at the request of the student's family.~~
- ~~If a student demonstrates he or she is proficient in the subject area that is being covered by the extended learning time before the 56 hours are finished, a school or district may present progress monitoring and/or benchmark assessment data to the family in order to make a recommendation that the extended learning time is no longer needed. However, it is the family's final decision regarding whether or not to continue the extended learning the entire length of time.~~

*Transition period:* The State is holding AYP targets for use during the 2012-2013 school year while introducing the new performance framework. Existing NCLB improvement timelines will continue to be in place until Spring 2013. However, in order to transition to the new accountability system, any district or school that currently is required to offer school choice may immediately take advantage of the flexibility described by the definition of enrollment options and extended learning identified school choice in this waiver.

In other words, any school in improvement, corrective action, or restructuring ~~must continue to offer school choice but~~ may meet its obligation under the new definition for eligibility and extended learning time and enrollment options ~~set aside~~ outlined in this waiver application.

#### **Supplemental Tutoring Services**

~~Supplemental Tutoring Services (STS) will take the place of Supplemental Education Services (SES) and will be required in all One and Two Star schools and districts. STS shall be defined as~~



additional academic support provided to eligible students<sup>19</sup> to enable them to catch up or keep up to standards and expectations in core academic content areas. This may include social and emotional support mechanisms, provided that they are strategically linked back to core academic content subjects in a meaningful way. Additional academic supports through STS must be provided in such a way as to extend learning time beyond the regular school day.

Therefore, STS must occur outside of the time allotment that counts toward Average Daily Attendance. This may be before school, after school, during the summer, or within the school day if the program is designed to extend learning time beyond that which is required by the State or if it provides support during times not traditionally scheduled for classes (e.g., lunchtime tutoring services). STS services must be provided by individuals who have a demonstrated track record of teaching students and ensuring significant academic growth (e.g., certified teachers, reading or mathematics specialists, highly qualified and experienced paraprofessionals, or external providers that have met high standards of performance).

STS differs from SES in that the school district has the obligation to design and provide the services and is not required to offer services through a list of multiple external providers. School districts must put out a request for proposals (RFP) and select at least one external provider in order to design and deliver STS services that aligns with the district's and school's improvement plans. The district must select such providers through its standard procurement policies in order to promote fair business practices. The state will no longer maintain a list of approved providers; rather, the district is expected to exercise sound judgment in the selection of external STS partners. (ISDE will monitor STS plans as part of its review process for the district and school.) If no proposals are received that satisfactorily meet the district's RFP requirements, the district may develop a plan in which, pending ISDE approval, the district may provide its own STS services.

Supplemental Tutoring Services must be provided to participating eligible students for a minimum of 2 hours per week for at least 28 weeks<sup>20</sup> (i.e., 56 hours of additional learning time). A school or district may cease services before this time at the request of the student's family.

If a student demonstrates he or she is proficient in the subject area of the tutoring before the 56 hours are finished, a school or district may present progress monitoring and/or benchmark assessment data to the family in order to make a recommendation that services are no longer needed. However, it is the family's final decision regarding whether or not to continue services the entire length of time.

Funding of STS will be differentiated based on the context of each district and school. As mentioned elsewhere, STS will only be a requirement in One and Two Star Schools, but districts may choose to offer STS voluntarily in other categories. Districts will be required to set aside 10 percent of their district allocation of Title I-A funds for Choice and Supplemental Tutoring

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<sup>20</sup> The State may adjust the required hours for tutoring up or down as it learns about implementation practices.



~~Services. If the district or any of its schools is in the One and Two Star categories; it may substitute, if documented in the CFSGA, the use State, local, or other appropriate grant funds (e.g., 21<sup>st</sup> Century Community Learning Center grants) equal to this amount in order to meet this requirement. Because the performance of students in non Title I funded schools contributes to the overall performance and accountability of the district, districts may use the 10 percent set-aside to meet the tutoring obligations for eligible students in non Title I funded schools<sup>21</sup>. If a district meets its obligations for school choice and STS, it may reduce its set aside according to rules defined in Attachment 12.~~

~~Attachment 31 provides an initial draft of the criteria that will be used to evaluate district plans for STS. ISDE will be evaluating the following areas:~~

- ~~— The design of the program;~~
- ~~— How student progress will be monitored; and~~
- ~~• How communication between tutoring personnel, other school staff, and families of eligible student will be maintained.~~

~~Transition period:~~

~~Regarding students ~~that~~who were previous recipients of School Choice, the LEA must continue to allow such students to remain enrolled in the school of choice through the final grade level served by that school.~~

~~The State is holding AYP targets for use during the 2012-2013 school year while introducing the new performance framework. Existing NCLB improvement timelines will continue to be in place until Spring 2013. However, in order to transition to the new accountability system, any district or school that currently is required to offer supplemental education services (SES) may immediately take advantage of the flexibility described by the definition of supplemental tutoring services (STS) in this waiver. In other words, any school in improvement year two, corrective action, or restructuring must continue to offer additional academic support to students in the form of STS and may meet its obligation under the new definition for eligibility and set asides outlined in this waiver application.~~

## PROFESSIONAL DEVELOPMENT SET-ASIDE

A district will be required to set aside 10 percent of the Title I-A school allocation for any One- or Two-Star school or of the district allocation if it is a One- or Two-Star district for professional development. This set-aside will follow the same ~~regulatory~~ structure as that which exists for schools in school improvement, corrective action, or restructuring and for districts in improvement or corrective action. On the other hand, the district may substitute State or local funds in an amount equal to or greater than the required 10 percent of Title I-A funds, if it has reason to do so in order to promote financial flexibility. In the event that a district takes this flexibility, it will be required to submit documentation to ISDE of the amount budgeted, the amount spent, and the actual activities and expenditures out of state and local funds.

<sup>21</sup>~~The flexibility for the use of Title I funds in non Title I schools is described fully in Attachment 12 on set-aside requirements and optional flexibility.~~



| In the case of non-Title I-A funded schools in the One- and Two-Star categories, and because such schools may be contributing to the district's inability to meet the needs of all learners, a district must demonstrate that it has devoted professional development services to that school from State or local funds or other grant funding sources (e.g., Title II-A district allocation or the district level professional development set-aside) in an amount equal to or greater than the amount that would otherwise be required if the school were operating a Title I program.

Examples of how districts or schools may use professional development set-aside funds include, but are not limited to, the following:

- Providing job-embedded coaching opportunities for teaching staff in core academic content areas.
- Providing district leadership institutes or academies focused on providing the capacity for continuous improvement and turnaround leadership.
- Training administrators who are responsible for instructional leadership and teacher evaluation on the effective use of formative teacher feedback (e.g., the Danielson Framework) and how to effectively design coaching and training opportunities in individual and group areas of weakness based on evaluation data.
- Training staff on (and monitoring the implementation of) new instructional programs and/or the use of data to inform decision making about instructional programs (e.g., Response to Intervention – RTI).
- Redesigning the collaboration structure of a school to develop better collaborative processes that will support the professional learning of staff members (e.g., professional learning communities).
- Developing staff understanding of how to effectively engage parents and the community in the improvement of academic performance across the school or district.
- Providing training and ongoing support for creating a positive school environment in important, non-academic factors, such as students' social, emotional, and health needs (e.g., Positive Behavior Intervention Supports – PBIS).

#### STATE FUNDING ALIGNMENT

| For schools and districts that are in the One-, Two-, or Three-Star Categories, Idaho will require annual plans to be submitted that are aligned with the improvement requirements of each context. These annual plans will be embedded into the WISE Tool as a supplemental plan on the Dashboard. ISDE will ensure alignment by including an approval process as part of the annual review conducted of improvement plans in the WISE Tool. Specifically, the funds which must be aligned are:

- **Pay-for-Performance- Hard-to-Fill and Leadership:** In addition to salaries, teachers and leaders can earn annual bonuses for taking on leadership duties or teaching in hard-to-fill positions. These funds are formula allocated to all districts. The district will need to ensure that, at minimum, funds used in One-, Two- or Three Star schools are aligned with the larger plan (e.g., the bonuses should be used to support the Turnaround Principles where appropriate).



- **Pay-for-Performance- Student Achievement:** Schools eligible for State distribution of Pay-for-Performance Student Achievement funds must have a plan on file with ISDE for how the entire school's eligibility for funds will be further broken down into eligible groups of employees within the school. These funds are based on either how well schools demonstrate (a) academic growth or (b) overall student achievement. The formula places all schools into quartiles, with higher shares of the State allocation determined by increasingly higher performance in growth, proficiency or both. It is possible that persistently low-achieving schools will receive a share of the allocation.
- **Technology funds:** ~~Idaho~~ The Idaho Legislature approved a new, ongoing funding allocation for technology. As such, districts are required to submit plans yearly regarding how their technology funds will be used and tied to student achievement outcomes. Districts with One-~~Star~~ or Two-~~Star~~ Schools are required to detail how the use of these funds specifically align with the systemic improvement necessary in each school (e.g., for a school that must implement the Turnaround Principles, the district must describe how technology will improve curriculum, instruction, assessment, data utilization, etc.
- **Dual Credit:** Idaho is providing funding for secondary schools in order to pay for the costs of up to 36 credits of dual enrollment for each eligible student. Districts with schools in the One-, Two- or Three-~~Star~~ status are required to detail how they will ensure that such opportunities are provided for all eligible students, especially those at risk. The district will also be required to explain how they are using dual credit funding to improve the design of the entire school program.
- **Teacher and Administrator Evaluations:** Teacher and administrator performance evaluations in Idaho already require a strong tie to student performance metrics (at least 50%). The State will require One-, Two-, and Three-~~Star~~ schools to demonstrate how the application of teacher and administrator evaluations enhances their improvement plans. Further, the WISE tool also includes criteria in which these identified schools must describe how they will strategically place teachers in the areas of highest need.

Through its annual review, ISDE will only approve district and school plans that ensure high quality alignment of these funding sources (required only of One-~~Star~~ and Two-~~Star~~ Schools i.e., Focus and Priority Schools. Plans deemed to be lacking alignment will not be approved, and districts will be expected to revise them at the district and/or school level as necessary. If a district is unable to create alignment, ISDE will provide technical assistance in how to utilize these funding sources.

#### OTHER STATE FACTORS THAT SUPPORT IMPROVEMENT

In addition to the work and experiences described above, Idaho has developed other tools that are intended to support the academic achievement of specific student groups.

1. \$5,000,000 is allocated annually to provide remediation services for students who have not scored proficient on the ESEA accountability assessment. These funds are provided as an incentive to support school districts in their improvement efforts in that the



distribution is conditioned on a match of at least one dollar in local expenditures for every two dollars in distributed State funding.

2. Another remediation program has been institutionalized providing early intervention for students in grades K-3 who are highly at risk of failing to master intended reading skills. The State has historically allocated approximately \$2 million for this purpose to provide supplemental reading instruction.
3. As part of the Students Come First legislation, Idaho has placed new emphasis on paying hiring bonuses for hard-to-fill positions; especially those that involving work with low-achieving, special education, and limited English proficient students.
4. The Students Come First legislation also provided a mechanism to incentivize student growth in order to encourage improvement among schools with student groups that may struggle in school. School staff members are eligible for pay-for-performance bonuses when their school has performed according to set benchmarks for students' academic growth.
5. Additionally, ISDE has partnered with the University of Idaho's Center on Disabilities and Human Development to create the Idaho Assistive Technology Project (IATP). This project provides training and support Statewide concerning Universal Design for Learning (UDL) as it relates to lesson design and assistive technologies.

In addition to incorporating differentiated support mechanisms into the Statewide System of Support, the above are intended to document some of the more significant initiatives and projects Idaho has put into place to address the unique needs of students who are low-achieving or otherwise at risk of educational failure.

*2.A.i.b. Does the SEA differentiated recognition, accountability, and support system create incentives and provide support incentives and provide support to close achievement gaps for all subgroups of students?*

Idaho's educational system provides for incentives aimed at encouraging and rewarding schools closing achievement gaps that may exist among and between groups of students. The system includes a mix of incentives intended to stimulate substantial and continuous improvement.

Idaho's Statewide System of Support has been designed to help schools and teachers close achievement gaps that may exist between various student groups. As described in Section 2.A.i.a., the system provides for multiple support mechanisms.

The data on student performance and growth that drive identification for focus, priority, and rewards schools, include definitive information concerning the achievement and growth of all students including those with disabilities, English language learners, and those who are low-achieving.



In Idaho, schools ~~in the Four- or Five-Star category that are nearing, meeting, or exceeding State expectations for students' academic growth~~ are afforded more flexibility in relation to planning, use of discretionary funds, and participation in support activities. This serves as a positive incentive for schools to continue their improvement efforts. For example, a school that reaches the Four-Star category has demonstrated effective school performance and can choose the type of planning process for continued improvement. The school may choose to use a planning tool outside of the State system. Further, there is no requirement for notifying parents of enrollment options~~school choice~~ or supplemental tutoring services~~extended learning time~~, but the school can provide same if they best serve given student needs.

Lastly, Idaho has chosen to lower the minimum number (N) for making accountability determinations regarding the achievement status of various student groups. Previously,  $N \geq 34$  was the threshold. The public reporting threshold has been  $N \geq 10$ . ISDE will now make accountability determinations for all student, all ESEA subgroups and the At-Risk Subgroup~~groups~~ meeting  $N \geq 25$ . This lowering of the threshold will serve to highlight achievement gaps that may have previously been masked by low N counts.

*2.A.i.c. Does the SEA's differentiated recognition, accountability, and support system include interventions specifically focused on improving the performance of English Learners and students with disabilities?*

The Response to Intervention (RTI) framework is an integral part of Idaho's efforts to meet the educational needs of all learners, including English language learners and students with disabilities. Idaho's Statewide System of Support embeds the RTI conceptual framework into virtually every program and makes explicit connections to school improvement planning. For example, the clusters and indicators within the WISE Tool are aligned to the RTI framework so that schools and districts can plan for RTI while simultaneously planning for school improvement.

Using the RTI framework as part of our Statewide System of Support, ISDE works to ensure solid instruction in the core academic program for all students (Tier I), intervention and prevention support for those who need it (Tier II), and intensive support for those who are most in need (Tier III).

The State differentiates its support accordingly to assist schools and districts to meet the needs of English Language Learners (ELLs). As with students with disabilities, the State's support programs provide training and coaching for how to meet the needs of all learners, starting with core instruction (Tier I). However, many ELLs need two types of Tier II intervention—one that is academically focused and one that is linguistically focused. ISDE has provided tools, resources, and guidance in these areas.

Similar to what has already been described above, the State's support programs broker resources to ensure that schools and districts are matched with the supports they need. For example, if a Capacity Builder is working with local leadership and identifies a need to improve outcomes for ELLs, the Capacity Builder would connect the school or district to training opportunities and external expertise available from ISDE or institutions of higher education.



Additionally, if a school is struggling with meeting the needs of ELLs, ISDE will identify this need as it evaluates the local improvement plan. The State's Title III Coordinator participates in review of school improvement plans in order to provide feedback for the needs of the schools and districts.

These design elements in the Statewide System of Support ensure that the needs of all ELLs are addressed, but especially in schools in the One- and Two-Star categories in which the State is working most directly.

For students with disabilities (SWDs), ISDE provides training and coaching regarding how to best support these students. The ISDE makes sure schools and districts have the support and expertise they need to best meet the needs of their students. For example, if a school in the One-Star category needs support with SWDs, the Idaho Building Capacity Project targets Capacity Builders whose area of expertise is in Special Education for that school.

Or, for example, if training in such things as secondary transitions, identification of specific learning disabilities, or supporting the instructional needs of students with significant cognitive impairments is needed, schools are connected with experts at ISDE or institutions of higher education who can provide that training.

*2.A.i.d. Did the SEA provide a plan that ensures that the system will be implemented in LEAs and schools no later than the 2012-2013 school year?*

Idaho is well positioned to implement this system by 2012-13 given the Students Come First legislation enacted in 2011 and as evidenced by the documentation presented elsewhere in this section. This legislation as well as initiatives such as adopting a growth model comprises the foundation of Idaho's Next-Generation Accountability System. There are only a few elements needing to be changed or accommodated within Idaho State Board of Education Rules to fully implement his system. Those requirements are identified throughout this document.

The public reporting schema (district, school, and student growth reports) is close to be finalized as are the growth components detailed in Section 2.A.a. are required for the pay for performance laws. That reporting structure will be completely in place, as required by state law, in Summer 2012.

ISDE has determined the data analysis procedures and performance framework necessary to identify and implement the rewards and sanctions for schools and districts beginning in 2012-13. While the procedures for the identification of schools that are persistently low-performing will be new for the 2012-13 school year, the interventions and Statewide System of Support activities that will take place are built on existing programs and processes that have previously been successful in Idaho, such as the work done with the School Improvement Grant (SIG). These programs and processes will require only minor modifications, in most cases, and all of them will be ready for implementation in 2012-13.



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2.A.ii Select the option that pertains to the SEA and provide the corresponding information, if any.

<b>Option A</b> <input checked="" type="checkbox"/> The SEA only includes student achievement on reading/language arts and mathematics assessments in its differentiated recognition, accountability, and support system and to identify reward, priority, and focus schools.	<b>Option B</b> <input type="checkbox"/> If the SEA includes student achievement on assessments in addition to reading/language arts and mathematics in its differentiated recognition, accountability, and support system and to identify reward, priority, and focus schools, it must:  a. provide the percentage of students in the “all students” group that performed at the proficient level on the State’s most recent administration of each assessment for all grades assessed; and  b. include an explanation of how the included assessments will be weighted in a manner that will result in holding schools accountable for ensuring all students achieve college- and career-ready standards.
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**2.B SET AMBITIOUS BUT ACHIEVABLE ANNUAL MEASURABLE OBJECTIVES**

Select the method the SEA will use to set new ambitious but achievable annual measurable objectives (AMOs) in at least reading/language arts and mathematics for the State and all LEAs, schools, and subgroups that provide meaningful goals and are used to guide support and improvement efforts. If the SEA sets AMOs that differ by LEA, school, or subgroup, the AMOs for LEAs, schools, or subgroups that are further behind must require greater rates of annual progress.

<b>Option A</b>	<b>Option B</b>	<b>Option C</b>
<input checked="" type="checkbox"/> Set AMOs in annual equal increments toward a goal of reducing by half the percentage of students in the “all students” group and in each subgroup who are not proficient within six years. The SEA must use current proficiency rates based on assessments administered in the 2010–2011 school year as the starting point for setting its AMOs.  i. Provide the new AMOs and an explanation of the method used to set these AMOs.	<input type="checkbox"/> Set AMOs that increase in annual equal increments and result in 100 percent of students achieving proficiency no later than the end of the 2019–2020 school year. The SEA must use the average statewide proficiency based on assessments administered in the 2010–2011 school year as the starting point for setting its AMOs.  i. Provide the new AMOs and an explanation of the method used to set these AMOs.	<input checked="" type="checkbox"/> Use another method that is educationally sound and results in ambitious but achievable AMOs for all LEAs, schools, and subgroups.  i. Provide the new AMOs and an explanation of the method used to set these AMOs. ii. Provide an educationally sound rationale for the pattern of academic progress reflected in the new AMOs in the text box below. iii. Provide a link to the State’s report card or attach a copy of the average statewide proficiency based on assessments administered in the 2010–2011 school year in reading/language arts and mathematics for the “all students” group and all subgroups. (Attachment 8)



*Option C:*

*2.B. Option C: Did the SEA describe another method that is educationally sound and results in ambitious but achievable AMOs for all LEAs, schools, and subgroups?*

*i. Did the SEA provide the new AMOs and the method used to set these AMOs?*

The AMOs in Idaho's system are imbedded in each of the metrics in the matrix as well as for the overall performance of schools and districts. Idaho wanted to clearly distinguish high-performing and reward schools and, therefore, intentionally set the bar for the highest eligible points at a high threshold for all metrics.

Going forward, Idaho may request to adjust these targets when three years of data has been captured and when the new Common Core State Standards assessments are administered. Given that the Idaho statewide Student Longitudinal Data System has been in existence just ~~1-1/2~~ 2 years, a longitudinal comparison is not possible at this time. Also, some metrics, such as college entrance/placement exams were given for the first time in 2012 have not yet been administered and so therefore longitudinal data are is not available ~~for all students~~. Therefore, all metrics that were available were set based on a 2010-11 data and current Idaho State Board of Education strategic goals. It is clear that longitudinal performance provides a more complete picture and will allow the State to set targets that more accurately reflect higher standards.

In addition to benchmarks embedded within the achievement targets, Idaho will also set an Achievement Annual Measurable Objective (AMO) using a combination of Option A and C. Table 24 illustrates the progression Idaho has put into place for the AMOs.



**Table 24  
AMO Targets**

Subject	Current 2011-12 AMOs for AYP	Gap to 100%	Yearly Increase (Half of Gap/6 years)	2011-12 Goal	2012-2013 Goal	2013-2014 Goal
Reading	85%	15	1.3	85%	86%	88%
Mathematics	83%	17	1.4	83%	84%	86%
Language Usage	75%	25	2	75%	77%	79%

Schools were ranked based on the cumulative percent proficient and the starting point for 2011-12 was set at the current AMOs for Adequate Yearly Progress as allowed under a waiver granted by US-ED the U.S. Department of Education for each subject area (reading, mathematics and language usage). The AMOs are then set to increase toward the goal of reducing by half the percentage of students in the all student group and all four subgroups defined in Section 2.A.i. under “Growth to Achievement Subgroups.” who are not proficient within six years. Idaho has set these targets for only three years with the expectation of resetting targets when the new Ceommon Ceore Sstate Sstandards assessment goes into effect (2014-2015). The AMOs will be reported on the sSchool and dDistrict report card at the overall level and for each ESEA subgroup including all races and ethnicity, Limited English Proficient, and students eligible for Free or Reduced Lunch and Special Education students with disabilities and the At-Risk Subgroup. Schools with an overall rating of Three-Star or lower will be required to build into their Continuous Improvement Plan (Three Star), Rapid Improvement Plan (Two Star) or Turnaround Plan (One Star) a plan specifically for reaching the AMOs for any subgroup or overall group that does not reach the target. Further, the WISE tool indicators will be structured to focus on the AMOs in reading, language usage and mathematics. In addition, any Five-Star School that fails to meet an AMO in any subject at the overall or subgroup level will not be eligible for the classification of a Highest Performing School.

As such, the new rating system will actually hold more schools accountable than the existing NCLBESEA framework. Under the current NCLBESEA framework, 202 schools are identified for improvement, corrective action, or restructuring. More than 400 schools are not identified for any improvement activities. In other words, less than 35% of the schools in the Sstate are identified for improvement. Using the Star Rating performance framework, all schools will be held accountable. According to the first set of Star Ratings in 2010-11 2011-2012 Star Ratings, approximately 5540% of all the Sstate’s schools will bewere identified for the requirements associated with the Continuous Improvement Plan (other schools – 4025% of all schools), Rapid Improvement Plan (focus schools – 409% of all schools, 11% of Title I schools), or Turnaround Plan (priority schools – 5% of all schools, 5% of Title I schools). The Star Rating performance framework does not limit Idaho’s ability to hold LEAs



accountable; it increases it.

To further support progress towards attainment of AMOs, any Five- and Four-Star schools that miss the AMO for their At-Risk sSubgroup or have an achievement gap between their At-Risk sSubgroup and the rest of their student population greater than that obtained by the rest of Idaho's Two-Star Schools over two consecutive years, must submit a Continuous Improvement Plan that addresses the At-Risk sSubgroup gap and the actions the school will take to improve this area of performance.

For a school to exit these requirements, the school must implement the Continuous Improvement Plan for a minimum of one year, maintain a Three-, Four- or Five-Star rating and have meet the AMO for their At-Risk sSubgroup or have closed the achievement gap between their At-Risk sSubgroup and the rest of their student population to be less than Idaho's Two-Star Schools.

Idaho expects all schools, including those that are 4Four-Star and 5Five-Star schools that do not miss AMOs for the At-Risk Subgroup, to ensure a plan is put into place to address any ESEA subgroup (N>=25) that misses the AMO target for two consecutive years. This plan could include a Continuous Improvement Plan as is required for 3Three-Star Schools or it could include a specialized plan created by the district to address the specific needs of the subgroup to improve performance. This plan will be monitored and administered by the district.

**Achievement:** ISDE set the bar for excellence at a high threshold. In 2010-2011, aA total of ~~531~~ 511 schools had at least 84% of their students as proficient or advanced in reading, ~~454~~ 139 in language usage and ~~281~~ 290 in mathematics. A total of 6 schools received all points possible for proficiency distribution as illustrated in Table 25.



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**Table 25**  
**2010-2011 Proficiency Distribution of Schools and Districts**

Points	Percent Proficient and Advanced in Reading	Schools
		(N=622)
5	95% - 100%	88
4	84% - 94%	423
3	65% - 83%	100
2	41% - 64%	11
1	≤40%	-
Points	Percent Proficient and Advanced in Math	Schools
		(N=622)
5	95% - 100%	26
4	84% - 94%	264
3	65% - 83%	290
2	41% - 64%	32
1	≤ 40%	10
Points	Percent Proficient and Advanced in Language Usage	Schools
		(N=616)
5	95% - 100%	4
4	84% - 94%	135
3	65% - 83%	400
2	41% - 64%	67
1	≤ 40%	14



**Growth to Achievement:** The Idaho Growth Model was newly introduced to the State during 2011. ~~Preliminary calculations~~ Calculations for the **normative growth elements** have been made and Student Growth Reports ~~are in the process of being~~ have been distributed to schools and districts. The Median Student Growth Percentiles (SGP) is a normative measure; ~~and~~ therefore, a normative distribution is the outcome. In other words, the total median growth of schools is relative to the growth by other schools with similarly performing students in the State. However, the Adequate Student Growth Percentile (AGP) is a **criterion referenced growth target** that is relative to the proficiency target and the performance of each student. The necessary growth for each student is then combined for a median AGP.

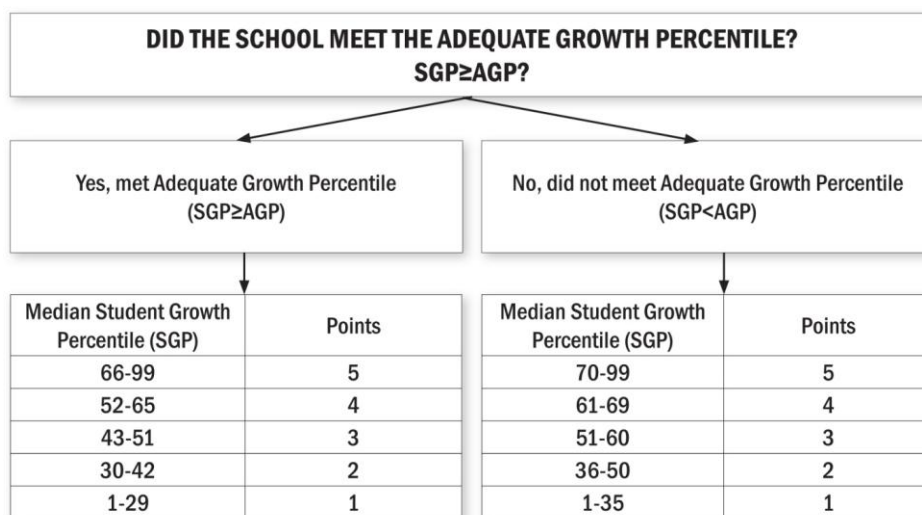
The Growth to Achievement metric sets goals high for all schools. Schools with a high percentage of students who are already proficiency are still expected to make growth. The targets for schools not making the median growth percentile are higher than for those schools that are already have high achievement. Yet, the Growth to Achievement metric still allows the State to place a strong emphasis on growth for all students within the accountability system. Idaho has adapted and is using the Student Growth Percentiles and growth formula first adopted and implemented by Colorado, and strongly researched by both, the SGP author, Damian Betebenner, and Colorado's team. Idaho's adaptation includes use of the foundations of Colorado's model and Adequate Student Growth Percentile (AGP) formulas for this metric as well as for Growth to Achievement Gaps metric.

Schools will be evaluated on whether the Median Student Growth Percentile (SGP) was greater than the Median Adequate Growth Percentile (AGP, considered adequate growth to get to the target within three years or by 10<sup>th</sup> grade). Schools with a SGP greater than the calculated AGP will follow one trajectory while those schools that have shown a lesser AGP than the SGP will have a steeper trajectory.

This is due to the emphasis placed on moving students who are farther behind faster. The distribution of the points for school is shown in Table 26.



**Table 26**  
**Adequate Growth Flowchart**



Illustrated in Table 27 is the 2010-11 Growth to Achievement point distribution among Idaho schools. Clearly, this metric will present a challenge for most Idaho schools to get to the highest point distributions with only 5% of schools that met AGP also having SGP growth high enough to earn 5 points in each subject.



**Table 27**  
**2010-2011 Growth to Achievement Point Distribution**

Subject	Met AGP		Did not meet AGP	
<i>Total Possible Points</i>	Schools	Districts	Schools	Districts
<b>Reading</b>	(N=576)	(N=132)	(N=8)	(N=1)
5	13	2	-	-
4	225	48	-	-
3	266	72	-	-
2	72	10	1	-
1	-	-	7	1
<b>Mathematics</b>	(N=525)	(N=125)	(N=58)	(N=8)
5	41	3	-	-
4	216	50	-	-
3	189	58	1	-
2	79	14	26	5
1	-	-	31	3
<b>Language Usage</b>	(N=525)	(N=125)	(N=55)	(N=8)
5	20	-	-	-
4	217	45	-	-
3	239	74	1	-
2	49	6	30	4
1	-	-	24	4

**Growth to Achievement Gaps:** Growth to Achievement Gaps calculations are made identically to the Growth to Achievement metric except that it is also done for each subgroup performance (Free and Reduced Lunch eligible, minority students, students with disabilities, and Limited English Proficient students). Idaho uses an approach to ensure students most at risk are identified in some way. Idaho will combine the subgroups to ensure those students' growth to achievement is built into the accountability matrix. Under the current system and without this grouping, it is possible and happens frequently for small subgroups of students to only be accounted for in the overall calculations and, therefore, masking their performance or gaps. Shown in Table 28 is the distribution of Growth to Achievement Gaps when using 2010-11 data. This table also shows the increase in schools and districts with an At-Risk Subgroup vs. when only ESEA subgroups are used.



**Table 28**  
**2010-2011 Growth to Achievement Subgroup Point Distribution**

Subject	<b>Super-At-Risk Subgroup</b>		<b>Had All Four Subgroups</b>	
	Schools	Districts	Schools	Districts
<b><i>Range of Possible % Points</i></b>				
<b>Reading</b>	(N=497)	(N=85)	(N=40)	(N=36)
<b>80 – 100%</b>	140	22	-	-
<b>60 – 79%</b>	185	44	2	9
<b>40 – 59%</b>	135	16	23	25
<b>20 – 39%</b>	37	3	15	2
<b>Mathematics</b>	(N=497)	(N=86)	(N=41)	(N=35)
<b>80 – 100%</b>	169	24	2	1
<b>60 – 79%</b>	161	33	7	3
<b>40 – 59%</b>	123	24	19	25
<b>20 – 39%</b>	44	5	13	6
<b>Language Usage</b>	(N=483)	(N=87)	(N=58)	(N=34)
<b>80 – 100%</b>	145	21	-	-
<b>60 – 79%</b>	204	34	14	-
<b>40 – 59%</b>	124	27	30	27
<b>20 – 39%</b>	10	5	14	7

This metric again clearly illustrates that fewer schools and districts are at the highest point ranges showing the targets are ambitious.

**Postsecondary and Career Readiness:** The metrics in this part of the accountability matrix are embedded in the Idaho State Board of Education’s ([ISBE”State Board”](#)) strategic goals.

- Graduation Rate: The [ISBE-State Board](#) set the high school graduation rate target at 90%. Therefore, the metric awards schools and districts that achieve at least 90% graduation rate with the highest amount of points. In 2010-11, the graduation rate distribution for Idaho schools and districts included 138 schools and 97 districts achieving a 90% graduation rate or better.

Conversely, the lowest point award is for a graduation rate of 60% or lower. This threshold was selected to mirror and aspect of the priority school definition in the waiver.



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Table 29 details the distribution of graduation rates among Idaho schools and districts.

**Table 29**  
**Total Number of Schools Achieving**  
**Graduation Rate Distributions [for 2010-2011](#)**

<b>Graduation Rates</b>	<b>Schools (N=166)</b>
90% - 100%	135
81% - 89%	14
71% - 80%	5
61% - 70%	2
≤ 60%	10

- College Entrance/Placement Examinations: Idaho will implement a requirement for all 11<sup>th</sup> graders to take the SAT, ACT, ACCUPLACER, or COMPASS tests in Spring 2012. At present, the only data the State has is for the self-selected population of students who have previously taken one of these tests. Presented in Table 30 are data from the past two years of performance on these exams. Starting in 2012, the State will have data for all students on one of these assessments.

**Table 30**  
**College Entrance/Placement Exam Composite Scores**  
**and Total Students Participating**

<b>College Entrance/Placement Exams</b>	<b>State Composite Score (2009-10)</b>	<b>Total Students (2009-10)</b>	<b>State Composite Score (2010-11)</b>	<b>Total Students (2010-11)</b>
SAT	1509	3,336	1598	3,557
ACT	21.8	10,647	21.7	11,321
COMPASS	NA		NA	12,412
ACCUPLACER	NA	98	NA	231

*Prior to Spring 2012, students were not required to take any of these exams. In Spring 2012, the requirement will go into effect and the State signed a contract to offer the SAT or ACCUPLACER free to all students. COMPASS composite scores were not collected by the State or available from ACT for 2009-10 or 2010-11.*



Idaho ~~will~~ established a benchmark score having the highest probability that a student will not need remediation in entry-level college mathematics and English courses and the metric will give points for the percentage of students that reach these set benchmarks. For example, the College Board has established that a composite score of 1550 on the SAT indicates an increased probability of success in college.

This benchmark will be evaluated by ISDE to determine the score where students are best prepared for college and professional technical courses at Idaho institutions of higher education. During ~~Summer~~ spring 2012, the Idaho colleges and universities ~~will~~ convened to agree upon a set cut-score for the ACCUPLACER. That score ~~will be~~ is used for this measure. The benchmarks for the ACT and COMPASS ~~will either be~~ were set ~~by the same process and adopted by ISBE or be set by ISBE based on past placement requirements of the State's colleges and universities based on ACT's research on scores that demonstrate the best possibility for success in college level courses.~~

Given that these exams ~~will be~~ were administered to all Idaho public school students for the first time in Spring 2012, it is expected the overall performance will be lower. Also given the need to set AMOs at ambitious but achievable levels, Idaho has chosen to set the points eligible within this metric at a lower target initially. After the first two years of administration of these exams, Idaho will reevaluate the distribution of the percentage of students meeting those benchmarks and coordinate with Idaho's colleges and universities to determine if the benchmarks need to be reconsidered.

- Advanced Opportunities is also ~~an a State Board~~ ISBE strategic goal. As noted earlier, Idaho has not only set targets for providing more students more advanced study opportunities, but has also formalized those goals in the form of funding for up to 36 credits of dual credit enrollment for students who have met all graduation requirements before their senior year.
- Under this AMO, Idaho set two ambitious goals. First, the points available are based on the percentage of the total eligible population (defined as all juniors and seniors) taking at least one advanced study opportunity defined as an Advanced Placement (AP), International Baccalaureate (IB), dual credit, or tech prep course. ~~ISBE's~~ The State Board's strategic plan goals for each of these opportunities are varied. Illustrated in Table 31 are the Board's goals, the current percentage of students engaging in advanced opportunities, and the percentage of the students taking classes in which they received a grade of C or better for the course.



**Table 31  
State Board Strategic Goals for Advanced Opportunities and  
2010-2011 Statewide Numbers**

Advanced Opportunity	State Board Goals (Percent of Students)	2010-11 Statewide Percent of Students	2010-11 Percent of Students Achieving C or better
AP	10%	7.7%	92%
IB	No goal	1.2%	89.4%
Dual Credit	25%	12.0%	Collection begins March 2012
Tech Prep	27%	22.9%	Collection begins March 2012

*2010-11 AP data are the percent of students taking an AP exam, not enrolled in an AP course.*

Given the varied data on this metric and the low numbers of participants currently, Idaho believes that it has set an ambitious but attainable goal. Further, Idaho is committed to not only providing opportunities but to ensure that those opportunities transcend into positive outcomes for students; thus the inclusion of a passing grade. These goals will be reconsidered after two years of data are available and after evaluation of the success of offering these opportunities throughout the State.

**Table 32  
Point Matrix for Advanced Education Opportunities**

Advanced Opportunity Eligible Points	Percent Completing an Advanced Opportunity Course with C or better				
<i>Percent Completing Advanced Opportunity</i>	90%-100%	75%-89%	60%-74%	40%-59%	≤ 39%
50 - 100%	5	5	3	2	1
25% - <del>50</del> 49%	5	4	3	2	1
16% - 24%	4	4	3	2	1
6% - 15%	3	2	2	1	1
≤ 5%	1	1	1	1	1



**Participation Rate:** Idaho subscribes to the importance of including all students so much so that this metric was determined to override all other performance and growth by a school or district if a 95% goal is not met at all [ESEA](#) subgroups and all student levels.

Schools and districts must test 95% of all students and all subgroups in reading, mathematics and language usage. This goal was set as a continuation the current law set in Idaho Administrative Code (IDAPA 08.02.03.112.04.b).

*ii. Did the SEA provide an educationally sound rationale for the pattern of academic progress reflected in the new AMOs?*

The rationale for each target set was outlined in Section 2.B.i above. The current performance of schools as well as the increasing goals set for the State, were balanced to provide ambitious yet attainable goals throughout all the metrics. The final Star Designation for each school and district is the cumulative effect of the all the metrics and thereby validly results in the schools designated needing the greatest intervention by the State and impacted school district. As noted throughout the related description, the AMOs will be reexamined when additional data become available and goals will be reset to continue the progression of performance standards expected for the high performance for all schools and districts.

*iii. If the SEA set AMOs that differ by LEA, school, or subgroup, do the AMOs require LEAs, schools, and subgroups that are further behind to make greater rates of progress?*

Idaho does not require different AMOs for districts, schools, or subgroups. However, the Adequate Student Growth Percentile within the Growth to Achievement and Growth to Achievement Gaps metrics requires more growth by those students that are further behind in order to have made adequate growth.

*iv. Did the SEA attach a copy of the average statewide proficiency based on assessments administered in the 2010-2011 school year in reading/language arts and mathematics for the "all students" group and all subgroups? (Attachment 8)*

Included in Attachment 8 is a detailed description of the average Statewide proficiency for all students and subgroups in reading and mathematics. The Idaho Report Card can be found at: <http://devapps.sde.idaho.gov/ReportCard/Results?Scope=state&SchoolYearId=8&DistrictCode=999&SDESchoolCode=999>.

However, at present Idaho uses an indexing formula to calculate proficiency for Adequate Yearly Progress (AYP). Under this formula, basic students are counted as 0.5 proficient. Therefore, the percentage of proficient and advanced students is more accurately represented in Attachment 8.



## 2.C REWARD SCHOOLS

2.C.i Describe the SEA's methodology for identifying highest-performing and high-progress schools as reward schools.

~~Currently in Idaho, two awards are given annually the Idaho State Board of Education for the highest performing and highest progress schools. Both awards are based on a school's performance on the ISAT and the ISAT-Alt. This reward system will change under Idaho's application for *ESEA Flexibility*.~~

~~Idaho will replace its current reward system with **one** reward for all schools that earn "Five Star School" status under Idaho's next generation accountability system. Five Star Schools will be determined under Idaho's new Accountability Plan (see methodology for determining Five Star School in Section 2.A.i.). A school must be a Five Star School in order to be nominated for national awards, such as the National Blue Ribbon Award or Distinguished School Awards. Five Star Schools identified for rewards status will be done so consistent with the definition of either a "highest performing school" or a "high progress school" as set forth in the *ESEA Flexibility* document. The use of Title I funds in connection with the recognition of rewards schools will be limited to Title I schools receiving that recognition.~~

~~Additionally, ISDE plans to conduct two (regionally) focus groups in Spring 2012 with stakeholders to solicit suggestions for additional reward strategies for high performing and high progress schools and to assess the potential support (as well as the likelihood of being able to implement same) for the additional strategies that are put forth. The goal of this effort is to determine a richer, fuller range of potential rewards.~~

Currently in Idaho, two awards are given annually by the Idaho State Board of Education for the highest-performing and highest-progress schools. Both awards are based on a school's performance on the ISAT and the ISAT-Alt. This reward system will change under Idaho's application for *ESEA Flexibility*. Idaho will replace its current reward system with **one** based on the Star Rating System in which schools will be recognized based on two categories of recognitions: highest-performing and high-progress. All schools, including Title I schools, may attain recognition in either category. A school must be recognized in one of these categories in order to be nominated for national awards, such as the National Blue Ribbon Award or Distinguished School Awards. For 2011-2012, the reward schools will be determined based on the *ESEA Flexibility* definition for Highest-Performing and High-Progress schools and must be rated a Four- or Five-Star School. In 2012-2013 and beyond, the Highest-Performing and Highest-Progress reward schools will be defined through the following criteria.

### Highest-Performing Schools:

Recognition - The Star Rating System is compensatory, meaning that to attain Four or Five Stars, a school must have high absolute performance in the all students group for Reading, Math, and Language Arts. In addition, the school must demonstrate strong performance in student growth and, where applicable, measure of secondary school success such as graduation



rate. Therefore, the Star Rating performance framework is used as the metric to determine Highest-Performing Schools. A Highest-Performing School is one that meets the following criteria:

- In the most recent three years has been rated with a Five--Star Rating for at least two out of three years, AND
- The remaining year attained no less than a Four--Star Rating, AND
- Meet the AMOs in all subjects for overall students and all ESEA sSubgroups, AND::
- Be among the top five percent of Title I schools in the all students proficiency, AND
- Be among the top ten percent of Title I schools in the proficiency gaps between the highest and lowest achieving subgroups and between the at-risk and not at-risk subgroups, AND

Transition Period: Because the ESEA Flexibility definitions require analysis of performance over a number of years, these criteria are based on three years of Star Rating data. However, that data will not be available until spring 2014. During the transition to the new system, the definition will be the following:

- Spring 2012— Schools must attain a Five Star and have met AYP for most recent two consecutive prior years (i.e., in spring 2010 and 2011).
- Spring 2013— Schools must have attained a Five Star in one of the most recent two consecutive years and not less than a Four Star in the other year, and the school must also have met AYP in spring 2011.
- Spring 2014— the full definition above goes into effect based on three years of Star Ratings.

NOTE: A final list of highest performing schools based on these criteria will be provided to the U.S. Department of Education at the close of the Star Rating appeals window in August 2012.

#### High-Progress Schools:

As with Highest-Performing Schools, High-Progress Schools will be determined using the Star Rating Performance Framework. A school that attains a rating of Three Stars or less has demonstrated areas of performance that need to be improved. Improvement over time will result in changes on the Star Rating Scale. A High-Progress School is one that has met the following criteria:

- Previously attained a Three--Star Rating or less for two or more consecutive years, AND
- In the most recent two years has improved to and consecutively maintained a Four--Star Rating or better, AND
- Be among the top five percent of Title I schools in the all students proficiency, AND
- Be among the top third of Title I schools in the proficiency gaps between the highest and lowest achieving subgroups and between the at-risk and not at-risk subgroups, AND



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- Be among the top third of Title I schools in the lowest achieving subgroup proficiency and at-risk subgroup proficiency, AND
- Be among the Title I schools making the most progress in increasing graduation rates.;

Transition Period: Because the ESEA Flexibility definitions require analysis of performance over a number of years, these criteria are based on two baseline years and two improved performance years of Star Rating data (i.e., four years in total). However, that data will not be available until spring 2015. During the transition to the new system, the definition will be the following:

- Spring 2012— Schools must attain a Four Star or better, made AYP in spring 2011, and been in improvement status based on spring 2010 and 2009 data.
- Spring 2013— Schools must have attained a Four Star Rating or better in spring 2013 and 2012, and have been in improvement status based on spring 2011 and 2010 data.
- Spring 2014— Schools must have attained a Four Star Rating or better in spring 2014 and 2013, and have been in improvement status based on spring 2012 and 2011 data.
- Spring 2015— the full definition above goes into effect based on four years of Star Ratings.

NOTE: A final list of Hhigh Pprogress Sschools based on these criteria will be provided to the U.S. Department of Education at the close of the Star Rating appeals window in August 2012.

#### **-Financial Rewards:**

The use of Title I funds, such as those authorized under ESEA Section 1117(c)( 2), in connection with the recognition of rewards schools will be limited to Title I schools receiving that recognition. Additionally, ISDE plans to conduct two focus groups (regionally) in Spring Fall 2012 with stakeholders to solicit suggestions for additional reward strategies for Hhigh-Pperforming and Hhigh-Pprogress schools and to assess the potential support (as well as the likelihood of being able to implement same) for the additional strategies that are put forth. The goal of this effort is to determine a richer, fuller range of potential rewards.

All Highest--Performing and High--Progress schools will be granted flexibility in numerous areas. First, they may use the WISE Tool optionally, if they desire to do so, at no cost to the district or school. Second, they may access Statewide System of Support services and programs at their option. Third, they are not required to set aside Title I funds for professional development, but they are given the optional flexibility to do so. Fourth, they are not required to set aside Title I funds for supplemental tutoring services, but they may do so if they deem it benefits their educational program. FifthFourth, they are not required to report on Sstate funding alignment. In these ways, reporting burdens have been reduced for these schools and financial flexibility will be granted consistent with Title I requirements.

2.C.ii Provide the SEA's list of reward schools in Table 2.

Idaho has produced a list of star ratings for all schools. The aggregate data for that preliminary designation is included in Table 2. A de-identified preliminary list of all the Title I schools for



~~2011-2012, their priority, focus, and reward status categories~~ schools are provided in Table 2. In ~~spring-summer~~ 2012, Idaho ~~will~~ provided an appeal process, in the same format as the current Adequate Yearly Progress (AYP) appeals, whereby districts ~~can re~~ view~~ed~~ the underlying data in a secure setting and appealed any discrepancies. ~~Once~~ Now that this appeal process is completed, Idaho ~~will~~ is providing produce a comprehensive star rating list for the U.S. Department of Education.

2.C.iii Describe how the SEA will publicly recognize and, if possible, reward highest-performing and high-progress schools.

Five--Star Schools will be announced at the same time the ISDE announces sStatewide accountability results for all schools (typically August annually). Members of the Idaho State Board of Education will publicly recognize Five--Star Schools in a schoolwide assembly in September or October of each year. Five--Star Schools will receive public recognition in three ways:

- o Statewide announcement in August/September;
- o Schoolwide assembly in September/October; and
- o Symbol of recognition, such as a flag flow outside their school or a plaque to be hung at the school.

In addition, staff in Five--Star Schools will receive financial rewards (Title I funds will not be awarded to non-Title I schools). Idaho has implemented a sStatewide pay-for-performance plan for certificated staff at school buildings. One way in which staff can earn pay-for-performance bonuses is if entire schools reach specific achievement or normative growth goals. Staff in Five--Star Schools will participate in these financial rewards since they will be identified as the Hhighest-Pperforming and Hhigh-Pprogress schools statewide.

In refining the awards system, ISDE consulted extensively with members of the Idaho State Board of Education, representatives of the community, and representative of dDistricts in focus groups in determining the key ways in which to recognize schools and districts.

## 2.D PRIORITY SCHOOLS

2.D.i Describe the SEA's methodology for identifying a number of lowest-performing schools equal to at least five percent of the State's Title I schools as priority schools.

*Did the SEA describe its methodology for identifying a number of lowest-performing schools equal to at least five percent of the State's Title I schools as priority schools?*

Priority Schools are identified as those schools that receive a One--Star rating as described in Section 2.A.i based on the achievement of the all students group, the growth to achievement of all students, the growth to achievement of the identified subgroups and, if a high school, through the post-secondary and career readiness measures. Through this comprehensive measure of student achievement, student growth, growth to standards, growth by students in subgroups, and how well schools are preparing students for postsecondary and career



readiness, a more accurate picture is presented regarding schools that are the lowest-performing schools in Idaho. A One-Star rating does meet the ESEA Flexibility definition of “priority school,” which is a school that, based on the most recent data available, has been identified as among the lowest-performing schools in the State. The total number of One-Star Schools in Idaho for 2012-2013 includes 5.04% or 21 of the 417 Title I schools in the State. The total number of One-Star schools identified in the preliminary data equals 5.29% of the Title I schools in Idaho and includes 29 schools. All schools designated as priority schools in Table 2 are priority schools for purposes of this request and must implement the interventions required of One-Star schools, regardless of their star rating. Across this request, all references to and requirements of One-Star schools apply to all schools designated as priority schools in Table 2 as well.

One-Star schools meet the definition of a priority school as found under the Peer Review Guidance. The One-Star schools, although based on a multitude of measures rather than just achievement, include the same lowest five percent of Title I schools in terms of all student proficiency, all Title I or Title I eligible school with a graduation rate of less than 60%, and the Tier I and Tier II schools currently using SIG funds to implement school intervention models with very few exceptions. For 2010-11, only two high schools have a one-year < 60% graduation rate < 60% two years in a row. Both of these schools are classified as a One-Star school and, therefore, will implement the sanctions outlined for One-Star schools. Idaho's graduation rate is lagged; therefore, 2010-2011 data is most the most current data and the data being used in the 2011-2012 star rating system. Of the five high schools that have graduation rates < 60%, only one is not identified as a One Star school. That school is, however, rated as a Two Star school. There were ~~8~~ eight schools that received SIG funds. Of those ~~eight~~ eight, two are identified as One Star, ~~one two~~ one as a Two Star, ~~three two~~ two as Three Star, ~~and one two~~ one as a Four Star ~~and one as a Five Star~~ school. Given that the interventions implemented by the SIG have been in place for two years now, improvement by these schools should be expected. Further, these measures ensure that the improvement is illustrated through a continuous growth rather than just achieving the benchmark for one year. All current SIG schools are also identified as priority schools for based on 2011-2012 data regardless of their star rating.

2.D.ii Provide the SEA's list of priority schools in Table 2.

*Does the SEA's request include a list of its priority schools? (Table 2)*

As noted in 2.C.ii, Idaho has produced a list of star ratings for all schools. The aggregate data for that preliminary designation is included in Table 2. A de-identified preliminary list of all the Title I schools for 2011-2012, their priority, focus, and reward status schools -categories are provided in Table 2. In spring-summer 2012, Idaho will provide an appeal process, in the same format as the current Adequate Yearly Progress (AYP) appeals, whereby districts can re-viewed the underlying data in a secure setting and appeals appealed any discrepancies. Once-Now that this appeal process is completed, Idaho will has produced a list of all One Star schools for the U.S. Department of Education. The total number of One Star Schools in Idaho for 2012-2013 includes 5.04% or 21 of the 417 Title I schools in the State. The preliminary identification in



~~2010-2011 has listed 5.29% of Title I schools as One Star schools. Five percent or 21 Title I schools have been identified as priority schools for the purposes of this waiver regardless of their star rating.~~

a. Did the SEA identify a number of priority schools equal to at least five percent of its Title I schools?

As noted in 2.C.ii, Idaho has produced a list of star ratings for all schools. The aggregate data for that ~~preliminary~~ designation is included in Table 2. ~~A de-identified preliminary list of all the Title I schools for 2011-2012, their priority, focus, and reward status categories schools are provided in Table 2.~~ In ~~spring-summer~~ 2012, Idaho ~~will~~ provided an appeal process, in the same format as the current Adequate Yearly Progress (AYP) appeals, whereby districts ~~can~~ reviewed the underlying data in a secure setting and ~~appeals~~ appealed any discrepancies. ~~Once~~ Now that this appeal process is completed, Idaho ~~will~~ has produced a list of all One Star schools for the U.S. Department of Education. ~~The total number of One Star Schools in Idaho for 2011-2012 includes 5.04% or 21 of the 417 Title I schools in the State. The preliminary identification in 2010-2011 has listed 5.29% of Title I schools as One Star schools. Five percent or 21 Title I schools have been identified as priority schools for the purposes of this waiver regardless of their star rating.~~

b. Did the SEA's methodology result in the identification of priority schools that are —

- (i) among the lowest five percent of Title I schools in the State based on the achievement of the "all students" group in terms of proficiency on the statewide assessments that are part of the SEA's differentiated recognition, accountability, and support system, combined, and have demonstrated a lack of progress on those assessments over a number of years in the "all students" group;
- (ii) Title I-participating or Title I-eligible high schools with a graduation rate less than 60 percent over a number of years; or
- (iii) Tier I or Tier II schools under the School Improvement Grants (SIG) program that are using SIG funds to fully implement a school intervention model?

The ~~S~~state has verified this ~~through in the following~~ five steps ~~and will again review the ratings once the data has been appealed in the following steps:~~ 1) a list ~~will be~~ was created providing Star Ratings for the schools on the next generation accountability system metric described in Section 2.A.i.; ~~2) the Star Rating list will be compared to a rank ordered list of Title I schools by the all student proficiency on ISAT reading and mathematics;~~ 3) the Star Rating list will be compared to a rank ordered list of Title I and Title I eligible schools' graduation rates ~~<60%~~; ~~4) the Star Rating list will be compared to the current Tier I and Tier II schools utilizing School Improvement Grant funds to implement a school intervention model;~~ ~~5) the Star Rating list was compared to a rank ordered list of Title I schools with a <60% graduation rates;~~ 4) the Star Rating list was compared to a rank ordered list of Title I schools by the all students proficiency



on ISAT reading and mathematics; 5) a cumulative chart ~~will be~~<sup>was</sup> created to illustrate any differences in the Star Rating list with the comparison lists.

As would be expected with different metrics, there are slight differences in the lists as outlined above.

2.D.iii Describe the meaningful interventions aligned with the turnaround principles that an LEA with priority schools will implement.

*Are the interventions that the SEA described aligned with the turnaround principles and are they likely to result in dramatic, systemic change in priority schools?*

The interventions Idaho plans to use are aligned to the Turnaround Principles defined in ESEA Flexibility. Each intervention is designed to improve the academic achievement of students in Idaho's One-Star Schools and will be selected based on input from families and community members. Idaho aligned its interventions to the Turnaround Principles, as defined in the ESEA Flexibility guidance.

a. Do the SEA's interventions include all of the following?

Every One-Star School is required to write a Turnaround Plan, with the assistance of the State and a turnaround coach. The school's ~~d~~District and the State are responsible for making sure the school implements the Turnaround Plan effectively. If the plan is found not to be effective during the turnaround process, the One-Star School must work with its ~~d~~District and State to make changes accordingly.

Before the One-Star School writes a Turnaround Plan, the State conducts an Instructional Core Focus Visit. Staff from the ~~ISDE Idaho State Department of Education (ISDE)~~ visits the school and its ~~d~~District to collect evidence of practice. This evidence shapes the Turnaround Plan.

Before the One-Star School or ~~d~~District creates its Turnaround Plan, the ~~d~~District must choose one of the permissible Turnaround Models. The following are the Turnaround Model options:

- **Transformation model**, which addresses areas critical to transforming persistently low-achieving schools. These areas include: developing teacher and principal leader effectiveness (depending on the track record of the principal, this could mean replacing the current administrator), implementing comprehensive instructional reform strategies, extending learning time and creating community connections, and providing operating flexibility and sustained support.
- **Turnaround model**, which includes, among other actions, replacing the principal and rehiring up to 50% of the school's staff, adopting a new governance structure, and implementing an instructional program that is research-based and vertically aligned from one grade to the next as well as aligned with the State's academic standards.



A turnaround model may also implement other strategies such as any of the required and permissible activities under the transformation model or a new school model (e.g., themed, dual language academy).

- **Restart model**, in which a district converts the district public school to a charter school or closes and reopens it under the management of an education management organization (EMO) that has been selected through a rigorous review process. Such a school is still entirely accountable to the local school board for the results it produces.
- **School closure**, in which the district closes the school and enrolls the students who attended the school in other higher-achieving schools in the district.
- **Governance Partnership Model**, in which the district partners with an external entity to implement the Turnaround Principles and transform the governance of the school. This may include:
  - Agreeing to utilize services provided directly to the district by the Sstate in lieu of a Sstate takeover in which a diagnostic review is conducted and services are tailored specifically to the context of the school and district;
  - Purchasing the services of a lead turnaround partner that will utilize research-based strategies, that has a proven record of success with similar schools, and which shall be a key participant and decision-maker in all aspects of developing and collaborative executing the turnaround plan;
- **Special Rule for District Charter Schools:** For a district charter school, renegotiate and significantly restructure the school's charter pending approval by the State-Idaho Public Charter School Commission in order to implement the Turnaround Principles or revoke the charter and close the district charter school.

After choosing a Turnaround Model, the One--Star School and its dDistrict develop a Turnaround Plan. The Turnaround Plan provides the framework for analyzing problems, identifying underlying causes and addressing instructional issues in the school and district that have led to persistently low student achievement outcomes.

The plan must incorporate strategies based on scientifically based research that will strengthen the core academic subjects in the school and address the specific academic issues that caused the school to be identified for the Turnaround Plan category.

The One--Star School must use the State's WISE Tool to write its Turnaround Plan. The WISE (Ways to Improve School Effectiveness) Tool is a web-based system for school improvement planning. The WISE Tool is made up of 88 indicators. Each indicator is tied to research on how to effectively improve student achievement for all students, including English language learners, students with disabilities and low-achieving students.

In addition to requirements the One--Star School must implement through its Turnaround Plan, the State also places requirements on districts ~~Districts~~ in which a One--Star School is identified.



The ~~district~~ ~~District~~ must use the WISE Tool for district improvement planning and begin implementing research-based strategies in its lowest-performing schools. Strategies may include addressing governance and staffing. Through this planning process, the State makes sure the ~~district~~ ~~District~~ is responsible for the success of the One Star School and every school within the ~~district~~. ~~District~~.

The Turnaround Principles, as defined in the ESEA Flexibility guidance, are embedded in the WISE Tool indicators. During the local and state review of the Turnaround Plan in the WISE Tool, the rubric will provide a score for the plans created for each separate Turnaround Principle. Here are the ways in which improvement efforts for One-~~Star~~ Schools are aligned to the Turnaround Principles:

*(i) providing strong leadership by: (1) reviewing the performance of the current principal; (2) either replacing the principal if such a change is necessary to ensure strong and effective leadership, or demonstrating to the SEA that the current principal has a track record in improving achievement and has the ability to lead the turnaround effort; and (3) providing the principal with operational flexibility in the areas of scheduling, staff, curriculum, and budget;*

- 1- The One-~~Star~~ School must evaluate the performance of the current principal when it selects a Turnaround Model. The State conducts an Instructional Core Focus Visit to evaluate current practices in the school and in the District.

The Focus Visit includes an analysis of the current leadership at the school level and recommendations are made to the district leadership regarding the performance of the principal. The district must then take the recommendations of the State into account.

- 2- If the district chooses to retain the principal, it must describe its evidence and rationale for doing so in the Transformation Toolkit indicators related to school leadership.

- 3- Under the WISE Tool, One-~~Star~~ Schools must develop a leadership team structure that addresses school governance policies and incorporates the school improvement plan into these policies. If necessary, the school should address the principal's flexibility in the areas of scheduling, staff, curriculum and budget. Teachers in the school as well as the ~~d~~District and State must be involved in the development of the plan.

*(ii) ensuring that teachers are effective and able to improve instruction by: (1) reviewing the quality of all staff and retaining only those who are determined to be effective and have the ability to be successful in the turnaround effort; (2) preventing ineffective teachers from transferring to these schools; and (3) providing job-embedded, ongoing professional development informed by the teacher evaluation and support systems and tied to teacher and student needs;*



- 1- The One-Star School must evaluate the performance of all staff when it selects a Turnaround Model. The State conducts an Instructional Core Focus Visit to evaluate current practices in the school and in the District. The Focus Visit includes an analysis of the current school staff and quality of instruction in the school.
- 2- In 2011, the State passed a law giving building principals more authority over the staff who work in their school. Under Idaho Code 33-523, principals can refuse the transfer or hire of a teacher in their school. In this way, the instructional leader of the school is empowered to prevent ineffective teachers from transferring into a One-Star School.
- 3- Through the school improvement planning process in the WISE Tool, One-Star Schools are required to plan for professional development based on the needs of the students in the school and the school staff. The plan must account for the relationship between classroom observations and professional development needs that targets specific areas of student performance.

The plan must include job-embedded, ongoing professional development opportunities based on the school's evaluation and performance data. One-Star Schools are required to set aside 10% of Title I funds to support professional development activities for staff.

*(iii) redesigning the school day, week, or year to include additional time for student learning and teacher collaboration;*

Through the WISE Tool, a One-Star School is required to address the school schedule and additional time for student learning and teacher collaboration in its school improvement plan. Here are examples of specific indicators that schools may use to address these matters:

- Instructional Teams meet for blocks of time (4 to 6 hour blocks, once a month; whole days before and after the school year) sufficient to develop and refine units of instruction and review student learning data.
- The principal plans opportunities for teachers to share their strengths with other teachers.
- Teachers individualize instruction based on pre-test results to provide support for some students and enhanced learning opportunities for others.
- The principal spends at least 50% of his/her time working directly with teachers to improve instruction, including classroom observations.

*(iv) strengthening the school's instructional program based on student needs and ensuring that the instructional program is research-based, rigorous, and aligned with State academic content standards;*



The most important factor in turning around the One-Star School is improving the quality of instruction to ensure the school is meeting the needs of every student, including English language learners, students with disabilities and low-achieving students. Through the WISE Tool, a One-Star School is required to strengthen the school's instructional program so it meets students' needs, is based on research and aligned to Idaho's content standards which now include the Common Core State Standards.

Here are examples of some of the indicators in the WISE Tool. Every indicator in the WISE Tool is tied to research. See <http://www.indistar.org/about/brochure/indistarbrochure.pdf>.

- Objectives are leveled to target learning to each student's demonstrated prior mastery based on multiple points of data (i.e., unit tests and student work).
- Instructional Teams develop standards-aligned units of instruction for each subject and grade level.
- Units of instruction include standards-based objectives and criteria for mastery.
- The principal keeps a focus on instructional improvement and student learning outcomes.

(v) *using data to inform instruction and for continuous improvement, including by providing time for collaboration on the use of data;*

Through the WISE Tool, a One-Star School is required to use describe its plans and implementation efforts in the use of data to inform instruction for continuous improvement. Here are a few examples of indicators in the WISE Tool that require the use of data to inform instruction and time for teachers and staff to collaborate on the use of data:

- The school's Leadership Team regularly looks at school performance data and aggregated classroom observation data to make decisions about school improvement and professional development needs.
- Yearly learning goals are set for the school by the Leadership Team, utilizing student learning data.
- Instructional Teams use student learning data to plan instruction.
- Units of instruction include pre-/post-tests to assess student mastery of standards-based objectives.
- Unit pre-tests and post-tests are administered to all students in the grade level and subject covered by the unit of instruction.
- Teachers individualize instruction based on pre-test results to provide support for some students and enhanced learning opportunities for others.
- Teachers re-teach based on post-test results.
- Instructional Teams meet for blocks of time (4 to 6 hour blocks, once a month; whole days before and after the school year) sufficient to develop and refine units of instruction and review student learning data.



- The principal plans opportunities for teachers to share their strengths with other teachers.

(vi) *establishing a school environment that improves school safety and discipline and addressing other non-academic factors that impact student achievement, such as students' social, emotional, and health needs; and*

Through the WISE Tool, a One--Star School is required to develop and implement a plan for a supportive learning environment that improves school safety and discipline and ensures teachers and staffs address students' social, emotional, and health needs. Here are some of the WISE Tool indicators that address these matters:

- All teachers verbally praise students.
- All teachers interact socially with students (noticing and attending to an ill student, asking about the weekend, inquiring about the family).
- Office and support staff are trained to make the school a 'welcoming place' for parents.
- All teachers display classroom rules and procedures in the classroom.
- All teachers correct students who do not follow classroom rules and procedures.
- All teachers reinforce classroom rules and procedures by positively teaching them.

(vii) *providing ongoing mechanisms for family and community engagement?*

One--Star Schools are expected to develop and implement plans that provide ways in which the family and community can engage in the school improvement process. Specifically, the WISE Tool includes the following indicators:

- The principal offers frequent opportunities for staff and parents to voice constructive critique of the school's progress and suggestions for improvement.
- All teachers maintain a file of communication with parents.
- All teachers systematically report to parents the student's mastery of specific standards-based objectives.

*American Indian Tribes - Special Provision:* For districts on or near tribal lands and with significant numbers of American Indian students enrolled in a One--Star School, the district must ensure it engages the tribe throughout the planning for the turnaround model and implementation process of the turnaround principles. ISDE will create a planning space within the WISE Tool that specifically allows the school and district to document the engagement of the local tribal community in addition to the existing planning indicators.

ISDE expects the school board to intentionally and formally seek input on policy and governance decisions regarding school turnaround and continuous support.



ISDE has a comprehensive process for ensuring alignment of the turnaround principles with the requirements expected of schools and districts. The seven turnaround principles are listed and numbered below for reference.

1. providing strong leadership by: (1) reviewing the performance of the current principal; (2) either replacing the principal if such a change is necessary to ensure strong and effective leadership, or demonstrating to the SEA that the current principal has a track record in improving achievement and has the ability to lead the turnaround effort; and (3) providing the principal with operational flexibility in the areas of scheduling, staff, curriculum, and budget;
2. ensuring that teachers are effective and able to improve instruction by: (1) reviewing the quality of all staff and retaining only those who are determined to be effective and have the ability to be successful in the turnaround effort; (2) preventing ineffective teachers from transferring to these schools; and (3) providing job-embedded, ongoing professional development informed by the teacher evaluation and support systems and tied to teacher and student needs;
3. redesigning the school day, week, or year to include additional time for student learning and teacher collaboration;
4. strengthening the school's instructional program based on student needs and ensuring that the instructional program is research-based, rigorous, and aligned with State academic content standards;
5. using data to inform instruction and for continuous improvement, including by providing time for collaboration on the use of data;
6. establishing a school environment that improves school safety and discipline and addressing other non-academic factors that impact student achievement, such as students' social, emotional, and health needs; and
7. providing ongoing mechanisms for family and community engagement.

**District:**

As described in the plan, priority schools and their districts will be required to create and implement a turnaround plan that is connected with the diagnostic review that occurs during the Instructional Core Focus Visit, and which the district must oversee and approve prior to State review. To clarify the alignment process, the following draft elements are being provided. First, the basic WISE Tool plan includes many indicators at the LEA and school level. These are organized by cluster. The district has three main clusters in which planning already occurs:

- A. District Context and Support for School Improvement - Improving the school within the framework of district support
- B. District Context and Support for School Improvement - Taking the change



process into account

C. District Context and Support for School Improvement - Clarifying district-school expectations

When a district has a school that is required to implement a turnaround plan (i.e., priority schools), the district must also plan for the following cluster of indicators:

D. District Turnaround Plan Support

This fourth cluster requires districts to create plans (i.e., objectives and tasks) and monitor implementation for the turnaround principles using the following indicators:

<u>Draft LEA Turnaround Plan Indicators</u>	<u>Turnaround Principle #</u>
<u>For each school in the turnaround plan category, the district ensures that the chosen Turnaround Model option (e.g., transformation model, Restart, etc.) reflects the particular strengths and weaknesses of the school.</u>	<u>n/a</u>
<u>The LEA examines its policies and makes modifications as needed to provide operational flexibility for principals in order to support school turnaround plans in key areas (e.g., scheduling, staff, curriculum, and budget).</u>	<u>1</u>
<u>The LEA reviews the capacity of principals in schools required to implement turnaround plans and determines whether an existing principal has the necessary competencies to lead the turnaround effort (e.g., based on his/her track record or leadership capacity) or whether the principal needs to be replaced with a stronger, more effective leader.</u>	<u>1</u>
<u>The LEA ensures that a school leadership team made up of the principal and diverse staff representatives is in place to make decisions of substance in schools required to implement turnaround plans.</u>	<u>1</u>
<u>Draft LEA Turnaround Plan Indicators</u>	<u>Turnaround Principle #</u>
<u>For schools required to implement turnaround plans, the LEA aligns professional development with identified needs as based upon staff evaluation results, student performance, and other pertinent sources of data.</u>	<u>2</u>
<u>The LEA reviews the quality of all staff members in schools required to implement turnaround plans and retains only those who have the ability to support the turnaround plan.</u>	<u>2</u>



<u>The LEA has policies and practices in place that prevent ineffective teachers from transferring to schools that are required to implement turnaround plans.</u>	<u>2</u>
<u>The LEA allocates resources (e.g., financial and human capital) to support extended learning time in schools required to submit turnaround plans.</u>	<u>3</u>

These district indicators directly align to turnaround principles 1, 2, and 3 and are in addition to planning in the general indicators of the WISE Tool in order to ensure that all turnaround principles are specifically addressed.

**School:**

At the school level, the basic WISE Tool has four clusters of indicators. They are:

- A. School Leadership and Decision Making
- B. Curriculum, Assessment, and Instructional Planning
- C. Classroom Instruction
- D. School Community

In addition to planning in the basic set of indicators, schools that must implement a turnaround plan (i.e., priority schools) must create plans (i.e., objectives and tasks) and monitor implementation for the turnaround principles using the following indicators:

<b><u>Draft School Turnaround Plan Indicators</u></b>	<b><u>Turnaround Principle #</u></b>
<u>The principal reviews the quality of all staff members in schools required to implement turnaround plans and retains only those who have the ability to support the turnaround plan.</u>	<u>2</u>
<u>The school leadership team ensures that job-embedded, ongoing professional development is provided to teachers, which is informed by the teacher evaluation and support system and is tied to teacher and student needs.</u>	<u>2</u>
<b><u>Draft LEA Turnaround Plan Indicators</u></b>	<b><u>Turnaround Principle #</u></b>
<u>The school leadership team evaluates the school schedule yearly and redesigns the schedule to include time for extended learning opportunities for students.</u>	<u>3</u>
<u>The school leadership team evaluates the school schedule yearly and redesigns the schedule to include sufficient time for teacher collaboration.</u>	<u>3</u>



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<u>The school has established a team structure for collaboration among all teachers with specific duties and time for instructional planning.</u>	<u>3</u>
<u>The school leadership team ensures that the core instructional program is research-based, rigorous, and aligned with State academic content standards.</u>	<u>4</u>
<u>The school leadership team regularly monitors and makes adjustments to continuously improve the core instructional program based on identified student needs.</u>	<u>4</u>
<u>The school leadership team and staff collaboration teams have a plan for using data to inform decisions about the instructional core and continuous, system-wide improvement.</u>	<u>5</u>
<u>The school leadership team ensures that the school environment is safe and supportive (i.e., it addresses non-academic factors, such as social and emotional well-being).</u>	<u>6</u>
<u>The school leadership team provides ongoing mechanisms for families and the community to be meaningfully engaged in decisions that impact school improvement and the school environment.</u>	<u>7</u>

The indicators included in the turnaround plan will reflect the turnaround principles and will be planned for at the school and district level. School plans will be reviewed for quality by district leadership. District plans will be reviewed for quality by the Statewide System of Support team. The review process will use a rubric to score the quality of the objectives, tasks, and monitoring of implementation. A rubric in draft form is attached (Attachment 29).

*b. Has the SEA identified practices to be implemented that meet the turnaround principles and are likely to —*

*(i) increase the quality of instruction in priority schools;*

Every One--Star School must submit a Turnaround Plan to the LEA and the State using the WISE Tool, a web-based school improvement planning tool. The indicators in the WISE Tool are aimed at improving student achievement through creating higher-quality instruction. Each indicator is tied to research-based practice.



*(ii) improve the effectiveness of the leadership and the teaching in these schools; and*

The One-~~2~~-Star School will improve the effectiveness of leadership and teaching by creating and implementing a Turnaround Plan and through one-on-one support from the State. The WISE Tool provides detailed steps that every One-~~2~~-Star School will take to improve leadership and the quality of teaching through its Turnaround Plan.

Specific indicators in the WISE Tool emphasize behavioral research regarding what effective principals must do to effect change in a school, including developing a leadership team and using data to guide instruction.

These indicators are then connected to the use of the Danielson Framework for Teaching as an evaluation tool and the analysis of student achievement data to make sure the school is getting results.

The State also puts support structures in place to customize support for each One-~~2~~-Star School and the LEA that oversees it. The Idaho Building Capacity Project provides an external coach to a school and its district. The ~~Idaho State Department of Education~~ ISDE selects coaches, or Capacity Builders, from a pool of retired school administrators who have demonstrated excellence in instructional leadership in the past. The Capacity Builder works with the leader and leadership team in a school and at the district level to prompt thinking, instill internal knowledge and skills, and assist the school and the district as they evaluate the effectiveness of school improvement efforts. With this one-on-one support, the State is responsive to the One-~~2~~-Star School's needs and makes sure the ~~s~~School is effectively implementing its Turnaround Plan.

*(iii) improve student achievement and, where applicable, graduation rates for all students, including English Learners, students with disabilities, and the lowest-achieving students?*

The indicators that One-~~2~~-Star Schools must use in their Turnaround Plans are tied to research-based practices that have been proven to raise achievement for all students, including English Learners, students with disabilities, and the lowest-achieving students. Through the indicators, teachers must use data to guide and individualize instruction to meet student needs. The principal, as the instructional leader, is responsible for evaluating the classroom teacher and student achievement data to make sure goals are met for all students. The State must approve the school's Turnaround Plan and will remain involved in monitoring student progress.

c. *Has the SEA indicated that it will ensure that each of its priority schools implements the selected intervention for at least three years?*



Once identified, a school will remain a One-Star School (i.e., a priority school in the Turnaround Plan status) for at least three years, unless it meets the exit criteria defined in Section 2.D.v. During that period, plans will be overseen by the ~~d~~District, approved by the State and monitored by both the State and the ~~d~~District. Schools may exit from the State requirements (i.e., plan approval, Focus Visits, Title I set-asides, STSextended learning time and ChoiceChoice notification of enrollment options) of priority status one year early if they meet the exit criteria of two consecutive years at a Three-Star rating or higher (after initial identification); however, they must continue to implement the turnaround principles identified in the school and district plan for a minimum of three years. If a priority school continues in this status for more than three years, the State will intervene as necessary in district leadership functions in order to ensure the school is turned around. Table 33 depicts the entrance and exit process and the sequence of years related to the One-Star school's Turnaround Plan requirements.

2.D.iv Provide the timeline the SEA will use to ensure that its LEAs that have one or more priority schools implement meaningful interventions aligned with the turnaround principles in each priority school no later than the 2014–2015 school year and provide a justification for the SEA's choice of timeline.



Plan Timeline & When the Status Takes Effect	School Requirements	LEA Requirements
School year prior to the school year during which the first One- <del>Star</del> rating is earned	<i>Depends on Star Rating Level</i>	<i>Depends on Star Rating Level</i>
Turnaround Plan - Year 1  <u>The year following the second first One-Star rating for those schools identified as Priority Schools in Table 2</u>          <u>The year following the second One-Star rating for all other schools</u>	<u>Fall 2012</u>  Participate in Instructional Core Focus Visit  <u>Begin notifying parents of enrollment options</u>  <u>Begin providing extended learning time</u>  <u>Winter 2012/Spring 2013</u>  Create school level Turnaround Plan aligned with turnaround principles and other state requirements	<u>Fall 2012</u>  Participate in Instructional Core Focus Visit  Enroll district and school in appropriate technical assistance programs  Choose school Turnaround Option  Create district level plan for school turnaround principles  <u>Winter 2012/Spring 2013</u>  Oversee the development of school level Turnaround Plan  Review school level Turnaround Plan for approval before submission to the State

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Plan Timeline & When the Status Takes Effect	School Requirements	LEA Requirements
<a href="#">Turnaround Plan - Year 1</a>  <a href="#">The year following the second One-Star rating for all other schools</a>	<a href="#">Fall 2013 and beyond</a> <a href="#">Participate in Instructional Core Focus Visit</a> <del>Begin n</del> <a href="#">Notifying</a> parents of enrollment options <del>Begin p</del> <a href="#">Provide</a> ing extended learning time <a href="#">Winter 2013/Spring 2014 and beyond</a> <a href="#">Create school level Turnaround Plan aligned with turnaround principles and other state requirements</a>	<a href="#">Fall 2013 and beyond</a> <a href="#">Participate in Instructional Core Focus Visit</a> <a href="#">Enroll district and school in appropriate technical assistance programs</a> <a href="#">Choose school Turnaround Option</a> <a href="#">Create district level plan for school turnaround principles</a> <a href="#">Winter 2013/Spring 2014 and beyond</a> <a href="#">Oversee the development of school level Turnaround Plan</a> <a href="#">Review school level Turnaround Plan for approval before submission to the State</a>
Turnaround Plan - Year 2  <i>Consecutive year after "Turnaround Plan – Year 1"</i>	Full implementation of school level Turnaround Plan aligned with turnaround principles and other state requirements  Submit updates and revisions to Turnaround Plan	Provide continuous support and monitoring of school level Turnaround Plan aligned with turnaround principles and other state requirements  Review updates and revisions to school level Turnaround Plan for approval before re-submission to the State
Turnaround Plan - Year 3  <i>Consecutive year after "Turnaround Plan - Year 2", <u>unless</u> the exit criteria is met.</i>	Turnaround Plan - Year 3 (Continuing) Continue full implementation of school level Turnaround Plan aligned with turnaround principles and other state requirements  Submit updates and revisions to Turnaround Plan	Provide continuous support and monitoring of school level Turnaround Plan aligned with turnaround principles and other state requirements  Review updates and revisions to school level Turnaround Plan for approval before re-submission to the State



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Plan Timeline & When the Status Takes Effect	School Requirements	LEA Requirements
Turnaround Plan - Year 3  <i>Consecutive year after "Turnaround Plan - Year 2", <u>unless</u> the exit criteria is met.</i>	Turnaround Plan - Year 3 (Exited) <i>If a Three--Star rating or higher has been reached in both Turnaround Plan – Years 1 and 2, the school may exit the Turnaround Plan State requirements (see above) one year early, but must continue to implement the turnaround principles included in the school and district plan for Turnaround Plan Year 3.</i>	Monitor continued implementation of turnaround principles in the school and provide continuous support.
Turnaround Plan - Year 4  <i>Consecutive year after "Turnaround Plan - Year 3"</i>	n/a	If a school has not met the exit criteria of two consecutive years at Three--Star rating or higher by the end of Turnaround Plan – Year 3, the State will intervene as appropriate with district governance according to the district context and leadership capacity at the central office and school board

*2.D.iv. Is the SEA's proposed timeline for ensuring that LEAs that have one or more priority schools implement meaningful interventions aligned with the turnaround principles in each priority school no later than the 2014-2015 school year reasonable and likely to result in implementation of the interventions in these schools?*

Idaho's proposed timeline for ensuring that ~~d~~Districts that have one or more priority schools implement meaningful interventions aligned with the turnaround principles in each priority school no later than the 2014-2015 school year is reasonable and is likely to result in implementation of the interventions in these schools.

The ~~S~~state will ensure that ~~d~~Districts implement meaningful interventions in One--Star Schools (i.e., a Priority School) over the course of a graduated process to occur no later than 2014-2015. Because of the emphasis on district responsibility and capacity, the timeline articulates the actions that the state will take to inform districts regarding the identification of their schools. Then, the timeline allows the ~~S~~state sufficient time to conduct the Instructional Core Focus Visits that will be required to make determinations about leadership capacity and develop recommendations for local planning.



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After the recommendations from the Instructional Core Focus Visits, the timeline allows districts sufficient time to plan for district requirements, consult with families and the community, and to make important decisions regarding school governance. Once the district has completed the actions required of it, the timeline details the particulars required for school level planning.

- *Does the SEA's proposed timeline distribute priority schools' implementation of meaningful interventions aligned with the turnaround principles in a balanced way, such that there is not a concentration of these schools in the later years of the timeline?*

As detailed in Table 34, the timeline targets state, district, and school activities that will occur in order that the Turnaround Principles will be implemented in schools by 2014-2015; implementation efforts will continue in 2015 and beyond. The timeline does not distribute schools differentially or save all aspects of implementation for the latter years of the timeline. All schools identified will follow ~~this timeline~~ the timeline on Table 34.

**Table 34**  
**Turn Around Principles Timeline**

Timeframe	Agency	Action
Spring 2012 – Spring 2014	SEA	Continue implementing school turnaround models in persistently low-achieving schools identified under the School Improvement Grant 1003(g) requirements; monitor implementation; support district and school turnaround efforts through technical assistance and various programs
Spring 2012	SEA	Identify first year of schools achieving One Star according to new performance framework; notify districts of school ratings
Fall 2012	SEA	Conduct statewide training on requirements for new accountability system and transitional elements; provide guidance to Districts regarding the requirements and Turnaround Principles that are expected to be implemented in schools which are in the Turnaround Plan category
School Year 2012 – 2013	SEA	Continue implementation of existing NCLB accountability requirements for all schools until Star Rating system takes full effect <u>All schools identified as Priority Schools in Table 2 based off of data from the 2011-2012 school year are Priority Schools for the purpose of this waiver request and must begin implementing all requirements of One-Star schools starting in the 2012-2013 school year regardless of their Star Rating as outlined in Table 33.</u>
Summer 2013	SEA	<del>For all other schools not identified as Priority</del> <u>Priority Schools in Table 2,</u> <del>Notify d</del> <u>Notify Districts of schools within their districts that are identified in the Turnaround Plan category (i.e., a Priority School) based on two years of One-Star Ranking</u> <del>Rating</del>
Fall 2013	SEA	<u>For all other schools not identified as Priority Schools in Table 2,</u> <del>C</del> conduct Instructional Core Focus Visits in Turnaround Plan schools; provide recommendations to districts regarding school and district leadership



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		capacity, instructional practices, and governance structures
Fall 2013	LEA	<a href="#">For all other schools not identified as Priority Schools in Table 2, B</a> egin providing required services for eligible students in each Turnaround Plan and Rapid Improvement Plan school (e.g., <a href="#">notification of enrollment options</a> <del>School Choice, Supplemental Tutoring Services</del> <a href="#">extended learning time</a> ) and enroll in appropriate <del>S</del> state-sponsored technical assistance programs for the district and school
Fall 2013	LEA	<a href="#">For all other schools not identified as Priority Schools in Table 2, U</a> tilize state feedback from Instructional Core Focus Visit; consult with families and the community to gather input regarding School Turnaround Options; decide which School Turnaround Option the district will utilize for each Turnaround Plan school; and begin the district level planning and implementation work required of the school Turnaround Plan.
Winter 2014	SEA	<a href="#">For all other schools not identified as Priority Schools in Table 2, R</a> review district level planning components and selection of School Turnaround Option for state approval
Spring 2014	LEA and School	<a href="#">For all other schools not identified as Priority Schools in Table 2, D</a> evelop school level Turnaround Plan components that account for the Turnaround Principles and any other state required activities
Spring 2014	SEA	<a href="#">For all other schools not identified as Priority Schools in Table 2, R</a> review school level planning components of the Turnaround Plan for <del>S</del> state approval
Fall 2014 – Spring 2015	SEA, LEA, & School	<a href="#">For all other schools not identified as Priority Schools in Table 2, F</a> ull implementation of school level Turnaround Principles in schools that are in the Turnaround Plan category; continuous monitoring, collaboration, and support between school, <del>d</del> District, and SEA
Spring 2015 & beyond	SEA	<a href="#">For all other schools not identified as Priority Schools in Table 2, M</a> onitor and support implementation of the Turnaround Principles throughout the duration of the period for which the school is identified in the Turnaround Plan category; if the school does not exit from the Turnaround Plan category, make a determination regarding <del>S</del> state intervention at the district level

2.D.v Provide the criteria the SEA will use to determine when a school that is making significant progress in improving student achievement exits priority status and a justification for the criteria selected.

*Did the SEA provide criteria to determine when a school that is making significant progress in improving student achievement exits priority status?*

a. Do the SEA's criteria ensure that schools that exit priority status have made significant progress in improving student achievement?

The exit criteria ensure One–Star Schools have made significant progress. One–Star Schools will remain under the requirements of the Turnaround Plan, once identified, for at least three years in order to fully implement the Turnaround Principles and meaningful interventions, unless they meet the exit criteria. The state has set criteria



for removing a school from the One-Star School category (i.e., priority status) once it has made significant progress. The method the State will use to determine if a school or district has met its annual measurable objectives results is a rating scale of one to five stars. This annual rating includes absolute achievement and student growth. In order to be removed from One-Star School status, a school must achieve a three-star ranking or better for two consecutive years after initial identification.

The exit criteria are based upon two consecutive years of performance in the Star Rating performance framework. The performance framework is comprised of a comprehensive set of metrics (student achievement, student academic growth, secondary opportunities, graduation, etc.). In order to move to a new level (i.e., a higher Star Rating), the school must attain higher scores across multiple measures. Thus, if a school is able to improve its performance and sustain it for two years in a row, it has demonstrated significant progress from its initial identification as one of the lowest-performing schools in the State. The State chose two consecutive years at a Three-Star Rating or better, because Four- and Five-Star schools are high performing and a Three-Star rating places the school in the typical domain of “continuous improvement” where the majority of schools will be working will LEA oversight. A Three-Star school has demonstrated it does not have the intense need for intervention based upon its performance.

Schools identified as Priority Schools in Table 2 based off of data from the 2011-2012 school year must implement all requirements of One-Star schools starting in the 2012-2013 school year regardless of their Star Rating. To exit this Priority Status, they must implement the interventions for a minimum of three years and must obtain a Star Rating of a 3 Star or higher.

➤ *Is the level of progress required by the criteria to exit priority status likely to result in sustained improvement in these schools?*

The level of progress required is likely to result in sustained improvement. The State has determined that the exit criteria of two consecutive years achieving a Three-Star ranking or better on the annual measurable objectives is likely to result in sustained improvement. First, this is due to the fact that the school has demonstrated evidence of achievement that is not simply a one year anomaly. Rather, minimum State benchmarks have been met and the system has sustained that level of performance over time.

Second, to achieve a Three-Star rating or better, the school must be demonstrating system-wide improvement in order to impact the multiple sub-domains on the performance framework. Because the exit criteria is based on all four dimensions of the accountability system, when a school receives a higher star rating, it illustrates that the school's performance has improved throughout and includes more than just students reaching proficiency. It includes all student and subgroup growth; growth to proficiency; and, for high schools, it also includes three measures of postsecondary and workforce readiness.



As mentioned in Table 33, if a school has not met the exit criteria by the end of the third year in priority status, the State will intervene as appropriate in district governance. If a school has not improved by that time, the district is considered to be responsible. The intervention with the district will include actions as described in Section 2.A.i.a – Part II within the context of the Instructional Core Focus Visit. The State will diagnose the level of need for a change in governance based on the process described in the Focus Visit and, along with data provided from the three years of planning that did not result in improvement, work with the district, the school board, or the community to make whatever changes are appropriate. The rationale for this theory of action is as follows. Idaho is a local control state. Therefore, while the framework of improvement is guided by State structures the vast majority of actual decisions are ultimately left in the hands of local school boards and district office leaders regarding school improvement, and the State has no authority to remove a school from a district or otherwise take it over. Similarly, the State has no authority to remove the district from the governing authority of the local board of trustees. Therefore, State actions within the context of priority schools must occur within the appropriate statutory constraints of the State's local control context. If the State has provided all of the technical assistance and support described in the ESEA Flexibility Plan and the school has still not met the criteria to exit from priority status after a period of three years, ISDE will consider the district leadership to have not ensured the implementation of sufficiently rigorous improvement efforts. Thus, recommendation for a change in governance at the district office will be made at the level deemed most appropriate based on the three years of data collected via the monitoring and support relationships developed with the district.



## 2.E FOCUS SCHOOLS

- 2.E.i Describe the SEA's methodology for identifying a number of low-performing schools equal to at least 10 percent of the State's Title I schools as "focus schools."

*Did the SEA describe its methodology for identifying a number of low-performing schools equal to at least 10 percent of the State's Title I schools as focus schools?*

Focus Schools will be identified as those Title I schools that receive a Two-Star rating as described in Section 2.A.i. Through this comprehensive measure of student achievement, student growth, growth to standards, growth by students in subgroups and how well schools are preparing students for postsecondary and career readiness, a more accurate picture is presented regarding schools that are among the lowest-performing in Idaho due to achievement gaps. A Two-Star rating does meet the ESEA definition of "focus school," which is a Title I school in the State that, based on most recent data available, is contributing to the achievement gap in the State. All schools designated as focus schools in Table 2 are focus schools for purposes of this request and must implement the interventions required of Two Star focus schools, regardless of their star rating. Across this request, all references to and requirements of Two Star schools apply to all schools designated as focus schools in Table 2.

The total number of Two Star Schools in Idaho for 2011-2012 includes 11.2% or 47 of the 417 Title I schools in the State. The total number of Two Star Schools in Idaho for the 2010-2011 preliminary data included 9.85% or 54 of the Title I schools in the State. Ten percent or 42 Title I schools in the State have been identified as focus schools for the purposes of this waiver regardless of their star rating.

Idaho has defined Two-Star schools as those that have low overall-subgroup achievement and have a notable proficiency gap for subgroups. This is measured through the growth to achievement and growth to achievement subgroups, as well as subgroup proficiency.

- 2.E.ii Provide the SEA's list of focus schools in Table 2.

*Did the SEA include a list of its focus schools? (Table 2)*

- a. *Did the SEA identify a number of focus schools equal to at least 10 percent of the State's Title I schools?*

As noted in 2.C.ii, Idaho has produced a list of star ratings for all schools. The aggregate data for that preliminary designation is included in Table 2. A de-identified preliminary list of all the Title I schools for 2011-2012, their priority, focus, and reward status categories schools are provided in Table 2. In spring-summer 2012, Idaho will provided an appeal process, in the same format as the current Adequate Yearly Progress (AYP) appeals, whereby districts can-reviewed the underlying data in a secure setting and appeals-appealed any discrepancies. Once-Now that this appeal process is completed, Idaho will-has produced a list of all Two Star schools for the U.S.



Department of Education. As noted in the aggregate in Table 2

The total number of Two Star Schools in Idaho for 2011-2012 includes 11.2% or 47 of the 417 Title I schools in the State. In the 2010-2011 preliminary data, 9.84% of Idaho schools are were preliminarily classified as Two Star schools. Ten percent or 42 Title I schools in the State have been identified as focus schools for the purposes of this waiver regardless of their star rating.

*b. In identifying focus schools, was the SEA's methodology based on the achievement and lack of progress over a number of years of one or more subgroups of students identified under ESEA section 1111(b)(2)(C)(v)(II) in terms of proficiency on the statewide assessments that are part of the SEA's differentiated recognition, accountability, and support system or, at the high school level, graduation rates for one or more subgroups?*

ISDE identified schools based on the total points awarded in the achievement category, the points awarded for growth to achievement and growth to achievement subgroups and for high schools, graduation rate, advanced opportunities and college entrance and placement exam preparedness. This point matrix created an overall rating for the school which then placed them on the rating scale.

*c. Did the SEA's methodology result in the identification of focus schools that have:*

*(i) the largest within-school gaps between the highest-achieving subgroup or subgroups and the lowest-achieving subgroup or subgroups or, at the high school level, the largest within-school gaps in the graduation rate; or*

*(ii) a subgroup or subgroups with low achievement or, at the high school level, a low graduation rate?*

~~ISDE focused on definition ii. The State SDE has~~ verified the subgroup performance ~~this through the following four seven~~ steps: 1) a list was created providing Star Ratings for the schools on the next generation accountability system metric described in Section 2.A.i.-; 2) the Star Rating list was compared to a rank ordered list of Title I schools' graduation rates; 3) the Star Rating list was compared to a rank ordered list of Title I schools by the size of the proficiency gaps ~~by between highest and lowest achieving all~~ subgroups in reading and mathematics; 4) the Star Rating list was compared to a rank ordered list of Title I schools by the lowest achieving subgroup proficiency on ISAT reading and mathematics; 5) the Star Rating list was compared to a rank ordered list of Title I schools by the size of the proficiency gaps between at-risk and not at-risk subgroups in reading and mathematics; 6) the Star Rating list was compared to a rank ordered list of Title I schools by the at-risk subgroup proficiency on ISAT reading and mathematics; ~~the Star Rating list was compared to a rank ordered list of Title I and Title I eligible schools' graduation rates,~~ 7) a cumulative chart was created to illustrate any differences in the Star Rating list with the comparison lists.



As noted in the introduction to this waiver, Idaho's population precludes many schools from having reportable subgroups. Idaho has taken a strong approach in looking at subgroups ~~in two different ways; both from four identified subgroups and then through the combined At-Risk sSubgroup if there were not enough reportable students~~. This approach has allowed the Star Rating system to identify gaps for students that would otherwise only be part of an overall calculation. This identification produces a different list of schools than just comparing gaps of lowest and highest performing subgroups, which only affect a small number of schools in Idaho.

d. Did the SEA identify as focus schools all Title I-participating high schools with a graduation rate less than 60 percent over a number of years that are not identified as priority schools?

As noted in 2.C.ii, Idaho has produced a list of star ratings for all schools. The aggregate data for that ~~preliminary~~ designation is included in Table 2. ~~A de-identified preliminary list of all the Title I schools for 2011-2012, their star rating, priority, focus, and reward status categories schools are provided in Table 2. In spring-summer 2012, Idaho will provide an appeal process, in the same format as the current Adequate Yearly Progress (AYP) appeals, whereby districts can view reviewed the underlying data in a secure setting and appeals appealed any discrepancies. Once-Now that this appeal process is completed, Idaho will has produced a list of all Two Star schools for the U.S. Department of Education. As noted in the aggregate in Table 2 The total number of Two Star Schools in Idaho for 20142-20123 includes 11.2% or 47 of the 417 Title I schools in the State. In the 2010-2011 preliminary data, 9.84% of Idaho schools are preliminarily were classified as Two Star schools. Ten percent or 42 Title I schools in the State have been identified as focus schools for the purposes of this waiver regardless of their star rating.~~

2.E.iii Describe the process and timeline the SEA will use to ensure that its LEAs that have one or more focus schools will identify the specific needs of the SEA's focus schools and their students and provide examples of and justifications for the interventions focus schools will be required to implement to improve the performance of students who are the furthest behind.

*Did the SEA describe the process and timeline it will use to ensure that each LEA identifies the needs of its focus schools and their students and provide examples of and justifications for the interventions the SEA will require its focus schools to implement to improve the performance of students who are furthest behind?*



Every Two-Star School is required to write a Rapid Improvement Plan, with the assistance of the ~~ISDE, Idaho State Department of Education (ISDE)~~. The school's ~~d~~District and the State are responsible for making sure the school implements the Rapid Improvement Plan effectively. If the plan is found not to be effective during the improvement process, the Two-Star School must work with its ~~d~~District and State to make changes accordingly.

Regardless of the school's Rapid Improvement Plan, the State will require every Two-Star School to ~~follow specific guidance to offer~~notify eligible students and their parents of ~~enrollment options, school choice options, supplemental tutoring services~~extended learning time opportunities and financial set-asides for professional development to make sure the needs of all low-achieving students are met. Two-Star Schools must follow this guidance in the school year immediately follow their identification. (See the Timeline in Table 34 for more detailed information.)

~~School choice options and supplemental tutoring services are comprised of a 10 percent district Title I-A set aside intended to provide support to families and students in the time during which the school is working on substantial improvement. The State will define "school choice" as providing an alternative learning setting to families and their eligible students in which instruction is not provided by the same school. The State will define "supplemental tutoring services" as providing extra tutoring in the core academic content areas to families and eligible students. Further description is given in section 2.A.i, eligibility requirements are outlined in Attachment 14 on Family and Student Support Options, and rules concerning the set aside are set forth in Attachment 12.~~

The State will define the "professional development set-aside" as a 10 percent set-aside of Title I-A funds at either a school or district level, depending on variables at the district level that is intended to align with the professional growth needs of the ~~entire~~staff in a school (or district) ~~consistent with Title I regulations~~requirements. Further description is provided in section 2.A.i, and rules concerning the set-aside are set forth in Attachment 12.

The Rapid Improvement Plan will provide the framework for analyzing problems, identifying underlying causes and addressing instructional issues in the school and ~~d~~District that have led to achievement gaps and low student achievement outcomes.

The plan must incorporate strategies based on scientifically based research that will close achievement gaps and address the specific academic issues that caused the school to be identified as a Two-Star School.

The Two-Star School must use the State's WISE Tool to write its Rapid Improvement Plan. The WISE (Ways to Improve School Effectiveness) Tool is a web-based system for school improvement planning. The WISE Tool is made up of 88 indicators. Each indicator is tied to research on how to effectively improve student achievement for all students, including English language learners, students with disabilities and low-achieving students. Through the plan approval process, the State and ~~d~~District will make sure the Two-Star School has selected indicators and is implementing interventions that are proven to help the student populations



affected by the school's achievement gap(s).

While the Two-Star School must determine its current level of performance in relation to all 88 indicators within the WISE Tool, it must set priorities and create in-depth, thorough plans for a smaller, actionable sub-set of approximately 20 indicators. The Two-Star School will be expected to plan for and achieve the full set of 88 indicators within its three years of improvement. However, by creating more in-depth plans for at least 20 indicators, the school can focus on priority student populations and more effectively sustain changes in the greatest area of need.

The State also places requirements on dDistricts in which a Two-Star School is identified. The dDistrict must support the planning and implementation processes in the Two-Star School. The ISDE monitors the dDistrict's support efforts through a local peer review process<sup>23</sup>. The dDistrict must coordinate technical assistance for the school and review the quality of the Rapid Improvement Plan created by the leadership team in the Two-Star School. The dDistrict is responsible for reviewing the plan and ensuring it is implemented effectively.

The dDistrict's review will be documented and submitted to the ISDE, at which time a quality review will be conducted by the State to ensure the dDistrict has met its obligation to support the school.

Two-Star Schools will be required to annually review and update their Rapid Improvement Plans and resubmit these plans for the dDistrict and ISDE to approve. The ISDE will use this data to determine how effectively the Two-Star School is implementing its Rapid Improvement Plan and what, if any, adjustments need to be made. The State will work directly with the dDistrict and school to make the necessary adjustments. The ISDE will continue to monitor the dDistrict's involvement and support to the Two-Star School through the local peer review process.

The ISDE will conduct Instructional Core Focus Visits to Two-Star Schools on an as-needed basis. In the Focus Visit<sup>24</sup>, a small group of staff from the State Department of Education ISDE conducts an on-site visit to evaluate current practices in the school and in the dDistrict. To determine which schools need Focus Visits, the ISDE will analyze student achievement data from the school and district levels, along with other sources of diagnostic information such as results from federal program monitoring visits. If a Focus Visit occurs, the ISDE will expect the Two-Star School to revise its Rapid Improvement Plan to reflect the recommendations provided to the school and the dDistrict.

Districts in which a Two-Star School is identified will enroll in technical assistance opportunities that the ISDE makes available, such as professional development and on-site instructional coaching. The technical assistance opportunity must be aligned with the needs of the Two-Star School. For example, if a Two-Star School in a dDistrict is struggling to meet

<sup>23</sup> The local peer review process applies to Focus and Priority schools and is explained in detail in section 2.A.i.

<sup>24</sup> Focus Visits are described in detail in section 2.A.i.



the needs of diverse learners, the dDistrict would enroll in Response to Intervention training. If the district determines the Two-Star School lacks leadership capacity, the dDistrict would enroll in the Idaho Building Capacity Project<sup>25</sup>, which provides an instructional coach on site. Through the Rapid Improvement Plan, the ISDE will ensure the dDistrict and Two-Star School select the most appropriate technical assistance available.

Table 35 provides a comprehensive timeline for how the State will ensure each dDistrict identifies the needs of its Two-Star School(s) to best meet the needs of the students.

The following information is to provide clarification regarding the substance and appropriateness of the interventions in focus schools. Focus schools must implement the requirements of the Rapid Improvement Plan. Schools in this category are required to implement meaningful interventions designed to improve the academic achievement of students and which must be aligned with all of the following rapid improvement plan principles.

A. Provide strong leadership and decision making procedures by (1) establishing a team structure with specific duties and time for instructional planning; (2) focusing the principal's role on building leadership capacity, achieving learning goals, and improving instruction; and (3) aligning classroom observations with evaluation criteria and professional development.

B. Strengthen collaborative, data-driven decision making surrounding the instructional core by focusing on improved curriculum, assessment, and instructional planning in ways that (1) engage teachers in aligning instruction with standards and benchmarks; (2) engage teachers in assessing and monitoring student mastery; (3) engage teachers in differentiating and aligning learning activities; and (4) assess student learning frequently with standards-based assessments.

C. Improve classroom instruction practices by expecting and monitoring sound instructional methods that are delivered in a variety of modes and sound classroom management

D. Cultivate higher levels of family and community engagement through effective, two-way communication between the school and home and the school and community that centers on shared responsibility for the education of all students.

These interventions are consistent with the research on effective schools, such as the Correlates of Effective Schools (Edmonds, 1982; Lezotte, 2001, 2009) and the Nine Characteristics of High Performing Schools (Shannon & Bylsma, 2007). All schools that overcome the effects of poverty and other disadvantages demonstrate these characteristics in one way or another.

<sup>25</sup> More information on the IBC Project is found in section 2.A.i and at <http://www.sde.idaho.gov/site/ssos/IBC.htm>.



The appropriateness of the specific activities of the intervention will be suited to the unique context of the school. The WISE Tool is structured around these rapid improvement plan principles. Using the WISE Tool process, schools will assess their strengths and weaknesses with the oversight of the district and in conjunction with the data that has resulted in their identification for focus school status. The assessment process includes two prongs. First, the school will complete an analysis of the data that resulted in their identification for focus status. Because the Idaho performance framework for the Star Rating includes multiple metrics with benchmark cut-points for each, this will entail identifying each metric in which performance in the school is unsatisfactory. The school will complete an online form each year that will be housed on the WISE Tool dashboard in which these data are identified as a focal point for improvement efforts. Second, the school will conduct an assessment of its practices compared against the WISE Tool indicators. Using the information from these two prongs, the school will create its goals and objectives in a way that aligns with the differentiated needs demonstrated within its performance data and its practices. During the review process, the district will ensure alignment between the planned interventions/actions and the demonstrated needs. For example, if the school is demonstrating low annual growth in Reading among English Language Learners, the plan will not be approved until it sufficiently addresses the performance of this subgroup. The capacity of the district to support focus schools will be supported through the state review of the plan and the Statewide System of Support Projects in which the district and school is enrolled. Technical assistance will be provided during the creation, implementation, and monitoring of the plan to ensure the interventions identified are appropriately suited to the needs within the school. For example, the State will not approve any plans that do not work to meet the needs of identified subgroups, even if the plan has been approved by the district leadership. While ISDE is looking for actions that address school improvement systemically (i.e., coherently throughout an entire school), the improvement plans must demonstrate a specific course of action that will be likely to meet the needs of any under-served populations of students.



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**Table 35**  
**Timeline on How the State Will Ensure Each District Identifies  
the Needs of Its Two-Star School(s)**

Timeframe	Agency	Action
Spring 2012	SEA	Identify first year of schools achieving Two Stars according to new performance framework; notify districts of school ratings.
Fall 2012	SEA	Conduct statewide training on requirements for new accountability system and transitional elements; provide guidance to districts regarding the requirements that are expected to be implemented in schools which are in the Rapid Improvement Plan category (i.e., Focus Schools); provide guidance to districts regarding the requirements that are expected to be implemented in schools in the Two-Star School status.
School Year 2012 – 2013	SEA	Continue implementation of existing NCLB accountability requirements for all schools until Star Rating system takes full effect. <u>All schools identified as Focus Schools in Table 2 based off of data from the 2011-2012 school year are Focus Schools for the purpose of this waiver request and must begin implementing all requirements of Two-Star schools starting in the Fall 2012-2013 school year regardless of their Star Rating as outlined in Table 37.</u>
Summer 2013	SEA	<u>For all other schools not identified as Focus Schools in Table 2,</u> Notify districts of schools within their districts that are identified in the Turnaround Plan category (i.e., a Priority School) based on two years of Two Star rating or below.
Summer 2013	SEA	<u>For all other schools not identified as Focus Schools in Table 2,</u> Notify districts of schools within their districts that are identified as being in the Two-Star School category (i.e., a Focus School); determine if school data suggest Instructional Core Focus Visit.
Fall 2013	SEA	<u>For all other schools not identified as Focus Schools in Table 2,</u> Conduct Instructional Core Focus Visits in Two-Star schools on an as-needed basis; provide recommendations to districts regarding school and district leadership capacity, instructional practices, and governance structures.
Fall 2013	LEA	<u>For all other schools not identified as Focus Schools in Table 2,</u> Begin providing required services for eligible students in each Two-Star school (e.g., <u>notification of enrollment options</u> <del>School Choice, Supplemental Tutoring Services</del> <u>extended learning time</u> ) and enroll in appropriate State-sponsored technical assistance programs for the district and school.
Fall 2013	LEA and School	<u>For all other schools not identified as Focus Schools in Table 2,</u> Develop school level Rapid Improvement Plan components that account for all



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		improvement activities required by the State.
<b>Spring 2014</b>	LEA	<a href="#">For all other schools not identified as Focus Schools in Table 2, R</a> review school level planning components for district approval.
<b>Spring 2014</b>	SEA	<a href="#">For all other schools not identified as Focus Schools in Table 2, R</a> review school level planning components for State approval.
<b>Timeframe</b>	<b>Agency</b>	<b>Action</b>
<b>Spring 2015 &amp; beyond</b>	SEA	<a href="#">For all other schools not identified as Focus Schools in Table 2, M</a> onitor and support implementation of the Rapid Improvement Plan throughout the duration of the period for which the school is in the Two- <u>Star</u> School category; if the school does not timely exit from the Two- <u>Star</u> School category, make a determination regarding possible State intervention at the district level.

*Has the SEA demonstrated that the interventions it has identified are effective at increasing student achievement in schools with similar characteristics, needs, and challenges as the schools the SEA has identified as focus schools?*

Every Two-Star School must write and implement a Rapid Improvement Plan that it develops through the WISE Tool. The WISE (Ways to Improve School Effectiveness) Tool is a web-based system for school improvement planning that is made up of 88 indicators. Each indicator is tied to researched best practices on how to effectively improve student achievement for all students, including English language learners, students with disabilities and low-achieving students. Through the plan approval process, the [ISDE Idaho State Department of Education \(ISDE\)](#) and [d](#)District will make sure the Two-Star School has selected indicators and is implementing interventions that are proven to help the student populations affected by the school's achievement gap(s).

The ISDE will review student achievement data and other diagnostic information, such as federal program review visits or results of Focus Visits, to determine if the Two-Star School is implementing the Rapid Improvement Plan effectively. The State will require changes be made to the plan, if necessary.

The Two-Star School and its [d](#)District will be required to participate in State technical assistance opportunities, such as Response to Intervention or the Idaho Building Capacity Project that will best meet the needs of the students who are struggling in their school.

This approach has been successful at assisting Idaho schools in meeting the State's adequate yearly progress goals; in significantly decreasing the percentage of schools identified for improvement, corrective action, and restructuring under current ESEA requirements; and for raising student achievement outcomes in general. For example, of 22 schools in the third cohort of the Idaho Building Capacity Project, the average school saw positive gains in the



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percent of students scoring proficient or advanced between 2009 and 2011 in both the students' categories and the primary sub-groups for both Reading and Math. This is demonstrated in Table 36.

**Table 36  
Average Percentage Student Proficiency Gains for  
Schools with Capacity Builders (2009-2011)**

	Average Percent of Students at Proficient or Advanced 2009	Average Percent of Students at Proficient or Advanced 2011	Average gain in individual school's percentage points from 2009 to 2011
Reading (all students)	83%	91%	+7 <sup>26</sup>
Reading (sub-groups of limited English Proficiency, economically disadvantaged, and students with disabilities)	66%	83%	+12
Math (all students)	74%	87%	+10
Math (sub-groups of Limited English Proficiency, economically disadvantaged, and students with disabilities)	56%	75%	+17

*Has the SEA identified interventions that are appropriate for different levels of schools (elementary, middle, high) and that address different types of school needs (e.g., all-students, targeted at the lowest-achieving students)?*

Through the development of the Rapid Improvement Plan, the Two-Star School must take into account its grade levels and individual needs. The WISE (Ways to Improve School Effectiveness) Tool is a web-based system for school improvement planning that is made up

<sup>26</sup> This column does not equal the difference in the columns for 2009 and 2011. This column is based on actual differences at the individual school level, not differences in the averages indicated in the chart.



of 88 indicators. Each indicator is tied to researched best practices on how to effectively improve student achievement for all students, including English language learners, students with disabilities and low-achieving students. The indicators can be adjusted to meet a school's individual needs, as necessary.

The ~~ISDE Idaho State Department of Education (ISDE)~~ and ~~dDistrict~~ ultimately will be responsible for approving the school's Rapid Improvement Plan. Through this approval process, the ISDE and ~~dDistrict~~ will make sure the Two-Star School has selected indicators and is implementing interventions that are appropriate for its grade levels and student needs.

The ISDE and ~~dDistrict~~ will monitor the school's progress and ensure the Rapid Improvement Plan is working effectively for students. If not, the plan will be adjusted to better meet students' needs.

2.E.iv Provide the criteria the SEA will use to determine when a school that is making significant progress in improving student achievement and narrowing achievement gaps exits focus status and a justification for the criteria selected.

*Did the SEA provide criteria to determine when a school that is making significant progress in improving student achievement and narrowing achievement gaps exits focus status?*

Once identified, Two-Star Schools will remain in the Two-Star category unless they meet the exit criteria or drop into the One-Star category. Under Idaho's accountability plan, a school can exit from the Two-Star category once it makes enough progress to rank as a Three-Star School or higher for two consecutive years. (See Section 2.A.i. for more details on Idaho's Star Rating System.) If a Two-Star School ranks in the One-Star category for two consecutive years, it will be required to implement the Turnaround Plan and interventions required of a One-Star School. Table 37 illustrates the sequence of events from entrance to exit related to the Rapid Improvement Plan associated with focus schools.

Schools identified as Focus Schools in Table 2 based off of data from the 2011-2012 school year must implement all requirements of Two-Star schools starting in the Fall 2012-2013 school year regardless of their Star Rating. To exit this Focus Status, they must implement the interventions for a minimum of three years and must obtain a Star Rating of a 3 Star or higher.

For all other Two-Star Schools, the exit criteria are based upon two consecutive years of performance in the Star Rating performance framework. The performance framework is comprised of a comprehensive set of metrics (student achievement, student academic growth, secondary opportunities, graduation, etc.). In order to move to a new level (i.e., a higher Star Rating), the school must attain higher scores across multiple measures.

Thus, if a school is able to improve its performance and sustain it for two years in a row, it has demonstrated significant progress from its initial identification as one of the lowest-performing schools in the State. The State chose two consecutive years at a Three-Star Rating or better, because Four- and Five-Star schools are high performing and a Three-Star rating places the school in the typical domain of "continuous improvement" where the



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majority of schools will be working with LEA oversight. A Three-Star school has demonstrated it does not have the intense need for intervention based upon its performance.

As mentioned in Table 37, if a school has not met the exit criteria by the end of the third year in focus status, the state will intervene as appropriate in district governance. If a school has not improved by that time, the district is considered to be responsible. The intervention with the district will include actions as described in Section 2.A.i.a – Part II within the context of the Instructional Core Focus Visit.

The State will diagnose the level of need for a change in governance based on the process described in the Focus Visit and, along with data provided from the three years of planning that did not result in improvement, work with the district, the school board, or the community to make whatever changes appropriate.

**Table 37**  
**School Level Rapid Improvement Plan Timeline for Entrance, Requirements, and Exit<sup>27</sup>**

Plan Timeline & When the Status Takes Effect	School Requirements	LEA Requirements
<i>School year prior to the school year during which the first Two-Star rating (or less) is earned</i>	<i>Depends on Star Rating Level</i>	<i>Depends on Star Rating Level</i>
Continuous Improvement Plan  <i>The year following the first Two-Star rating (or less)</i>	Submit Continuous Improvement Plan and other state requirements (e.g., plan for aligning state funds)	Review school level Continuous Improvement Plan for approval before submission to the State

<sup>27</sup> Star Ratings lag one school year behind the year in which they are earned because assessment data are produced each Spring and reported in the summer prior to the following school year. For example, if during the Spring testing window for 2011-12, a school performed in such a way as to earn a Three Star rating, the Three Star rating would go into effect for 2012-13, immediately after the Spring data are finalized and released. Entrance to the requirements for Two-Star schools is based on two consecutive years in which a Two-Star rating or less is earned. In other words, the first year may be One-Star and the second Two-Star, or Two-Star then One-Star, or both years may be Two-Star in order to enter the requirements associated with Two-Star Schools that lack progress. Schools identified as Focus Schools in Table 2 based off of data from the 2011-2012 school year must implement all requirements of Two-Star schools starting in the Fall 2012-2013 school year regardless of their Star Rating. To exit this Focus Status, they must implement the interventions for a minimum of three years and must obtain a Star Rating of a 3 Star or higher.



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Plan Timeline & When the Status Takes Effect	School Requirements	LEA Requirements
<a href="#">Rapid Improvement Plan - Year 1</a>  <a href="#">For those schools identified as Focus Schools in Table 2.</a>	<a href="#">Fall 2012</a>  <a href="#">Complete analysis of 2011-2012 school year growth and performance data and institute changes based on this data to make instructional improvements in math and ELA areas.</a>  <a href="#">Complete first evaluative observation or evaluative conversation with all teachers in school based off of the Charlotte Danielson Framework</a>  <a href="#">Finalize the development of the method by which schools will collect parental input for teacher and principal evaluations and collect data.</a>  <a href="#">Begin development of school level Rapid Improvement Plan</a>  <a href="#">Spring 2013</a> <a href="#">Enroll district and school in appropriate technical assistance programs</a>  <a href="#">Review and revise school level Rapid Improvement Plan with the District for approval before submission to the State</a>	<a href="#">Fall 2012</a>  <a href="#">Ensure completion of analysis of 2011-2012 school year growth and performance data and institution of changes based on this data to make instructional improvements in math and ELA areas.</a>  <a href="#">Ensure that school completes first evaluative observation or evaluative conversation with all teachers in school based off of the Charlotte Danielson Framework</a>  <a href="#">Ensure that school finalizes the development of the method by which schools will collect parental input for teacher and principal evaluations and collect data.</a>  <a href="#">Oversee the development of school level Rapid Improvement Plan</a>  <a href="#">Spring 2013</a> <a href="#">Enroll district and school in appropriate technical assistance programs</a>  <a href="#">Review and ensure appropriate revisions in school level Rapid Improvement Plan for approval before submission to the State</a>



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Plan Timeline & When the Status Takes Effect	School Requirements	LEA Requirements
<p>Rapid Improvement Plan - Year 1</p> <p><i>The year following the second Two-Star rating (or less)</i></p>	<p><u>Fall 2013 and beyond</u></p> <p>Participate in Instructional Core Focus Visit (if required by SEA)</p> <p><del>Begin providing</del> <u>Notifying students and their parents of enrollment options</u> <del>School Choice</del></p> <p><del>Begin providing</del> <u>extended learning time</u> <del>Supplemental Tutoring Services</del></p> <p>Create school level Rapid Improvement Plan <u>aligned with turnaround principles and other state requirements</u></p>	<p><u>Fall 2013 and beyond</u></p> <p>Enroll district and school in appropriate technical assistance programs</p> <p>Oversee the development of school level Rapid Improvement Plan</p> <p>Review school level <u>Turnaround Rapid Improvement</u> Plan for approval before submission to the State</p>
<p>Rapid Improvement Plan - Year 2</p> <p><i>Consecutive year after "Rapid Improvement Plan - Year 1"</i></p>	<p>Full implementation of school level Rapid Improvement Plan and other state requirements</p> <p>Submit updates and revisions to Rapid Improvement Plan</p>	<p>Provide continuous support and monitoring of school level Rapid Improvement Plan aligned and other <u>state</u> requirements</p> <p>Review updates and revisions to school level Rapid Improvement Plan for approval before re-submission to the State</p>
<p>Rapid Improvement Plan - Year 3</p> <p><i>Consecutive year after "Rapid Improvement Plan - Year 2", <u>unless</u> the exit criteria is met.</i></p>	<p>Continue full implementation of school level Rapid Improvement Plan and other <u>state</u> requirements</p> <p>Submit updates and revisions to Rapid Improvement Plan</p> <p><i>NOTE: If a Three-Star rating or higher has been reached in both <u>Turnaround Rapid Improvement</u> Plan – Years 1 and 2, the school may exit the Rapid Improvement Plan Requirements one year early <u>unless the school is identified as a Focus School in Table 2.</u></i></p>	<p>Provide continuous support and monitoring of school level Rapid Improvement Plan and other <u>state</u> requirements</p> <p>Review updates and revisions to school level Rapid Improvement Plan for approval before re-submission to the State</p>



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Plan Timeline & When the Status Takes Effect	School Requirements	LEA Requirements
Rapid Improvement Plan - Year 4  <i>Consecutive year after "Rapid Improvement Plan - Year 3"</i>	n/a	If a school has not met the exit criteria of two consecutive years at Three-Star rating or higher by the end of Rapid Improvement Plan – Year 3, the State will intervene as appropriate with district governance according to the district context and leadership capacity at the central office and school board.

a. *Do the SEA's criteria ensure that schools that exit focus status have made significant progress in improving student achievement and narrowing achievement gaps?*

The performance framework by which the State evaluates progress includes measurements of proficiency, growth, growth to proficiency, and postsecondary and career readiness. To exit the Two-Star category, a school must demonstrate progress across these comprehensive measures of student achievement for two consecutive years.

*Is the level of progress required by the criteria to exit focus status likely to result in sustained improvement in these schools?*

Based on the State's comprehensive accountability system, the ISDE firmly believes the exit criteria of two consecutive years achieving a Three-Star ranking will result in sustained improvement for Two-Star Schools.

These schools will have demonstrated evidence of significant increases in student achievement across proficiency, growth, growth to proficiency, and postsecondary and career-readiness metrics for more than a single school year.



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**TABLE 2: REWARD, PRIORITY, AND FOCUS SCHOOLS**

Provide the SEA's list of reward, priority, and focus schools using the Table 2 template. Use the key to indicate the criteria used to identify a school as a reward, priority, or focus school.

**TABLE 2: 2011-2012 ~~PRELIMINARY~~ REWARD, PRIORITY, AND FOCUS SCHOOLS ~~RATINGS~~**

<b>School NameAnonymous ID</b>	<b>REWARD SCHOOL</b>	<b>PRIORITY SCHOOL</b>	<b>FOCUS SCHOOL</b>
<b>Focus Schools<sup>28</sup></b>			<b>G</b>
<b>Priority Schools</b>		<b>C, D, E</b>	
<b>Reward Schools</b>	<b>A</b>		
<u>519523066</u>	<u>A</u>		
<u>588770961</u>	<u>A</u>		
<u>36560977</u>	<u>A</u>		
<u>722803226</u>	<u>A</u>		
<u>572827226</u>	<u>A</u>		
<u>161700119</u>	<u>A</u>		
<u>332087781</u>	<u>A</u>		
<u>539202584</u>	<u>A</u>		
<u>305275086</u>	<u>B</u>		
<u>319013512</u>	<u>B</u>		
<u>321951841</u>	<u>B</u>		
<u>464579433</u>	<u>B</u>		
<u>832296147</u>	<u>B</u>		
<u>739201149</u>	<u>B</u>		
<u>700916162</u>	<u>B</u>		
<u>251408308</u>	<u>B</u>		
<u>188372829</u>	<u>B</u>		

<sup>28</sup> As noted in 2.C.ii, Idaho has produced a list of star ratings for all schools. In spring-summer 2012, Idaho will provide an appeal process, in the same format as the current Adequate Yearly Progress (AYP) appeals, whereby districts can view the underlying data in a secure setting and appeals any discrepancies. Once this appeal process is completed, Idaho will produce a list of all One Star, Two Star and Five Star schools for the US Department of Education.



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<b>School NameAnonymous ID</b>	<b>REWARD SCHOOL</b>	<b>PRIORITY SCHOOL</b>	<b>FOCUS SCHOOL</b>
<a href="#"><u>43209053</u></a>	<a href="#"><u>B</u></a>		
<a href="#"><u>858681018</u></a>	<a href="#"><u>B</u></a>		
<a href="#"><u>650461079</u></a>	<a href="#"><u>B</u></a>		
<a href="#"><u>288315455</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>907212877</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>438763334</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>604385273</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>156948827</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>626053312</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>372932822</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>313421142</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>822987481</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>693733145</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>172283353</u></a>		<a href="#"><u>C</u></a>	
<a href="#"><u>408335151</u></a>		<a href="#"><u>D</u></a>	
<a href="#"><u>880036037</u></a>		<a href="#"><u>D</u></a>	
<a href="#"><u>759767539</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>672140490</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>988180913</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>71266504</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>124193623</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>958155720</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>90893835</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>60540185</u></a>		<a href="#"><u>E</u></a>	
<a href="#"><u>511598139</u></a>			<a href="#"><u>F</u></a>
<a href="#"><u>40249570</u></a>			<a href="#"><u>F</u></a>
<a href="#"><u>870860703</u></a>			<a href="#"><u>F</u></a>
<a href="#"><u>902914604</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>28449542</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>837599956</u></a>			<a href="#"><u>F, G</u></a>



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<b>School NameAnonymous ID</b>	<b>REWARD SCHOOL</b>	<b>PRIORITY SCHOOL</b>	<b>FOCUS SCHOOL</b>
<a href="#"><u>641627514</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>758816532</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>553059917</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>979067809</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>393775509</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>504110079</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>774612909</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>543798893</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>307964900</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>647602602</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>502526998</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>635942984</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>501596717</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>698090567</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>373973314</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>151876222</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>139648120</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>597086552</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>196978226</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>769908706</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>111047376</u></a>			<a href="#"><u>F, G</u></a>
<a href="#"><u>566590667</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>743645721</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>984559113</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>279816406</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>458415626</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>786960476</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>197713590</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>188111491</u></a>			<a href="#"><u>G</u></a>
<a href="#"><u>838042622</u></a>			<a href="#"><u>G</u></a>



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<del>School Name</del> <u>Anonymous ID</u>	REWARD SCHOOL	PRIORITY SCHOOL	FOCUS SCHOOL
<u>668442136</u>			<u>G</u>
<u>437500134</u>			<u>G</u>
<u>219001700</u>			<u>G</u>
<u>904081086</u>			<u>G</u>
<u>753218908</u>			<u>G</u>
<u>352269527</u>			<u>G</u>

Total # of Reward Schools: 32 41

Total # of Priority Schools: 29 21

Total # of Title I schools in the State: 548 417

Total # of Title I-participating high schools in the State with graduation rates less than 60% over three years: 5 0



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**Key**

<b><u>Reward School Criteria:</u></b> <ul style="list-style-type: none"><li><b>A.</b> Highest-performing school</li><li><b>B.</b> High-progress school</li></ul> <b><u>Priority School Criteria:</u></b> <ul style="list-style-type: none"><li><b>C.</b> Among the lowest five percent of Title I schools in the State based on the proficiency and lack of progress of the “all students” group</li><li><b>D.</b> Title I-participating or Title I-eligible high school with graduation rate less than 60% over a number of years</li><li><b>E.</b> Tier I or Tier II SIG school implementing a school intervention model</li></ul>	<b><u>Focus School Criteria:</u></b> <ul style="list-style-type: none"><li><b>F.</b> Has the largest within-school gaps between the highest-achieving subgroup(s) and the lowest-achieving subgroup(s) or, at the high school level, has the largest within-school gaps in the graduation rate</li><li><b>G.</b> Has a subgroup or subgroups with low achievement or, at the high school level, a low graduation rate</li><li><b>H.</b> A Title I-participating high school with graduation rate less than 60% over a number of years that is not identified as a priority school</li></ul>
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**2.F PROVIDE INCENTIVES AND SUPPORTS FOR OTHER TITLE I SCHOOLS**

- 2.F Describe how the SEA's differentiated recognition, accountability, and support system will provide incentives and supports to ensure continuous improvement in other Title I schools that, based on the SEA's new AMOs and other measures, are not making progress in improving student achievement and narrowing achievement gaps, and an explanation of how these incentives and supports are likely to improve student achievement and school performance, close achievement gaps, and increase the quality of instruction for students.

*Does the SEA's differentiated recognition, accountability, and support system provide incentives and supports for other Title I schools that, based on the SEA's new AMOs and other measures, are not making progress in improving student achievement and narrowing achievement gaps? Are those incentives and supports likely to improve student achievement, close achievement gaps, and increase the quality of instruction for students?*

The State's accountability system provides incentives and supports that are likely to improve student achievement, close achievement gaps, and increase the quality of instruction for all students in Idaho, including those in other Title I schools.

Idaho has developed one comprehensive system of recognition, accountability, and support that applies to all schools, regardless of Title I funding. Non-Title I schools and Title I schools not identified as One-Star or Two-Star Schools will be evaluated under the same accountability system each year. All schools will be rated based on a Five-Star scale. Schools that receive a Three-Star rating are approaching the State goals for excellence in proficiency, growth, growth to proficiency, and postsecondary and career-readiness but still have areas of improvement.

Therefore, Three-Star Schools will be required to develop and implement a Continuous Improvement Plan.

The Idaho State Department of Education (ISDE) has designed a set of options for Three-Star Schools that incentivize internal motivation among school staff by (1) giving them more operational flexibility in school improvement planning at the local level, (2) creating options for participation in State support programs at no cost, (3) permitting the schools and their districts to pursue funding flexibility related to Title I set-asides, and (4) allowing Three-Star Schools to more easily transition to Four-Star or Five-Star status. Here is a brief description of these options for Three-Star Schools.



First, the Three-Star School has more flexibility in the improvement planning process. The school will develop and implement a Continuous Improvement Plan in the WISE Tool<sup>29</sup>, the State's web-based school improvement planning tool. Whereas One-Star and Two-Star Schools must address plans that meet all 88 indicators in the WISE Tool, Three-Star Schools will have more flexibility and only need to address indicators that align with the school's areas of need. The plan will be annually revised and updated. The ISDE will review the plan for effectiveness.

Second, the ISDE will offer Three-Star Schools the opportunity to participate in statewide technical assistance activities offered through the Statewide System of Support. Participation in training, leadership support networks, or intensive improvement coaching is available at no cost to the Three-Star School. For example, if the Three-Star School and the ISDE determine the school needs technical assistance in building instructional leadership within the school, then the school can participate in the Idaho Building Capacity Project. Through this project, the school will receive on-site coaching from a veteran educator for up to three years.

Third, the ISDE will give Three-Star Schools more financial flexibility as they implement their Continuous Improvement Plans. Three-Star Schools as well as Four-Star and Five-Star Schools will receive optional fiscal flexibility and will not be required to set aside Title I-A funding for professional development according to the definitions and parameters defined in this request. ~~The following types of set asides will be optional to promote continuous improvement~~<sup>30</sup>:

- ~~Set aside Title I-A funds for supplemental tutoring services to provide additional learning opportunities for students and according to the definitions provided in this ESEA Flexibility request.~~
- ~~Set aside Title I-A funding for professional development according to the definitions and parameters defined in this request.~~

In addition, ISDE will ensure that Three-Star Schools are given priority in grant opportunities (prior to Four- and Five-Star Schools) to obtain additional funds to support improvement efforts, as appropriate and as permitted by grant regulations.

Fourth, the State's accountability system creates an incentive for schools to move up to a Four-Star or Five-Star rating, where they can earn rewards and public recognition. Three-Star Schools will be able to transition more easily to the Four-Star rating or higher. Under Idaho's accountability system, a Three-Star School can move to a new rating in just one school year.

<sup>29</sup> The WISE (Ways to Improve School Effectiveness) Tool is a web-based system for school improvement planning. It is made up of 88 indicators aligned to researched best practices.

<sup>30</sup> A complete definition and description of the set-aside ~~flexibility option~~ is provided in Attachment 12.



The ISDE and districts will make sure these incentives and supports improve student achievement outcomes in Three--Star Schools. Similar to the improvement planning process for One--Star and Two--Star Schools, the district in which a Three--Star School is located will play a critical role in the development and implementation of the school's Continuous Improvement Plan. Specifically, districts will be required to review the school's Continuous Improvement Plans each year, provide feedback and approve the plans prior to submitting such plans to the ISDE.

ISDE will provide a specific rubric for Three--Star Schools, and the district will use this rubric to conduct peer review<sup>31</sup> sessions either within the district or through partnerships with other school districts. The peer review will ensure a high-quality implementation of the Continuous Improvement Plan. The district will make online reports on its progress and support of the Three Star School through the WISE Tool. ISDE will work with Three--Star Schools by reviewing the Continuous Improvement Plan, monitoring district reports in the WISE Tool and providing schools with access to technical assistance through the Statewide System of Support.

Through these incentives and supports at the State and district levels, the State will make sure other Title I schools and non-Title I schools improve student achievement, close achievement gaps, and increase the quality of instruction for all students in Idaho.

Idaho will include AMOs in the Sate report card for use in setting goals and measuring progress. Additionally, objectives are inherently embedded into the Star Rating System. As described on p.137 of the state plan, the Star Rating System applies to all schools, including Title I schools. The Star Rating for each school accounts for progress in the areas of absolute student achievement, student growth from one year to the next, and postsecondary readiness. If any school is not making appropriate progress in the Star Rating performance framework, they will be identified in the One-, Two-, or Three--Star categories and will be required to abide by the associated requirements.

The requirements for these schools will include improvement plans in which areas of weak performance must be addressed (e.g., performance framework areas that need improvement or AMOs that were missed). For example, if a school misses an AMO in Reading for English Language Learners, the WISE Tool plan created must include strategies that support the improvement of this population's performance. Specifically, schools with an overall rating of Three Star or lower will be required to build into their Continuous Improvement Plan (Three Star), Rapid Improvement Plan (Two Star) or Turnaround Plan (One Star) a plan specifically for reaching the

<sup>31</sup> Local peer review is a process that balances local review by and assistance from the district for each school. It is assisted by quality control review processes in which the State supports the district. A full description is provided in section 2.A.



AMOs for any subgroup or overall group that does not reach the target.

Further, the WISE tool indicators will be structured to focus on the AMOs in reading, language usage and mathematics. In addition, any Five--Star School that fails to meet an AMO in any subject at the overall or subgroup level will not be eligible for the classification of a Highest--Performing School.

Regarding schools that are not identified for focus or priority status, and which have not attained a Four- or Five--Star Rating, they are required to implement the Continuous Improvement Plan requirements. The incentives and supports are already described in Section 2.F.i.

Based on peer review feedback, the Sstate will add the following incentive to its plan. The Sstate will include leaders from Four- and Five--Star schools in the peer review process of improvement plans as a form of recognition for reward schools and to serve as examples and support to Three--Star schools.

It is our understanding that the ESEA Flexibility waiver request does not call for specific interventions in other Title I schools. However, section Section 2.F of Idaho's plan does describe incentives and supports that are to be provided to other Title I schools that are not priority schools or focus schools. For example, Three-Star schools must plan and implement Continuous Improvement Plans and their associated requirements, such as the alignment of Sstate funds and teacher evaluation to the improvement process. --The State estimates based on 2010-2011 and 2011-2012 preliminary data that approximately 40% of schools will be rated Three--Star Schools which will be required to implement the Continuous Improvement Plan requirements. The ESEA Flexibility Plan waives the requirement for the State and its LEAs to identify schools for school improvement, corrective action, and restructuring. Since these three designations are linked to multiple programs within ESEA that are not specifically addressed by the waiver, ISDE will consider all One, Two, and Three Star schools and districts that are Title I funded to be in "school improvement" for the purpose of competitive priorities and eligibility for other ESEA programs, such as 21<sup>st</sup> Century Community Learning Centers, the School Improvement program under 1003a, and any new Tier I and III lists created for the School Improvement Fund under 1003g. This modification is being made in order to provide adequate supports for other Title I schools.



**2.G BUILD SEA, LEA, AND SCHOOL CAPACITY TO IMPROVE STUDENT LEARNING**

- 2.G *Describe the SEA's process for building SEA, LEA, and school capacity to improve student learning in all schools and, in particular, in low-performing schools and schools with the largest achievement gaps, including through:*
- i. *timely and comprehensive monitoring of, and technical assistance for, LEA implementation of interventions in priority and focus schools;*
  - ii. *holding LEAs accountable for improving school and student performance, particularly for turning around their priority schools; and*
  - iii. *ensuring sufficient support for implementation of interventions in priority schools, focus schools, and other Title I schools identified under the SEA's differentiated recognition, accountability, and support system (including through leveraging funds the LEA was previously required to reserve under ESEA section 1116(b)(10), SIG funds, and other Federal funds, as permitted, along with State and local resources).*

*Explain how this process is likely to succeed in improving SEA, LEA, and school capacity.*

*Is the SEA's process for building SEA, LEA, and school capacity to improve student learning in all schools and, in particular, in low-performing schools and schools with the largest achievement gaps, likely to succeed in improving such capacity?*

Section 2.G asks how Idaho will monitor the progress for priority and focus schools. Section 2.G.a outlines the primary components for how the State will monitor and interact with priority and focus schools. First, the improvement planning process entailed in the WISE Tool is monitored before, during, and after identification for priority and focus status. Planning is connected to the AMOs and performance framework for each school since strategies must be included for specifically reaching the AMOs for any subgroup or overall group that does not reach the target. In addition, any Five--Star School that fails to meet an AMO in any subject at the overall or subgroup level will not be eligible for the classification of a Highest--Performing School in order to maintain a focus on all students. The State evaluates the quality of the plan as does the district. Furthermore, Capacity Builders provided to priority and focus schools are responsible for working with the school and district leadership team to ensure that the planning process aligns with the needs that are demonstrated in the school's performance data (achievement, growth, subgroup performance, graduation rates, etc.). To review the WISE Tool plans, the State uses a rubric that measures the objectives created, the tasks identified, and (after the first year) the evidence that implementation is occurring. Progress in planning and evidence is monitored yearly. Second, Star Ratings change yearly.



The district and the State monitor the changes in performance each year to ensure alignment between performance and interventions. Third, Focus Visits occur annually in One--Star schools.

The State uses this to have an onsite monitoring process that aligns with the turnaround principles.

Monitoring of the implementation takes place to ensure alignment with the planning that occurs in the WISE Tool. Fourth, technical assistance programs take place anywhere from quarterly (RTI training) to weekly (first year IBC). These programs are aligned with the Focus Visit, the WISE Tool, and the accountability system in general. Our technical assistance providers monitor the progress of schools during each interaction. For example, RTI coaches and IBC Capacity Builders regularly monitor implementation activities and provide feedback “down” the line to leadership teams at the school and district and “up” the line to personnel at the SEA.

The ISDE has described how it will build capacity at the school, district and State level through the improvement planning process, effective implementation of an improvement plan and technical assistance offered through the Idaho Statewide System of Support. All these processes are aligned with researched best practices and will be evaluated on a regular basis by the district and the State to ensure they are working effectively at the school level. If not, changes will be made accordingly to best meet the needs of the students in the school.

Idaho’s accountability system will build capacity at the State, district and school levels for the following reasons.

First, strong performance at the district level is necessary for improvement to take place the school level. The ISDE ensures that districts play a critical role in the improvement planning and implementation process. The ISDE, district and school work together to develop an improvement plan for schools that rated as One Star, Two Star or Three Star. The plans will vary depending on the schools’ needs, but each entity uses the web-based WISE Tool to write and review the improvement plan. Through this planning process, the State ensures both the district and school address leadership needs.

Second, when schools participate in technical assistance activities or support programs, such as Response to Intervention training or the Idaho Building Capacity Project, the ISDE requires district leadership to enter into performance agreements that detail expectations for how the district also will be involved in the project and support the schools. To build capacity at the State level, the ISDE has formed partnerships with institutions of higher education, such as Boise State University, to successfully implement and sustain the Idaho Building Capacity Project and other critical technical assistance activities.



Third, when the ISDE conducts professional development opportunities for Response to Intervention or other programs that work to strategically meet the needs of English language learners, students with disabilities and low-achieving students, the trainings are designed to support leadership teams. The ISDE focuses on a district or school leadership team, rather than only individuals, to ensure the program is sustained.

These trainings require all district leadership roles to be present, such as the superintendent, federal programs director, LEP director, special education director, curriculum director.

Fourth, all improvement activities are tied to research. The ISDE requires districts and schools to develop improvement plans using the web-based WISE Tool because it includes 88 indicators that are tied to research. This bolsters the improvement process because teams know how to connect their learning to the planning expectations the ISDE has put in place.

Fifth, improvement activities at the district and school levels are evaluated annually by the State and the school district to make sure the school's improvement plan is working effectively to raise student achievement or close achievement gaps. The State and district use achievement data and other diagnostic factors, such as on-site Focus Visits or federal program review visits, to conduct the evaluation. If the plan is not working effectively, the State and district will work with the school to revise its plan or offer additional technical assistance activities aligned to the school's needs.

In these ways, the State is making sure it is building leadership capacity at every level. The ISDE integrates a State role, district role and school role into every planning, implementation and review process. The effectiveness of this model will ensure leaders at all levels gain the knowledge and skills they need to support teaching and learning and implement continuous, substantial improvement after the State's involvement ends.

The ISDE believes this system of accountability will work to improve student achievement and close achievement gaps because it is based on research and based on previous successes in the State. Idaho became the subject of a case study on promising practices within the Statewide System of Support in 2010. The National Center on Innovation and Improvement (CII) published *Transforming a Statewide System of Support: The Idaho Story* (Lane, 2010) highlighting how the State's model has resulted in changed partnerships with districts and schools in a way that is contributing to improved student achievement and sustainable improvement across the State. The following is an excerpt for the findings of the study:



*The original purpose of this case study was to document how Idaho had developed its statewide system of support. In the process of documenting Idaho's story, what we found was a state that has dramatically altered its relationship with districts and schools. In three years, beginning in 2008, the Idaho Department of Education has transformed its approach to working with schools, revised (or created anew) all the tools that they use with schools around school improvement, and developed a set of institutional partners that strengthen the system, thereby contributing to the sustainability of overall improvement efforts.*

*Perhaps most telling is the fact that by the end of the 2010 school year, many schools and districts **not** identified for improvement began to request access to the same supports and assistance provided to underperforming schools...Idaho is developing a system of support for all schools, not just those identified as low performing by state and federal accountability systems (Lane, 2010).*

The plans outlined in Idaho's waiver request build on the success that the State has already experienced. Based on evidence provided by cases studies, such as the Lane (2010) study of the Idaho Statewide System of Support, and the timeframe for when the IBC program, the WISE Tool, and the other programs that are included in this plan were put into place, Idaho attributes this state-wide improvement largely to its system of support. The system has a track record of improving achievement, and, therefore, has demonstrated the capacity necessary to implement the programs described.

Furthermore, the Idaho plan does not represent a substantial deviation from Idaho's current work. The waiver therefore provides a more comprehensive means to implement what is needed, albeit with a shift in the performance framework. In other words, we may be focusing on different schools because of the new Star Rating performance framework, but the capacity for the planned activities already exists. For example, Idaho's most labor intensive project, the Idaho Building Capacity Project, has served over 100 of the state's approximately 650 schools, and more than 40 of Idaho's school districts since January 2008. This 15% of all the schools in the entire state, not just Title I schools, and equals about 30% of Idaho's districts. Considering the IBC Project only currently serves Title I schools that are in improvement status, the project has worked with 25% of the 400 Title I served schools in the state. Serving the priority schools and focus schools (which represent only 15% of Title I schools, or about 60 schools) would actually take less capacity than what is currently exerted. Furthermore, among IBC school sites, proficiency rates have increased substantially in the all students categories and among subgroups, as is demonstrated in Table 33.

The improvements that have been experienced in Idaho demonstrate that the capacity of the SEA, LEAs, schools, and the external partners that are involved in the work is sufficient to continue what is proposed in Idaho's plan.



However, in order to continue improving SEA capacity, Idaho has entered into a Research Alliance with the Regional Education Laboratory (REL) at Education Northwest in Portland, OR. This alliance begins in May 2012 and continues throughout the contract period of the REL agreement with the U.S. Department of Education. The alliance is centered on evaluating the Statewide System of Support (SSOS) in order to promote continuous improvement within SSOS programs and their impact on districts and schools.

The SSOS-REL Alliance is made up of core members from the SEA who are responsible for implementing the support programs identified in this plan and receives advisory input from Idaho stakeholders in schools, districts, and institutes of higher education. This endeavor will continue to build SEA capacity and will have a direct impact on LEA capacity.

- a. *Is the SEA's process for ensuring timely and comprehensive monitoring of, and technical assistance for, LEA implementation of interventions in priority and focus schools likely to result in successful implementation of these interventions and in progress on leading indicators and student outcomes in these schools?*

The ISDE has described a plan to evaluate improvement plans and interventions in One-Star and Two-Star Schools on a regular basis. Every One-Star and Two-Star School must submit an improvement plan through the WISE Tool, the State's web-based school improvement planning tool. The WISE Tool has 88 indicators tied to research in school improvement. Each district in which a One-Star or Two-Star School is located also must develop and submit an improvement plan. All interventions must be aligned to the indicators in a school or district's improvement plan. Here are the ways in which the improvement plans for One-Star and Two-Star Schools will be monitored:

First, the WISE Tool contains several ways in which the State and school districts can monitor improvement activities. It is accessible at the State, district and school levels so staff at all levels can coordinate planning and provide feedback. External improvement coaches, such as those provided through the Idaho Building Capacity Project, will have access to the WISE Tool to comment on improvement plans. The Tool includes timelines and self-monitoring procedures to promote internal responsibility and team planning.

Second, the ISDE and the school district are responsible for evaluating the effectiveness of the One-Star or Two-Star school's improvement plan annually. The ISDE also will evaluate the district's improvement plan annually.



The ISDE and district will use student achievement data and other diagnostic information, such as Focus Visits (if conducted) or federal program reviews. If a plan is not being implemented effectively, the ISDE and district will make changes to the plan or interventions offered to the school.

*Did the SEA describe a process for the rigorous review and approval of any external providers used by the SEA and its LEAs to support the implementation of interventions in priority and focus schools that is likely to result in the identification of high-quality partners with experience and expertise applicable to the needs of the school, including specific subgroup needs?*

The ISDE has described a rigorous review and approval process for external providers. The following is the process the ISDE will use.

Many of Idaho's districts and schools are located in rural and remote areas. Thus, it is unlikely that new external providers will be available to assist One-Star or Two-Star Schools in their efforts to improve student learning. As such, ISDE does not intend to maintain a state list of newly approved providers. However, the ISDE has existing partnerships with Idaho's three institutions of higher education (IHEs), which serve as approved external partners and have a track record of providing high-quality services in every region of Idaho.

These approved providers include the Center for School Improvement at Boise State University, the Intermountain Center for Education Effectiveness at Idaho State University, and the College of Education at the University of Idaho.

If school districts desire to utilize additional external providers, they may choose to do so at a local level. To attain State approval, the district must define the plan for services, the costs entailed and governance relationships agreed upon in each applicable One-Star or Two-Star School through the district improvement planning process, submitted to the ISDE in the WISE Tool.

The plans for other external providers will be evaluated on a case-by-case basis by the Statewide System of Support (SSOS) Leadership Team, which oversees the review and approval of all improvement plans and associated requirements. Districts plans for other external providers will be evaluated based on the degree to which they demonstrate:

- a rigorous and thorough review, or screening, of available external providers has been conducted by the district
- a rigorous and thorough bidding process has been conducted by the district, if more than one choice is available
- that the external provider's services align with the implementation of the turnaround principles as defined in the Idaho Accountability Plan
- the external provider is sufficiently qualified to provide the services necessary for implementation of the turnaround principles or associated services



If the plan for utilizing a previously unapproved external provider is found lacking, the SSOS Leadership Team will provide direct support and assistance to district leadership in the process of recruiting, screening, and selecting such providers, and then require the plan to be revised as appropriate.

- b. *Is the SEA's process for ensuring sufficient support for implementation in priority schools of meaningful interventions aligned with the turnaround principles (including through leveraging funds the LEA was previously required to reserve under ESEA section 1116(b)(10), SIG funds, and other Federal funds, as permitted, along with State and local resources) likely to result in successful implementation of such interventions and improved student achievement?*

The SEA's process for ensuring sufficient support for implementation in One-Star Schools of meaningful interventions is aligned with the Turnaround Principles and likely to result in successful implementation of such interventions and improved student achievement.

The interventions, planning, and expectations for implementation that ISDE has created for schools in One-Star status are comprehensive and integrated across multiple support programs and aligned with each other.

The Turnaround Principles are embedded in the improvement planning process that all One-Star Schools must complete through the WISE Tool, a web-based school improvement planning tool with 88 different indicators. Additional actions, such as the support of effective teaching and learning through professional development and the temporary support needs of students, are enabled through leveraging District funds previously targeted to specific activities under ESEA Section 1116(b)(10).

Districts with One-Star Schools are still required to set aside funds for professional development, ~~school choice, and supplemental educational services~~ according to the definitions provided in the Idaho Accountability Plan. Additionally, the State leverages funds through section 1003(a) and 1003(g) allocations as permitted within ESEA to deliver and provide services directly to schools and their districts as well as provide grants directly to the district to pay for other innovations at the local level. Lastly, the State has written flexibility into this waiver request with the intent of aligning other Federal funding streams, such as 21<sup>st</sup> Century Community Learning Centers, to support extended learning time ~~and supplemental tutoring to for~~ students in need of support.

An additional process the State plans to use to support successful implementation of the Turnaround Principles is the coordination of State funds to reward teachers in hard-to-fill and leadership positions. In 2011, Idaho passed comprehensive education reform laws, known as "Students Come First," that includes a ~~s~~Statewide pay-for-performance plan to reward teachers for improvement student achievement, working in hard-to-fill positions and taking on leadership duties.



In the 2012-13 school year, school districts will work with teachers to develop plans to identify the hard-to-fill positions and leadership duties that should be awarded at the local level. Plans and bonuses will vary from district to district.

The State will provide funding in Fall 2013 for districts to offer rewards in these two areas to support effective teaching and leadership. For example, districts can use these funds to incentivize job-embedded instructional coaching by providing bonuses to teacher leaders. For more information on Students Come First laws, see <http://www.studentscomefirst.org/bill.htm>.

- c. *Is the SEA's process for holding LEAs accountable for improving school and student performance, particularly for turning around their priority schools, likely to improve LEA capacity to support school improvement?*

The SEA's process for holding dDistricts accountable for improving school and student performance, particularly for turning around One-uStar Schools, is likely to improve dDistrict capacity to support school improvement.

As has been described throughout the flexibility request, Idaho has designed all of its K-12 educational support systems with significant consideration given to district leadership capacity and the ways in which districts develop and support school leadership capacity that is necessary to support school improvement.

- First, the district must be involved in the One-uStar School's improvement planning process and implementation of its improvement plan. ISDE holds districts accountable for their responsibility through multiple means, one of which is State review of school improvement plans the district has already approved via local peer review. Subsequently, ISDE will offer assistance to the district and work with them to improve the plans and/or improve the district's capacity to help its schools improve student learning.
- Second, ISDE programs emphasize the development of district leadership capacity along with school leadership. For example, the Idaho Building Capacity Project ensures that for every participating school that is in need of improvement, there is an external Capacity Builder, or improvement coach, who also works with the district superintendent and district leadership team on improvement of the district system.
- Third, ISDE designs and delivers training opportunities for Response to Intervention and other initiatives to district leadership teams to ensure they have the capacity to implement sustainable school improvement practices. District and school leadership teams must work in tandem to achieve higher student outcomes, especially in turning around the lowest-performing schools.



## PRINCIPLE 2: SUMMARY

The Idaho State Department of Education (ISDE) is seeking to maximize the flexibility being offered within ESEA in order to build on previously successful practices and move to a more comprehensive approach to improvement and accountability. The State strongly believes in the moral imperative to improve the academic outcomes of all students, but especially those most at risk. The State has experienced a reversal in the trajectory of schools identified for improvement, and ISDE has developed a plan for differentiated recognition, accountability, and support in order to capitalize on the momentum of the past few years.

The State recognizes that it still must work to improve the academic outcomes of students who are at risk. In order to differentiate between the needs of schools and districts, the State model is changing from a conjunctive system of achievement targets to a performance framework that is compensatory in nature.

As such, schools and districts will be classified on a spectrum of performance, with points accumulated across multiple metrics, and will be subsequently labeled each year using a Five-Star Scale to differentiate between the highest and lowest levels of performance.

In response to the need of each school and district, the State has designed recognition opportunities, accountability requirements, and support mechanisms that appropriately match each system's performance. In order to leverage substantial improvement in the lowest performing schools and districts, the State will provide intensive intervention and support opportunities. This comprehensive approach is developed with the intent that all schools and districts will ultimately meet high expectations and move across the Five-Star Scale into the highest levels of performance (i.e., Four- and Five-Star Status).



**PRINCIPLE 3: SUPPORTING EFFECTIVE INSTRUCTION AND LEADERSHIP**

**3.A DEVELOP AND ADOPT GUIDELINES FOR LOCAL TEACHER AND PRINCIPAL EVALUATION AND SUPPORT SYSTEMS**

Select the option that pertains to the SEA and provide the corresponding description and evidence, as appropriate, for the option selected.

<b>Option A</b>	<b>Option B</b>	<b>Option C</b>
<input type="checkbox"/> If the SEA has not already developed any guidelines consistent with Principle 3, provide: <ul style="list-style-type: none"> <li>i. the SEA's plan to develop and adopt guidelines for local teacher and principal evaluation and support systems by the end of the 2011–2012 school year;</li> <li>ii. a description of the process the SEA will use to involve teachers and principals in the development of these guidelines; and</li> <li>iii. an assurance that the SEA will submit to the Department a copy of the guidelines that it will adopt by the end of the 2011–2012 school year (see Assurance 14).</li> </ul>	<input checked="" type="checkbox"/> If the SEA has already developed and adopted one or more, but not all, guidelines consistent with Principle 3, provide: <ul style="list-style-type: none"> <li>i. a copy of any guidelines the SEA has adopted (Attachment 10) and an explanation of how these guidelines are likely to lead to the development of evaluation and support systems that improve student achievement and the quality of instruction for students;</li> <li>ii. evidence of the adoption of the guidelines (Attachment 11);</li> <li>iii. the SEA's plan to develop and adopt the remaining guidelines for local teacher and principal evaluation and support systems by the end of the 2011–2012 school year;</li> </ul>	<input type="checkbox"/> If the SEA has developed and adopted all of the guidelines consistent with Principle 3, provide: <ul style="list-style-type: none"> <li>i. a copy of the guidelines the SEA has adopted (Attachment 10) and an explanation of how these guidelines are likely to lead to the development of evaluation and support systems that improve student achievement and the quality of instruction for students;</li> <li>ii. evidence of the adoption of the guidelines (Attachment 11); and</li> <li>iii. a description of the process the SEA used to involve teachers and principals in the development of these guidelines.</li> </ul>



	<ul style="list-style-type: none"><li>iv. a description of the process used to involve teachers and principals in the development of the adopted guidelines and the process to continue their involvement in developing any remaining guidelines; and</li><li>v. an assurance that the SEA will submit to the Department a copy of the remaining guidelines that it will adopt by the end of the 2011–2012 school year (see Assurance 14).</li></ul>	
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### **PRINCIPLE 3 – INTRODUCTION**

This section primarily provides an overview of work already done in Idaho around teacher evaluation, the efforts to strengthen evaluations for continuous improvement, and the processes in place to create a system for administrator evaluation:

Idaho has created, and continues to develop, statewide frameworks for performance evaluations that use multiple measures to improve the craft of teaching and instructional leadership at all levels. Under Students Come First, at least 50 percent of teacher and administrator performance evaluations must be based on student achievement. Two other required measures of educator performance are parental input and observation.

Districts must make sure that parent input is included on teacher and school-based administrator performance evaluations going forward. This data must be considered as part of the overall evaluation, however, districts have local control over by what means they collect and at what percentage they calculate parent information into the evaluation equation. Additionally, every school district is currently using the Statewide Framework for Teacher Performance Evaluations, based on the Danielson Framework for teaching. The states goal is to increase the frequency of interaction between teachers and administrators around this model, and ensure that data gathered from evaluations informs ongoing professional growth.



Currently, the Idaho State Department of Education is working with educational stakeholder groups to develop the specifics of a statewide framework for administrator evaluations to ensure this goal.

One of the priorities of the State is to emphasize the principal's role as an instructional leader who is proficient in assessing teacher performance and carrying out reflective conversations to promote each teacher's growth. This work is underway and should be completed by May 2012. Once established, the State intends to use this framework to make necessary changes within administrator preparation programs, and to implement Individual Professional Performance Plans for both teachers and administrators prior to initial certification.

*3.A.i The SEA has developed and adopted one or more, but not all, guidelines consistent with Principle 3.i. Explanation of how these guidelines are likely to lead to the development of evaluation and support systems that improve student achievement and the quality of instruction for students:*

In March 2011, Idaho lawmakers enacted Students Come First; a significant new law mandating unprecedented change for the State's K-12 schools. One of the three foundational pillars underlying Students Come First is dedicated to developing great teachers and leaders in Idaho, with the goal for every student to have a highly effective teacher every year of his or her schooling. At the center of this pillar is an emphasis on teacher and administrator evaluations.

These evaluations build on Idaho's past work to create a Statewide framework for teacher performance evaluations to further ensure that all educator evaluations involve multiple measures, with at least 50 percent of the evaluation based on growth in student learning. The landmark legislation provides for the following (see Idaho Code 33-513 through 33-515 and 33-1004I). <http://legislature.idaho.gov/legislation/2011/S1108.pdf> and <http://legislature.idaho.gov/legislation/2011/S1110.pdf>:

- Educators will be evaluated based on their impact on student growth, with not less than 50 percent of academic growth accounting for an educator's total evaluation;
- Evaluation will serve as a basis for making decisions in the areas of hiring, compensation, promotion, assignment, professional development, earning and retaining non-probationary status, and non-renewal;
- Annual performance evaluations will be made for all teachers and principals; and,
- Forced placement of teachers is prohibited. This means that no building administrator may be forced to employ a teacher released or otherwise displaced from another school within the district.

A timeline outlining key events in the development and confirmation of adoption of Idaho's educator evaluation policy is included as Attachment 10.



The events included in this timeline illustrate a comprehensive plan that will likely lead to the development of evaluation and support systems that increase the quality of instruction for students and improve student achievement. Attachments 10 and 11 provide evidence of Idaho's commitment to a rigorous and relevant evaluation system reflected in policy changes in all phases; from full implementation to proposed rule. Together, these changes represent a comprehensive system for evaluation that will be used for continual improvement of instruction and will meaningfully differentiate educator performance using multiple, valid measures and emphasizing student growth.

- i. *Evidence of the adoption of the guidelines (Attachment 11):*
  - Students Come First-Proposed revisions to Idaho Code 33-513 through 33-515:
    - <http://legislature.idaho.gov/legislation/2011/S1108.pdf>
- iv. Students Come First-Proposed revisions to Idaho Code 33-1004I:
  - <http://legislature.idaho.gov/legislation/2011/S1110.pdf>
  - Finalized Idaho Code 33-513 through 33-515 and Idaho Code 33-1004I
    - <http://legislature.idaho.gov/idstat/Title33/T33CH5SECT33-513.htm>
    - <http://legislature.idaho.gov/idstat/Title33/T33CH5SECT33-514.htm>
    - <http://legislature.idaho.gov/idstat/Title33/T33CH5SECT33-514A.htm>
    - <http://legislature.idaho.gov/idstat/Title33/T33CH5SECT33-515.htm>
    - <http://legislature.idaho.gov/idstat/Title33/T33CH10SECT33-1004I.htm>
  - Idaho Administrative Rule - IDAPA 08.02.02.120
- ii. *The SEA's plan to develop and adopt the remaining guidelines for local teacher and principal evaluation and support systems by the end of the 2011–2012 school year:*

The teacher evaluation guidelines were adopted by the Idaho Legislature in March 2011. Development and adoption of the administrator evaluation guidelines will follow the same process, with recommendations going to the State Board of Education in April 2012. The ISDE and educational stakeholder groups have discussed administrator evaluation since Idaho developed a Statewide Framework for Teacher Performance. In May 2008, the first task force was charged to develop “minimum Statewide standards for a fair, thorough, consistent and efficient system for evaluating teacher performance in Idaho.” They completed their work in April 2009 but in December 2011, the ISDE convened a Focus Group to start work in the area of crafting a Statewide Framework for Administrator Performance.

In the first few months of this work, all stakeholders have shown strong support for the development of a rigorous framework for administrator evaluation; thus; suggesting successful adoption of the related/necessary policies in the 2011-2012 school year.



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ISDE held its first meeting with representatives from educational stakeholder groups on December 15, 2011. Participants included:

- Administrators from both large urban and small rural districts
- Public School Teachers
- Central District Staff- Directors of Curriculum and Special Education
- Idaho Education Association President
- School board trustees from both large urban and small rural districts
- Higher education representatives
- Idaho PTA representative
- Office of the State Board of Education representative
- Office of the Governor representative
- Senator John Goedde, Idaho Legislature
- Senator James Hammond, Idaho Legislature
- Senator Steve Bair, Idaho Legislature

(See Attachment 15 - Meeting Minutes from December 15, 2011)

This Focus Group will continue to meet once monthly. ISDE has created a webpage at <http://www.sde.idaho.gov/site/teacherEval/> where interested stakeholders and members of the public can track the group's progress, find links to the research and provide feedback to group members. The group plans on concluding its work by May 2012.

In addition to the Focus Group, ISDE has formed a smaller working group that will also meet monthly to plan for the larger group meetings and specifically craft related State's policy based on stakeholder feedback. The smaller working group consists of the Executive Director of the Idaho Association of School Administrators, the Executive Director of the Idaho School Boards Association, the Executive Director of the Idaho Education Association, and ISDE staff.

(See Attachments 15 and 16 - Meeting Minutes from November 2011 and January 2012 meetings.)

The work of the Administrator Evaluation Focus Group has been completed. The State Board of Education will have received an informational summary of the recommendations from the Administrator Evaluation Focus Group at the June 2012 meeting. Those recommendations will have been formally converted into a proposed rule based on feedback from the board which will be brought back to the board at the August 2012 meeting (See Attachment 2931). Throughout the process, the Administrator Evaluation Focus Group has made every effort to keep all stakeholders apprised of the work, and provide opportunities for feedback. While a number of principals and their association representatives have been directly involved in the work of the focus group, information has been disseminated to all administrators statewide updating them on the work of the focus group and the recommendations that will be made to the state board.



- iii. *Description of the process used to involve teachers and principals in the development of the adopted guidelines and the process to continue their involvement in developing any remaining guidelines:*

Idaho values stakeholder input, even beyond teachers and principals, in developing evaluation policy, and will continue to provide avenues for input in developing remaining guidelines.

In Fiscal Year 2009, \$50,000 was legislated to fund the research and development activities of the Teacher Evaluation Task Force as briefly referenced above. The task force was comprised of key stakeholders from across Idaho who shared a desire to improve education through a consistent set of statewide standards for teacher evaluation.

Teachers, parents, school administrators, school board trustees, legislators, and representatives of higher education were involved in the Teacher Performance Evaluation Task Force. The task force met initially in May 2008 with the charge of “developing minimum statewide standards for a fair, thorough, consistent and efficient system for evaluating teacher performance in Idaho.”

(See Attachment 17 - 2010 Legislative Report on the Teacher Performance Evaluation Task Force)

<http://www.sde.idaho.gov/site/teacherEval/docs/implementation/2010%20Legislative%20Report%20-%20Teacher%20Evaluation.pdf>.

Key findings of the Teacher Evaluation Task Force included:

1. Idaho lacked consistency, reliability and validity in measuring teacher performance. Both the standards and procedures by which teachers were being evaluated lacked consistency from one school district to the next and often within a district from one school to another.
2. Many teachers expressed concern about the quality, fairness, consistency, and reliability of teacher evaluation systems that were being used.
3. Many school districts had spent considerable resources creating robust, research-based teacher performance evaluation models (but disparate) that were developed with stakeholders involvement.
4. Idaho’s school administrator preparation programs needed to focus more on the supervision and evaluation of teachers in a purposeful, consistent way.
5. A majority of Idaho’s school districts were utilizing a teacher performance evaluation model based on Charlotte Danielson’s Framework for teaching domains and components of instruction.
6. Idaho’s Core Teaching Standards, used in pre-service teacher education and key to the ongoing professional development for practicing teachers, were aligned with Charlotte Danielson’s Framework for teaching domains and components of instruction.



Based on task force recommendations, the Idaho State Board of Education and Idaho Legislature subsequently approved administrative rule changes to adopt a Statewide Framework for Teacher Performance Evaluations in Idaho in January 2009. (See Attachment 18 – Idaho Administrative Rule IDAPA 08.02.02.120, <http://adm.idaho.gov/adminrules/rules/idapa08/0202.pdf>.) The following timeline for implementation of the new Idaho teacher performance evaluation standards was then adopted and executed:

- Summer 2009: The Idaho State Department of Education began offering trainings and technical assistance on teacher performance evaluation standards. These trainings were part of the technical assistance provided by ISDE designed to assist school districts in the implementation of their new evaluation models.
- 2009-10 school year: Districts and public charter schools worked with educational stakeholders to develop evaluation models.
- February 2010: Districts and public charter schools submitted their proposed models for State approval. The adopted model had to be signed by representatives from the Board of Trustees (school board members), administrators, and teachers. If a school district or public charter school was not prepared to submit their evaluation model and policy for review at that time, the ISDE had to have received evidence that progress was being made toward Fall 2011 implementation. These districts and public charter schools had to submit a letter outlining progress along with a timeline for completion.
- Fall 2010: At a minimum, districts and public charter schools had to begin piloting their approved Teacher Performance Evaluations:
  - i. Districts and public charter schools were required to submit an interim progress report to ISDE regarding plan implementation.
  - ii. A waiver process was afforded for districts and public charter schools showing evidence of progress but needing additional time before piloting.
- Fall 2011: Full implementation of the teacher evaluation model.

***Technical Assistance Provided by ISDE:***

Beginning in 2010-2011, ISDE provided technical assistance to school districts and public charter schools in their efforts to implement the new teacher evaluation requirements. This technical assistance included:

- Six face-to-face regional workshops on the Charlotte Danielson Framework. The workshops were designed for school administrators and focused on giving them a deeper understanding of the Charlotte Danielson Framework and how to use the framework for teacher evaluation purposes.



- A contract with Educational Impact to provide 24-hour access to online video-based professional development to all public school teachers and administrator to support understanding of the Charlotte Danielson Framework. This online training was designed to help teachers and administrators better understand the basics of the Framework.
- A second contract with Educational Impact was authorized for the purpose of developing a custom training program targeted specifically at administrators. The training centered on how to use the Danielson Framework for evaluation purposes, including examination of performance artifacts and best practices in conducting pre- and post-observation conferences. The program allows administrators to view video footage of teachers in the classroom and practice evaluating teacher performance.
- A website remains posted with links to sample school district evaluation models, sample policy language, rubrics, evaluation tools, and other guidance that can be utilized by districts as they work to develop and revise their own models.

Idaho believes that these measures have, and will continue to, significantly contribute to the development of a more able Statewide teaching workforce; one that, in turn, will be better prepared to support improved student achievement. Ongoing implementation of support allows the ISDE to continue to gather feedback about staff development needs around the State.

ISDE is currently involving teachers, school administrators, legislators, and other significant stakeholder group representatives in the development of guidelines and examples of multiple measures to assess teacher effectiveness in non-tested grades and subject areas. In April 2012, a presentation to the Evaluation Capacity Task Force by a national expert from the National Comprehensive Center on Teacher Quality presented practices being used across the states to provide research and options for initial Idaho recommendations to districts. Ultimately, in accordance with Idaho Administrative Procedures Act (IDAPA) 08.02.02.120, each LEA evaluation policy must include provisions for allowing opportunities for input and ongoing review from those affected by the evaluation; i.e., trustees, administrators and teachers. Therefore these guidelines and examples to assess teacher effectiveness in non-tested grades and subject areas will be reviewed at the local level by all stakeholders prior to adoption by the LEA. With the revisions being proposed to IDAPA 08.02.02.120, a portion of the 50% of a teacher's evaluation that is based on growth in student achievement must be based on growth as determined by the Idaho Student Achievement Test (ISAT) and Idaho's growth model. Since Idaho is a local control state, Local stakeholders have the authority to adopt additional growth measures that meet their unique needs and that will be differentiated based on the subject and grade level being taught. Once approved by the LEA, the revised plans will be submitted to the ISDE for review and approval for alignment to Idaho statute and administrative rule.



To solicit feedback at the state level beyond the initial role of the Capacity Task Force, all aspects of evaluation systems and models for assessing teacher effectiveness will be reviewed and revised (as necessary) even after formal adoption.

The ~~first~~ formal State Board approval of ~~state~~ these recommendations for appropriate measures will take place at the ~~is projected for~~ August 2012 board meeting and legislative approval will follow in spring 2013. Following that, the State's Professional Standards Commission shall form an additional subcommittee to work with the State's evaluation coordinator to provide ongoing review and inform appropriate revisions of the State's frameworks for educator evaluation.

The next steps in a unified effort to solidify Idaho's policy commitment to supporting great teachers and leaders to bring about improved student achievement includes creating policy for administrator evaluations in much the same way described above for teacher evaluations. ISDE is currently involving teachers, school administrators, and legislators, and other significant stakeholder group representatives in the development of the administrator evaluation, discussed in detail above. This work and a timeline for other statewide initiatives are outlined in Table 38.



**3.A DEVELOP AND ADOPT GUIDELINES FOR LOCAL TEACHER AND PRINCIPAL EVALUATION AND SUPPORT SYSTEMS**

**Table 38  
Develop & Adopt Guideline for Local Teacher and Principal Evaluation & Support Systems**

<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
Develop a statewide definition and standards for "effective" teachers	Spring 2012-Fall 2012	Administrator Evaluation Focus Group, SEA, via Idaho Department of Education	Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified.	Limited timeframe and funding at this time
Develop language for Administrative Rule concerning observations of novice or partially proficient teachers at least twice annually, while other staff submit formative observations and evaluative discussions at least twice per year. These observations and evaluative discussions shall be used as data in completing the teacher's one evaluation as is outlined and required by State Statute 33-514	Spring 2012-Fall 2012	Administrator Evaluation Focus Group, SEA, via Idaho Department of Education	Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
State and stakeholders shall create a sample calendar with suggested timeframe for evaluation and types of data to be collected which will meet state approval to draw fair and consistent results.	Spring 2012-Summer 2012	Administrator Evaluation Focus Group, Idaho Department of Education  Evaluation Capacity Taskforce	Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time
ISDE convenes stakeholder group to define a framework for evaluating administrators to be adopted statewide. This group is titled the <i>Administrator Evaluation Focus Group</i> . The core/small team consists of ISDE Staff members along with educators associations. The larger focus group includes the core team and various stakeholders within Idaho	November 2011-May 2012	Administrator Evaluation Focus Group, Idaho Department of Education	Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<ol style="list-style-type: none"> <li>1. Together with Administrator Focus Group generate statewide definition and standards for "effective" school administrators</li> <li>2. Administrator Focus Group will establish a framework for evaluating school administrators that includes multiple measures that also includes 50 percent of the evaluation based upon student growth and achievement</li> <li>3. The Administrator Focus Group will design an administrator evaluation framework heavily focused on Instructional Leadership</li> <li>4. Establish the requirement of an individualized administrator evaluation rating system with a ranking of not proficient, basic, proficient, and distinguished that is transparent and reliable developed with the Administrator Focus Group</li> </ol>	December 2011-May 2012	Administrator Evaluation Focus Group, Idaho Department of Education	Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<ol style="list-style-type: none"> <li>ISDE and stakeholders will determine a systemic way to monitor and support a process for ensuring that all measures that are included in determining performance levels are valid measures, e.g. measures that are clearly related to increasing student academic achievement and school performance, (including measures in non-tested subjects and grades)</li> <li>Stakeholders shall also create framework for policy to ensure that evaluation measures are implemented in a consistent and high-quality manner across schools within a District</li> </ol>	March-May, 2012	Administrator Evaluation Focus Group, Evaluation Capacity Taskforce, Idaho Department of Education	Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting Attachment 16 Minutes from large Administrator Evaluation Focus Group	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<p>1. Develop a Professional Performance Plan for Principals that will hold them accountable for progress in addressing inter-rater reliability</p> <p>2. Principal professional performance plans will include goals addressing school climate and working conditions, developed with reference to a working conditions or school leadership survey. The intent is that this process will allow educators to give feedback on the professional development they receive and will help principals monitor and ensure that educators have access to appropriate and high quality professional development</p>	January-May, 2012	Administrator Evaluation Focus Group, Idaho Department of Education	<p>Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting</p> <p>Attachment 16 Minutes from large Administrator Evaluation Focus Group</p>	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
(cont'd) 3. Create framework for districts to continually monitor principal performance goals, provide feedback, and adjust support for the principal as needed  4. Produce language in Administrative Rule (or Statute) to hold principals accountable for progress against goals laid out in the principal's Professional Performance Plan that addresses inter-rater reliability  5. Create a framework for districts to continually monitor principal performance goals, provide feedback, and adjust support for the principal as needed					



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
1. Professional Performance Plan Framework shall be created for educators that will form the basis of subsequent evaluations and allow districts to assess growth and development.  2. Create language in Administrative Rule (or Statute) for Professional Performance Plan Framework that will form the basis of subsequent evaluations and allow districts to assess growth and development	January-June 2012	Administrator Evaluation Focus Group, Idaho Department of Education	Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting  Attachment 15 Minutes from large Administrator Evaluation Focus Group	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<ol style="list-style-type: none"> <li>1. Create a theory of action and an action plan that identifies a systemic way to monitor and support a process for ensuring that all measures that are included in determining performance levels are valid measures, e.g. measures that are clearly related to increasing student academic achievement and school performance, (including measures in non-tested subjects and grades)</li> <li>2. Create a framework for policy to ensure that evaluation measures are implemented in a consistent and high-quality manner across schools within all Districts</li> <li>3. Using current research, create a list of options and strategies for use by Idaho educators that will provide meaningful feedback and encourage timely support to educators to improve their practice</li> </ol>	January-August 2012	<p>Evaluation Capacity Taskforce</p> <p>Administrator Evaluation Focus Group</p> <p>Idaho Department of Education</p>	<p>Attachment 15 Agenda from Dec 15, 2011 Administrator Evaluation Focus Group Meeting</p> <p>Attachment 16 Minutes from large Administrator Evaluation Focus Group</p>	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
1. Present proposal to State Board concerning the framework for evaluating school administrators that includes multiple measures, to include 50 percent of the evaluation based upon student growth  2. Provide recommendations to State Board concerning the requirement of an individualized administrator evaluation rating system with a ranking of not proficient, basic, proficient, and distinguished that is transparent and reliable	May-June 2012	Evaluation Capacity Taskforce  Administrator Evaluation Focus Group  Idaho Department of Education	Attachment 15 Agenda from Dec 15, 2011  Administrator Evaluation Focus Group Meeting   Attachment 16 Minutes from large Administrator Evaluation Focus Group	Three ISDE Staff members along with educators associations will coordinate and facilitate focus group meetings where standards will be identified	Limited timeframe and funding at this time
Public comment period pertaining to the sample calendar with suggested timeframe for evaluation and types of data to be collected which will meet state approval to draw fair and consistent results	Fall 2012	ISDE	Attachment 18 IDAPA 08.02.02.120	ISDE Staff Time  Necessary but unknown at this time	Resources for Technical Assistance and Support



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
Public comment period of Performance Plan Framework that will form the basis of subsequent evaluations and allow districts to assess growth, development and achievement	Fall 2012	ISDE	Attachment 18 IDAPA 08.02.02.120	ISDE Staff Time  Additional funding necessary but amount unknown at this time	Resources for Technical Assistance and Support
Public comment period concerning Principals being held accountable for progress against goals laid out in the principal's Professional Performance Plan that addresses inter-rater reliability	Fall 2012	ISDE	Attachment 18 IDAPA 08.02.02.120	ISDE Staff Time  Additional funding necessary but amount unknown at this time	Resources for Technical Assistance and Support
Public comment period concerning observations of novice or partially proficient teachers at least twice annually, while other staff submit to formative observations and evaluative discussions at least twice per year  These observations and evaluative discussions shall be used as data in completing the teacher's one evaluation as is outlined and required by State Statute 33-514	Fall 2012	ISDE	Attachment 18 IDAPA 08.02.02.120	ISDE Staff Time  Additional funding necessary but amount unknown at this time	Resources for Technical Assistance and Support



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<b>Next Steps in Strengthening Idaho's Teacher and Administrator Evaluation Policy</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<p>Public Comment period concerning the Administrator Focus Group determinations concerning:</p> <ol style="list-style-type: none"> <li>1. statewide definition &amp; standards for "effective" school administrators</li> <li>2. framework for evaluating school administrators that includes multiple measures that also includes 50 percent of the evaluation based upon growth in student achievement</li> <li>3. administrator evaluation framework heavily focused on Instructional Leadership</li> <li>4. the requirement of an individualized administrator evaluation rating system with a ranking of not proficient, basic, proficient, and distinguished that is transparent and reliable developed with the Administrator Focus Group</li> </ol>	Fall 2012	ISDE	Attachment18 IDAPA 08.02.02.120	ISDE Staff Time  Additional funding necessary but amount unknown at this time	Resources for Technical Assistance and Support



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<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
(cont'd) 5. systemic way to monitor and support a process for ensuring that all measures that are included in determining performance levels are valid measures, e.g., measures that are clearly related to increasing student academic achievement and school performance, (including measures in non-tested subjects and grades)					
1. All districts and public charter schools must adopt a policy to include student achievement data as part of their evaluation models for superintendents, assistant superintendents, directors, principals, other district administrative employees and certificated employees	After June 30, 2012	ISDE	Attachment 18 IDAPA 08.02.02.120	ISDE Staff Time  Additional funding necessary but amount unknown at this time	Resources for Technical Assistance and Support



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<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
Continued implementation of Idaho Mentor Network with the addition of mentoring for administrators: <ul style="list-style-type: none"> <li>a. Planning and Designing Professional Development for New Teachers and Mentoring for Equity</li> <li>b. Continue coursework for Consulting Teacher Endorsement</li> </ul>	School Year 2012-2013	ISDE	Attachment 19 Executive Summary for Mentors  Attachment 20 Leading the Framework for Teaching Action Plan	SPDG Grant, Title IIA funds	Managing continuing capacity  Continued funding source

v. *The SEA has checked Assurance 14.*



*3.A.ii Teacher and principal evaluation and support systems for which the SEA has developed and adopted guidelines, consistent with Principle 3, are systems that meet the specified waiver criteria:*

Idaho's current educator evaluation system meets the basic waiver elements set forth in 3.A.ii a-f. It is important to note, however, that all of Idaho's related legislation recognizes the need for flexibility in a State that is deeply committed to local control. Clarification of the degree of flexibility allowed in order to maintain the balance between consistency across the State and recognition of districts' unique needs is addressed through the rules promulgation process. Further definition of evaluation processes and timelines will be added to Idaho Administrative Rules prior to full implementation in school year 2014-15. Each element is outlined in Table 3.A.ii(a) *Implementation Timeline for Proposed Rule Changes* included at the end of this section.

The evaluation systems established for Idaho educators will promote reflective practice and the development of ongoing, personalized professional development plans leading to improved support for turning around low-performing schools and measurably increased student achievement for all students.

*a. Idaho's Educator Evaluation System will be used for continual improvement of instruction.*

The teacher evaluation model set forth under IDAPA 08.02.02.120 was adopted in 2010 (<http://adm.idaho.gov/adminrules/rules/idapa08/0202.pdf>). A significant portion of teacher evaluation is a performance assessment, based upon the *Danielson Framework for Effective Teaching*. Administrative rules specifically address using this evaluation model for the purpose of improving instructional practices. Subsections m and n require school districts to report the following to ISDE in order to receive evaluation plan approval:

- i. Collecting and using data -- a plan for collecting and using data gathered from the evaluation tool used to inform professional development.
- ii. A plan for how evaluations will be used to identify proficiency and define a process that identifies and assists individual educators in need of improvement.

Idaho's longitudinal data system, *Idaho System for Educational Excellence (ISEE)*, allows administrators to track teacher evaluations over time, and to assess the student achievement gains that may result from targeted professional development for teachers. In addition, Administrative rules charge each administrator with the responsibility for being trained in personnel evaluation and districts must commit to ongoing training and funding as follows:

- i. Evaluator -- identification of the individuals responsible for appraising or evaluating certificated personnel performance. The individuals assigned this responsibility should have received training in evaluation.



- ii. Professional development and training -- a plan for ongoing training for evaluators/administrators and teachers on the districts evaluation standards, tool and process.
- iii. Funding – a plan for funding ongoing training and professional development for administrators in evaluation.

Additionally throughout Principal 2, teacher and administrator evaluations are connected to school improvement plans. Teacher and administrator performance evaluations in Idaho already require a strong tie to student performance metrics (at least 50%). The State will require One- and Two Star schools to demonstrate how teacher and administrator evaluations enhance their improvement plans by embedding the concepts in the Rapid Improvement and Turnaround Plans.

*b. Idaho's Educator Evaluation System meaningfully differentiates performance using at least three performance levels.*

ISDE developed regulations found in IDAPA 08.02.02.120 specifically to support teachers in continual improvement of instructional practices. Currently, school districts are required only to report teacher performance evaluation information in the aggregate as “proficient” or “not proficient.” However, ISDE has since begun work on revised rules that will be legislatively approved in January 2013. Revised Idaho Administrative Rule language will require districts to implement a four-tiered rating system by the 2013-14 school year. Under the rule change, there would be four performance levels for all teachers: not proficient, basic, proficient, or distinguished. Additionally, administrator evaluations shall be reported using the same four-tiered ranking system.

*c. Idaho's Educator Evaluation System will use multiple valid measures in determining performance levels, including as a significant factor data on student growth for all students (including English Learners and students with disabilities), and other measures of professional practice (which may be gathered through multiple formats and sources, such as observations based on rigorous teacher performance standards, teacher portfolios, and student and parent surveys).*

Currently, Idaho’s Students Come First legislation enacted in 2011, requires that teacher performance evaluations be based upon multiple measures to include, at minimum:

1. Growth in student achievement data (Idaho Code 33-513 through 33-415B) to be weighed at not less than 50 percent in the evaluation of every educator
2. Teacher observations using the Danielson Framework for Effective Instruction (IDAPA 08.02.02.120.)
3. Parental Input (Idaho Code 33-513)



Idaho is also in the process of rewriting State policies to include these requirements through Administrative Rule:

1. Multiple measures must be used to evaluate teacher performance. (State shall create a menu of State-approved measures. Preliminary work based upon NCCTQ Research, Attachment 21 - Alternative Measures of Teacher Performance
2. Data must be gathered with sufficient frequency to provide a basis for the evaluation. (State shall create a definition for “Sufficient Frequency” and develop a sample calendar for guidance)

The State is additionally exploring effective measures related to special student population to further inform teacher evaluation policies. A primary goal for Idaho is to ensure that highly effective teachers are in place throughout the public school system, especially for our most difficult to teach students. In order for the SDE to identify effective teachers, it is first necessary to define “highly effective” teaching and then to develop efficient and practical tools to measure it in the context of special education.

The Special Educator Evaluation Project focuses on these important tasks. Beginning with the most complex issue in measurement and assessment of teacher evaluation systems (i.e. special education), this project will provide critical information and insight to some of the most difficult measurement, practical and political issues that can inform the scaling up of such a system to other certification and endorsement areas. This project is under the direction of Dr. Evelyn Johnson, in partnership with the ISDE, Boise State University, and the Lee Pesky Learning Center.

The purpose of this project, under the direction of Dr. Evelyn Wood is to develop a special educator evaluation tool that a) directly links to student outcomes; b) is grounded in Danielson’s domains; c) consists of multiple sources of data; and d) provides a system for collaboration among IHE special educator preparation programs, districts, the Idaho SDE, and the National Comprehensive Center for Teacher Quality.

To accomplish this goal, we will focus on two primary objectives:

1. Develop a definition of special educator efficacy
2. Support the state’s development of a teacher evaluation system by informing the components specific to special education teachers

Participants were recruited by coordinating with existing state projects such as the New Teacher Project, State Mentor Network and graduates of state special education preparation programs.

Developing such a special education evaluation model will enable the Idaho State Department of Education to align certification standards, teacher preparation, teacher evaluation and school improvement consistent with the guidelines for a comprehensive teacher evaluation system.



- (i) *The SEA has a process for ensuring that all measures that are included in determining performance levels are valid measures, meaning measures that are clearly related to increasing student academic achievement and school performance, and are implemented in a consistent and high quality manner across schools within an LEA:*

In March 2012, a workgroup comprised of key ISDE staff, external stakeholders and consultants from the Northwest Regional Comprehensive Center will form an Evaluation Capacity Taskforce that will determine a systemic way to monitor and support a process for ensuring that all measures that are included in determining performance levels are valid measures, and can be implemented in a quality manner.

This group will focus on the development of a theory of action linked to measuring performance for both teachers and principals, supporting related professional development, and creating a process for the ISDE to monitor school district's educator evaluation systems. The goal of the group will be to produce a Statewide system of support and accountability to ensure consistent and sustainable implementation of valid evaluation systems.

This Evaluation Capacity Task Force will also vet various measure for grades and subjects in which assessments are not required under ESEA section 1111(b)(3), and provide a menu of options for districts to begin piloting by the 2013-14 school year.

No later than August 2012, policy created by the Evaluation Capacity Taskforce will be presented for preliminary approval through the State Board of Education. Subsequently, following the rules promulgation process, the proposed policy will go out for a period of public comment in Fall 2012. Formal Legislative approval is expected to follow in Spring 2013. This timeframe will allow districts to pilot an evaluation model incorporating all of the related statutory and administrative rule changes in the 2013-14 school year. ISDE will require that each district's plan be submitted to the State no later than January 2014 to be reviewed and approved. Each plan must include evaluation processes and specific measures for both teacher evaluation and administrator evaluation. ISDE monitoring of school district plans will begin in Fall 2015.

- (ii) *For grades and subjects in which assessments are required under ESEA section 1111(b)(3), the SEA defines a statewide approach for measuring student growth on these assessments:*

State Superintendent Tom Luna has long been an advocate for including student academic growth measures in gauging the success of schools and teachers.



To gain a more robust assessment of how our schools, teachers, and students are performing, Idaho will supplement proficiency scores with a new form of accountability—one that recognizes and rewards academic growth in addition to achievement. This is Idaho’s Growth Model.

Idaho’s Growth Model is the Student Growth Percentiles (SGP) framework created by Damian Betebenner and utilized by the state of Colorado. The goal of including growth in Idaho’s assessments is to maximize student progress toward college- and career-readiness. To help ensure that all students are college- and career-ready by the time they exit high school, both a definition of “readiness” and a comprehensive measurement system are needed in order to determine how well students are progressing toward that goal.

The growth model adds value to proficiency assessments because it takes into account where a student starts the year academically. By grouping students who perform similarly at the beginning of the year, we can compare a student’s growth against that of his/her academic peers over time. Idaho has also adopted a metric to ensure adequate growth to a standard. As outlined in Section 2.A.i. the Adequate Student Growth Percentile will illustrate if a student has made sufficient growth to reach proficiency within three years or by 10<sup>th</sup> grade, whichever comes first.

(iii) *For grades and subjects in which assessments are not required under ESEA section 111(b)(3), the SEA plans to provide guidance to LEAs on what measures of student growth are appropriate, and establishes a system for ensuring that LEAs will use valid measures:*

ISDE will convene an Evaluation Capacity Taskforce, referenced above in 3.A.c(iii). This task force will vet various means of measuring student growth in grades and subjects in which assessments are not required under ESEA section 111(b)(3), and provide a menu of options for districts to begin piloting by the 2013-2014 school year. The Taskforce shall use as a foundation NCCTQ’s “Measuring Teachers’ Contributions to Student Learning Growth for non-tested Grades and Subjects” research and policy brief on <http://www.tqsource.org/publications/MeasuringTeachersContributions.pdf>).

Once the menu of options for assessment becomes available, districts will include each measure to be used for each subject and grade as a requirement for state approval of the LEA’s evaluation plan. Final evaluation plans must be submitted to the ISDE no later than Spring 2014. LEAs that do not use state approved menu options will need to provide rationale and research to support their choice. ISDE monitoring of LEA measures and implementation shall begin in Spring 2015.



*d. Idaho's Educator Evaluation System will require the evaluation of teachers and principals on a regular basis.*

Educators are required to receive a performance evaluation annually according to Idaho Code 33-514):

There shall be a minimum of one (1) written evaluation in each of the annual contract years of employment, the first portion of which shall be completed before February 1 of each year, and shall include input from parents and guardians of students as a factor. A second portion shall be included for all evaluations conducted after June 30, 2012. This second portion shall comprise at least fifty percent (50%) of the total written evaluation and shall be based on objective measure(s) of growth in student achievement. The requirement to provide at least one (1) written evaluation does not exclude additional evaluations that may be performed.

By June 30, 2013, the state will additionally create guidelines for when, and what types of data, should be collected on a regular basis to provide enough information to draw fair and consistent results with respect to the evaluation of teachers and administrators. Revisions to policy shall require that novice or partially proficient teachers shall be observed at least twice annually, and that all other staff shall submit to, at least, two formative observations and/or evaluative discussions within the school year. These observations and evaluative discussions shall be used as data in completing the teacher's one evaluation as is outlined and required by State Statute 33-514.

*e. Idaho's Educator Evaluation System will provide clear, timely, and useful feedback, including feedback that identifies needs and guides professional development.*

To ensure that the feedback informing professional development is meaningful, Idaho will design an administrator evaluation framework heavily focused on Instructional Leadership. The standards for, and definition of, an effective principal will articulate how they should lead and support instructional improvements in their buildings. In December 2011, the ISDE convened a Focus Group to start work in the area of crafting a Statewide Framework for Administrator Performance. These stakeholders will meet monthly through the Spring, and have shown strong support for the development of a rigorous framework for administrator evaluation.

The plan is to adopt temporary and proposed rule to immediately enforce policies in time to pilot administrator evaluation measures in the 2012-13 school year.

Additionally, current Administrative Rule IDAPA 08.02.02.120 requires districts to provide, for State approval, a "plan for how evaluations will be used to identify proficiency and define a process that identifies and assists teachers in need of improvement." Plans under previous statute and rule have already been approved,



but another round of approvals will be necessary once all new statewide guidelines have been formally adopted.

To further ensure that evaluation results clearly guide professional development, proposed administrative rule changes will go forth in April 2012, and will include the following language under subsection 05(n):

*No later than March 01, 2014, districts shall have established an individualized teacher evaluation rating system with a ranking of not proficient, basic, proficient, and distinguished . Districts shall ensure that an Individualized Professional Performance Plan is created for each teacher based upon evaluation findings, and to be used in subsequent years as the baseline measurement for professional development and growth.*

Similar language pertaining to Individualized Professional Performance Plans will appear in administrative rule guiding the evaluation of administrators (See Attachment 23 - Proposed Board Rule Change, discussed in greater depth in Section 3B).

*SEA guidelines will ensure that evaluations occur with a frequency sufficient to ensure that feedback is provided in a timely manner to inform effective practice:*

As stated above, Idaho code is being revised to include guidance for when and what types of data might be collected on a regular basis to provide enough information to draw fair and consistent results with respect to the evaluation of teachers and administrators. State policy will require that all staff submit to a minimum of two formative observations and evaluative discussions per year. These observations and evaluative discussions shall be used as data in completing the teacher's one evaluation as is outlined and required by State Statute 33-514.

*SEA guidelines will likely result in differentiated professional development that meets the needs of teachers:*

Both principals and teachers will be held accountable for progress against goals set forth in an Individualized Professional Performance Plan. The beginning performance plan shall be established from baseline performance scores articulated as part of the initial certification requirement, implemented through teacher and administrator preparation programs.

Administrators will monitor and support individualized teacher growth over time using this plan and its subsequent revisions. Central district offices will likewise continually monitor principal performance goals, provide feedback, and adjust support for the principal as needed.



*f. Idaho's Educator Evaluation System will be used to inform personnel decisions.*

Beginning with evaluations conducted during the 2011-12 school year, evaluations provide a basis for making decisions in the areas of hiring, compensation, promotion, assignment, professional development, earning, and retaining personnel. See Idaho Code 33-513 through 33-515.



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**Table 39**  
**Implementation Timeline for Proposed Rule Changes**

Implementation Timeline for Proposed Rule Changes					
Key Milestone or Activity	Detailed Timeline	Party or Parties Responsible	Evidence (Attachment)	Resources (e.g., staff time, additional funding)	Significant Obstacles
The sample calendar with suggested timeframe for evaluation and types of data to be collected which will meet state approval to draw fair and consistent results will be presented for approval to the State Board of Education	April-June 2012	SEA via Idaho Department of Education	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Conditional of State Board of Education approval
Legislation in place to require teacher evaluations to be reported individually and based upon 4 ranking determinations; not proficient, basic, proficient, and distinguished	Spring 2013	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Contingent upon legislative approval



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<b>Implementation Timeline for Proposed Rule Changes</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
Legislation approval for recommended framework for evaluating school administrators that includes multiple measures, to include 50 percent of the evaluation based upon student growth	Spring 2013	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Contingent upon legislative approval
Legislative approval concerning the requirement of an individualized administrator evaluation rating system with a ranking of not proficient, basic, proficient, and distinguished that is transparent and reliable	Spring 2013	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Contingent upon legislative approval



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<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
Legislative approval concerning the Performance Plan Framework that will form the basis of subsequent evaluations and allow districts to assess growth, development, and achievement	Spring 2013	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Contingent upon legislative approval
Legislative approval for principals accountable for progress against goals laid out in the principal's Professional Performance Plan that addresses – inter-rater reliability, and the framework for districts to continually monitor principal performance goals, provide feedback, and adjust support for the principal as needed	Spring 2013	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Contingent upon legislative approval



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<b>Implementation Timeline for Proposed Rule Changes</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
All charters and districts must report teacher evaluations according to 4-tiered ranking system; not proficient, basic, proficient, and distinguished	Spring 2013	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Contingent upon legislation approval
1. Create language in Administrative Rule (or Statute) that provides a systemic way to monitor and support a process for ensuring that all measures that are included in determining performance levels are valid measures, e.g. measures that are clearly related to increasing student academic achievement and school performance, (including measures in non-tested subjects and grades)					



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<b>Implementation Timeline for Proposed Rule Changes</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
2. Create language in Administrative Rule (or Statute) to ensure that evaluation measures are implemented in a consistent and high-quality manner across schools within a District					
Spring 2013	SEA via Idaho Department of Education	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Conditional of State Board of Education approval	
Legislative approval for the sample calendar with suggested timeframe for evaluation and types of data to be collected which will meet state approval to draw fair and consistent results	Spring 2013	ISDE	No evidence at this time - Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	Idaho Dept. of Education Staff	Contingent upon legislative approval



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<b>Implementation Timeline for Proposed Rule Changes</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
Public comment period of systemic way to monitor and support a process for ensuring that all measures that are included in determining performance levels are valid measures, e.g. measures that are clearly related to increasing student academic achievement and school performance, (including measures in non-tested subjects and grades) and policy to ensure that evaluation measures are implemented in a consistent and high- quality manner across schools within a District	Fall 2013	SEA via Idaho Department of Education	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	ISDE Staff Time  Additional funding necessary but amount unknown at this time	Resources for Technical Assistance and Support



**3.B ENSURE LEAS IMPLEMENT TEACHER AND PRINCIPAL EVALUATION AND SUPPORT SYSTEMS**

*The SEA's process for ensuring that each LEA develops, adopts, pilots, and implements, with the involvement of teachers and principals, evaluation and support systems consistent with the SEA's adopted guidelines that are likely to lead to high-quality local teacher and principal evaluation and support systems:*

The SEA has developed a timeframe for the development and implementation of an educator evaluation system that involves stakeholders in the process, incorporates support and accountability for districts, and will likely lead to high quality local teacher and principal evaluation systems. This work was begun in 2009, focusing on teacher evaluation, and has continued to evolve with the implementation of Students Come First and the recent work of the Administrator Evaluation Focus Group. A timeline of all events related to this work, past, present, and planned for the future appears below:

**Table 40  
Timeline of Events Related to ISDE Implementation  
of Evaluation Policy**

<b>Timeline</b>	<b>Event(s)</b>
February 2009	Presented Teacher Performance Evaluation recommendations to the Idaho Legislature
April 2009	The State Board of Education adopted as a temporary proposed rule the recommendations of the Teacher Performance Evaluation Task Force- IDAPA 08.02.02.120
August 2009	The ISDE sponsored Regional Trainings for Administrators on utilizing the Danielson Framework for teacher evaluation purposes. Districts worked with stakeholders to create models
February 2010	Districts were required to submit their proposal models to ISDE for review and approval. District's model had to be signed by representatives of the Board of Trustees, administrators, and teachers
March 2011	Temporary proposed Administrative Rules formally approved by the Legislature
2010-2011 School Year	At a minimum, districts began piloting their approved Teacher Performance Evaluations
March 2011	Students Come First legislation enacted requiring all districts and public charter schools to work with stakeholders to (1) adopt a policy to include student achievement data as part of their evaluation model and (2) adopt a policy to include parent input as part of their evaluation model



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Timeline	Event(s)
2011-2012	Districts begin full implementation of their teacher evaluation model. All district and public charter school teacher and principal evaluation models require review and approval by ISDE and are posted to the State's website along with the results of all teacher and principal evaluations in accordance with the American Recovery and Reinvestment Act reporting guidance
December 2011	ISDE convenes stakeholder group to define a framework for evaluating administrators
March 2012	ISDE will convene an Evaluation Capacity Taskforce to formally determine a systematic way to monitor and support districts to ensure that all measures used in determining performance are valid and can be implemented in a quality manner
2012	The State Board of Education will adopt as a Temporary and Proposed Rule, the recommendations of the Administrator Evaluation Focus Group, IDAPA 08.02.02.121 beginning formal promulgation of rule
2012-2013 School Year	Districts begin implementation of teacher evaluation models that provide for multiple measures to include, at a minimum, 50 percent student growth measures and parental input for all educators. Districts will additionally develop and adopt local evaluation models for administrators based upon Temporary Proposed Rule
2013-2014 School Year	Districts begin piloting principal evaluation models and submit plans to the ISDE for review and approval before formally adopting that model district wide
2014-2015 School Year	Full implementation of principal evaluation models. ISDE will begin monitoring

*ISDE has a process for reviewing and approving an LEA's teacher and principal evaluation and support systems to ensure that they are consistent with the SEA's guidelines and will result in the successful implementation of such systems.*

Every school district and public charter school first submitted its teacher evaluation model to ISDE for review and approval in February 2010. To be approved, the evaluation model had to meet the minimum Statewide standards required by Idaho laws and rules. Models must address performance levels, reliability and validity, and ongoing training and professional development. A team of reviewers at ISDE, trained in the framework, review and approve the evaluation models. (See Attachment 24 - Teacher Evaluation Standards and Requirements Rubric). Plans not approved were returned to the districts, highlighting recommendations for change. Plans were then revised and resubmitted to ISDE for review and approval. Once approved, any changes made to a district's evaluation model must be resubmitted to ISDE.



As a result of Students Come First, school districts have begun revising evaluation plans for another round of State reviews. Additionally the ISDE is developing guidance for administrator evaluations that will be approved prior to the 2012-13 school year. These requirements will also need to be reflected in revised educator evaluation plans.

In order to allow districts to be purposeful in planning, and to maximize stakeholder input, ISDE will allow districts to use the 2012-13 school year to draft, discuss, and preliminarily adopt district policy. By the 2013- 14 school year, the district's evaluation administrator model must be implemented in a pilot form (at minimum) and final drafts of the district's revised evaluation plan that included processes and measurements to evaluate both teachers and administrators must be submitted to ISDE for review and approval no later than January 1, 2014. (See Attachment 23 – Proposed Board Rule Change; IDAPA 08.02.02.120.08 and IDAPA 08.02.02.121.07)

*ISDE's process for ensuring that an LEA develops, adopts, pilots, and implements its teacher and principal evaluation and support systems with the involvement of teachers and principals. According to current Idaho Administrative Rule, IDAPA 08.02.02.120, school districts must implement teacher evaluation processes and support systems with the involvement of education stakeholders:*

Each school district board of trustees will develop and adopt policies for teacher performance evaluation in which criteria and procedures for the evaluation of certificated personnel are research based and aligned to Charlotte Danielson's Framework for Teaching Second Edition domains and components of instruction. *The process of developing criteria and procedures for certificated personnel evaluation will allow opportunities for input from those affected by the evaluation; i.e., trustees, administrators and teachers. The evaluation policy will be a matter of public record and communicated to the certificated personnel for whom it is written.*

As part of ISDE's review process, proof of stakeholder participation must be submitted by each district in order to qualify its educator evaluation plan for State approval. (See Attachment 24 - Teacher Evaluation Standards and Requirements Rubric). As noted above, a similar system for developing, piloting, implementing, and monitoring an evaluation framework for administrators is being crafted. ISDE will ensure that stakeholder participation is a key part of developing the State's framework, as well as a requirement for all districts in adopting their own educator evaluation systems within this framework. The Department held its first meeting with representatives from all major educational stakeholder groups on December 15, 2011. Meetings will continue monthly to gather input that will eventually shape the administrator evaluation framework. ISDE has created a webpage where interested stakeholders and members of the public can track the group's progress, find links to the research guiding ISDE discussions, and provide feedback. The process and timeline for this work is described in greater detail in section 3.A.i.

*The SEA's process ensures that all measures used in an LEA's evaluation and support systems are valid, meaning measures that are clearly related to increasing student academic achievement and school performance, and are implemented in a consistent and high-quality manner across schools within an LEA.*



In March 2010, the Idaho Legislature formally approved Idaho's Statewide Framework for Teacher Performance Evaluations.

The legislation formalized requirements previously prescribed through a temporary administrative rule. In order to assist districts in adopting and piloting the system with consistency, ISDE produced and distributed implementation guidance Statewide, and posted the information on its website. (See Attachment 25- Teacher Performance Evaluation Implementation Guidelines;

<http://www.sde.idaho.gov/site/teacherEval/docs/implementation/Implementation%20Guidelines.doc>).

The process and timeline for this work is described in greater detail in section 3.A.i.

The SEA's process ensures that all measures used in an LEA's evaluation and support systems are valid, meaningful measures that are clearly related to increasing student academic achievement and school performance, and are implemented in a consistent and high-quality manner across schools within an LEA. As has been noted earlier, the Students Come First legislation (March 2011) further solidified the State's commitment to developing great teachers and leaders, with the goal for every student to have a highly effective teacher every year of his or her schooling. At the center of this statute is an emphasis on valid and reliable teacher and administrator evaluations. These evaluations build on Idaho's past work to create a Statewide framework for educator performance evaluations ensuring that all educator evaluations involve multiple measures, with at least 50 percent of the evaluation based upon growth in student achievement. These changes, preliminarily approved in 2011, await final legislative approval during the current session (See Attachment 26 – Revised IDAPA 08.02.02.120 Legislative Approval 2012). In order to be approved by the State, each district's teacher evaluation model must include the following:

- **Performance Levels:** Each school district must identify descriptors of performance levels for each domain. Examples of performance levels a district might identify include: not proficient, basic, proficient, and distinguished. In recognition of research into mastery, proficient performance in a domain is meeting 80 percent of the components. Beyond this, the ISDE will propose Board Rule change to be effective as of Spring 2012, in which all educators will be mandatorily ranked using the 4-tiered system referenced above.
- **Reliability and Validity:** Idaho's Teacher Performance Evaluation requires that each district's evaluation tool and process be valid and reliable and utilize data to support same. Districts will report content validity data within the first year - gather input from those being evaluated on the indicators within components and domains (this meets the requirements in the Idaho Administrative Code 08.02.02.120). Reliability is demonstrated through the plan for ongoing training for evaluators to ensure that different evaluators recognize the same behaviors at the same level of performance. In addition, ISDE is piloting a certification process for ensuring inter-rater reliability among evaluators, discussed in greater detail below. Proposed board rule will also require proof of proficiency in assessing teacher performance.



- **Training and Professional Development:** As part of each district's process and implementation of a teacher evaluation model, there must be a plan for ongoing training for evaluators/administrators as well as professional development for teachers on the district's evaluation tool and process. Beyond this, the ISDE will propose Board Rule change to be effective as of Spring 2012, in which proposed Board Rule will additionally require an Individualized Professional Performance plan to track growth and achievement.

A means for providing evidence of inter-rater reliability is being piloted through ISDE at this time. To further promote rigor and reliability in evaluations, ISDE is currently offering opportunities for school districts to pilot the *Teachscape Danielson Proficiency Assessment*. This is intended to achieve inter-rater reliability as it relates to evaluation based upon classroom observation (See Attachment 27 – Danielson Brochure - Proficiency Assessment - <http://www.teachscape.com/products/danielson-proficiency-system> ).

This pilot effort involves 50 administrators from northern Idaho school districts. The participants receive extensive training in conducting classroom observations, conferencing, and gathering artifacts for assessment. Each participant is then required to take a proficiency assessment to achieve certification in accurate evaluation. In January 2012, the pilot was expanded to include over 150 more administrators and teacher leaders in two additional regions of the State. The findings of this pilot will be used to inform further training and to explore building capacity across the state. (See Attachment 28 – Invitation to Participate.)

As noted in section 3A.ii(c), subsection *ii*, ISDE will also convene an Evaluation Capacity Taskforce charged to determine a systemic way to monitor and support districts to ensure that all measures used to determine performance are valid measures, and can be implemented in a quality manner. By March 2012, this group comprised of key ISDE staff, external stakeholders and consultants from the Northwest Regional Comprehensive Center will come together to develop a theory of action around measuring educator performance, supporting related professional development, and creating a process for ISDE to monitor school districts' systems.

The goal of the group will be to produce a Statewide system of support and accountability that will ensure consistent and sustainable implementation of valid evaluation systems for both teachers and administrators. This work will also include compiling a menu of recommendations for measuring student growth in grades and subjects in which assessments are not required under ESEA section 1111(b)(3) that will meet State approval.

Not later than August of 2012, additional amendments to policies created by this taskforce will be presented for preliminary approval through the State Board of Education. Subsequently, following the rules promulgation process of the proposed amendments, ISDE will begin monitoring all district plans beginning in Fall 2015.



*The SEA's plan to be successful in ensuring that LEAs meet the timeline requirements by piloting evaluation and support systems no later than the 2013-2014 school year and implementing evaluation and support systems consistent with the requirements described above no later than the 2014-2015 school year.*

As described throughout this document, ISDE has set forth a timeline for policy development and school district adoption that is consistent with the requirements of the ESEA Waiver Guidelines (See Attachment 23 – Proposed Board Rule Change) that includes key implementation dates. As has been evidenced throughout the State's responses to the questions set forth in this Principle, the timelines and various activities to be conducted have been determined to ensure that Idaho's evaluation and support systems will be piloted no later than the 2013-14 school year. That will be followed by full implementation in the 2014-15 school year; if not earlier.

*Timelines that reflect a clear understanding of what steps will be necessary and reflect a logical sequencing and spacing of the steps necessary to implement evaluation and support systems consistent with the required timelines.*

ISDE is confident that the timeline included within this ESEA flexibility submittal is logical and reasonable. Though there is much to be done within the timeframe, there is a sense of urgency and a commitment from all stakeholder groups that makes the plan reasonable. With the implementation of the teacher evaluation, and processes for approving district evaluation plans already in place, Idaho has a good foundation on which to build, based upon successful precedent.

The greatest challenge to the timeline, however, is that at this time, funds to fully support the professional development for school districts are scarce. The state will continue to use Title IIA State Project funds to provide technical assistance and training to districts to implement evaluation systems, but without further funding the speed at which the state will be able to deeply assist and regularly monitor in every district may be slowed. The State will not compromise on fidelity of implementation; however, it is always a challenge to reach geographically removed areas. The State's ability to secure adequate resources, outside of Title IIA, will ultimately dictate the speed of full implementation statewide.

*The SEA's plan for providing adequate guidance and other technical assistance to LEAs in developing and implementing teacher and principal evaluation and support systems that are likely to lead to successful implementation.*

The ISDE is confident that the components detailed above will ensure adequate guidance and technical assistance to LEAs in developing and implementing teacher and principal evaluation and support systems that will likely lead to successful implementation. A summary of some of these key activities follow:



- **Creation of Evaluation Capacity Taskforce.** This group will focus on the development of a theory of action linked to measuring educator performance, supporting related professional development, and creating a process for the ISDE to monitor school district's educator evaluation systems. The goal of the group will be to produce a Statewide system of support and accountability to ensure consistent and sustainable implementation of valid evaluation systems.
- **ISDE Policy Guidance.** ISDE will have all policy in place by Spring 2012 and allow districts to use the 2012-13 school year to draft, discuss, and preliminarily adopt district policy for administrator evaluation systems, as well as finalize changes to teacher evaluation systems. By the 2013-14 school year, the district's evaluation models must be implemented in a pilot form (one school per district, at minimum) and the ISDE will establish a website to capture district reporting, and will solicit best practices from districts across the state. Final drafts of the revised educator evaluation plan must be submitted to ISDE for review and approval no later than January 1, 2014
- **Established System for Reviewing and Approving Evaluation Plans.** Idaho's Teacher Performance Evaluation policy requires that each school district's evaluation tool and process be valid and reliable and utilize data-based decision making practices for professional development. Any district plan that does not meet ISDE requirements is returned with comment to be revised and resubmitted.

Districts report content validity data within the first year and gather input from those being evaluated (this meets the requirements in the Idaho Administrative Code 08.02.02.120). Reliability is demonstrated through the plan for ongoing training for evaluators to ensure that different evaluators recognize the same behaviors at the same level of performance. Proposed rule changes will further require "evidence of proficiency in evaluating teacher performance based upon the Danielson Framework for Effective Teaching." As above, an additional round of ISDE approval will be required for all evaluation systems once all changes are in effect, and administrator evaluation plans are fully in place.

- **Face-to-Face Danielson Framework Training.** Training will be provided across the state for administrators and teacher leaders. Training in the *Framework for Teaching* will increase the likelihood of effective instructional leadership within schools, and ensure inter-rater reliability in performing teacher evaluations.

A means for providing legally defensible evidence of inter-rater reliability is being piloted through ISDE at this time. To further promote rigor and reliability in evaluations, ISDE is currently offering opportunities for school districts to pilot the *Teachscape Danielson Proficiency Assessment* and for school leaders to become "certified" evaluators.

While funds to fully support school districts in the implementation of teacher and principal evaluations are limited, the ISDE will leverage existing resources to implement these initiatives. How far ISDE will reach, and how timely the necessary technical assistance and support can be provided as well as regular monitoring of systems adopted by districts will be dependent upon staff time and available resources.



At minimum, the statute and rule changes implemented by the State will eventually lead to successful implementation.

*Planned pilot is broad enough to gain sufficient feedback from a variety of types of educators, schools, and classrooms to inform full implementation of the LEAs evaluation and support system.*

Each school district will pilot the educator evaluation framework within their local context in the 2013-14 school year. As with the teacher evaluation system, every district was required to pilot in at least one school a year prior to full implementation. This shall also be the case with the revised teacher evaluation system and the new administrator evaluation system.

Because each school district across the state will be piloting to some degree, the ISDE is confident that the sample is broad enough, and sufficient feedback can be gathered. The ISDE will establish a website to capture district reporting, and will solicit best practices from districts across the state. Additionally, the newly established longitudinal data system will capture individual teacher evaluations from every district across the state to provide baseline data to ISDE.



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*3.B Idaho Department of Education's process for ensuring that each LEA develops, adopts, pilots, and implements, with the involvement of teachers and principals, including mechanisms to review, revise, and improve, high-quality teacher and principal evaluation and support systems consistent with the SEA's adopted guidelines.*

**Table 41  
Implementation and Capacity Building Timeline**

Implementation and Capacity Building Timeline					
Key Milestone or Activity	Detailed Timeline	Party or Parties Responsible	Evidence (Attachment)	Resources (e.g., staff time, additional funding)	Significant Obstacles
<b>Phase I implementation-pilot (20% of districts)</b> <ul style="list-style-type: none"> <li>Principals held accountable for progress against goals laid out in the principal's Professional Performance Plan that addresses inter-rater reliability</li> <li>Create framework for districts to continually monitor principal performance goals, provide feedback, and adjust support for the principal as needed</li> </ul>	2013-14 School Year	ISDE	<p>No evidence at this time</p> <p>Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts</p>	<p>ISDE Staff Time</p> <p>Additional funding necessary but amount unknown at this time</p>	<p>Concern about sufficient resources for technical assistance and support</p> <p>Managing continuing capacity</p> <p>Continued funding source</p>



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<b>Implementation and Capacity Building Timeline</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<ul style="list-style-type: none"> <li>Legislation concerning a systemic way to monitor and support a process for ensuring that all measures included in determining performance levels are valid, e.g. measures that are clearly related to increasing student academic achievement and school performance (including measures in non-tested subjects and grades)</li> <li>Policy to ensure that evaluation measures are implemented in a consistent and high-quality manner across schools within a district</li> </ul>	Spring 2014	ISDE	<p>No evidence at this time</p> <p>Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts</p>	<p>ISDE Staff</p> <p>Additional funding necessary but amount unknown at this time</p>	<p>Limited funding at this time</p> <p>Contingent upon legislative approval</p>
<ul style="list-style-type: none"> <li>All districts and charters will implement the Performance Plan Framework that will form the basis of subsequent evaluations and allow districts to assess growth and development</li> </ul>	Fall 2014	ISDE	<p>No evidence at this time.</p> <p>Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts</p>	<p>ISDE Staff</p> <p>Additional funding necessary but amount unknown at this time</p>	<p>Limited funding at this time.</p> <p>Contingent upon legislative approval</p>



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<b>Implementation and Capacity Building Timeline</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<b>Phase II full implementation–Statewide</b> <ul style="list-style-type: none"> <li>Principals held accountable for progress against goals laid out in the principal's Professional Performance Plan that addresses inter-rater reliability</li> </ul> Create framework for districts to continually monitor principal performance goals, provide feedback, and adjust support for the principal as needed	2014-15 School Year	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	ISDE Staff  Additional funding necessary but amount unknown at this time	Limited funding at this time  Contingent upon legislative approval
<ul style="list-style-type: none"> <li>ISDE will establish a process of appeals for districts that wish to contest a plan not approved. This will be accomplished through the same taskforce that will determine a systemic way to monitor and support a process for ensuring that all measures that are included in determining performance levels are valid measures, e.g. measures that are clearly related to increasing student academic achievement and school performance, and are implemented in a consistent and high-quality manner across schools within a district</li> </ul>	Fall 2014-Spring 2015	ISDE	No evidence at this time  Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts	ISDE Staff  Additional funding necessary but amount unknown at this time	Limited funding at this time  Contingent upon legislative approval



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<b>Implementation and Capacity Building Timeline</b>					
<b>Key Milestone or Activity</b>	<b>Detailed Timeline</b>	<b>Party or Parties Responsible</b>	<b>Evidence (Attachment)</b>	<b>Resources (e.g., staff time, additional funding)</b>	<b>Significant Obstacles</b>
<ul style="list-style-type: none"> <li>The educator evaluation plan will be thoroughly developed in multi-phases. The final stage will bring together stakeholders who have piloted the various State mandated programs to gather information and evaluate further modifications to State policy as a result of stakeholder feedback</li> </ul>	Fall 2014-Spring 2015	ISDE	<p>No evidence at this time</p> <p>Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts</p>	Additional funding necessary but amount unknown at this time	<p>Limited funding at this time</p> <p>Contingent upon legislative approval</p>
<ul style="list-style-type: none"> <li>System will be created by ISDE and stakeholders concerning the continuous improvement and modification of educator evaluations in comparison to student achievement and stakeholder response</li> </ul>	Fall 2014-Spring 2015	ISDE	<p>No evidence at this time.</p> <p>Evidence will be available following May 2012 Administrator Evaluation Focus Group minutes and artifacts</p>	Additional funding necessary but amount unknown at this time	<p>Limited funding at this time</p> <p>Contingent upon legislative approval</p>



In an effort to ensure support from a variety of stakeholders and policymakers, the State Department of Education has included a number of Legislators, key policy makers and legislative advocates on both the Administrator Evaluation Focus Group and the Evaluation Capacity Task Force. By doing so, we ensure that we have built in sponsors and supporters as any recommendations that come out of these committees go through our rule making and legislative process. Because of this, and the support we have received from these policy makers, the ISDE does not believe that a contingency plan is as important as the demonstration of a willingness to adapt and improve the key elements based on the feedback and input of stakeholders.

This willingness to change will enable the process to proceed without interruption. Policy makers included on the committees include:

- Senator John Goedde, Senate Education Committee Chair, Idaho State Senate
- Senator James Hammond, Idaho State Senate
- Senator Steve Bair, Idaho State Senate
- Roger Brown, Senior Special Assistant for Education and Government, Office of the Governor
- Allison McClintick, K-12 Education and Policy Manager, Office of the State Board of Education
- Selena Grace, Chief Academic Officer, Office of the State Board of Education,
- Penni Cyr, President, Idaho Education Association,
- Robin Nettinga, Executive Director, Idaho Education Association,
- Karen Echeverria, Executive Director, Idaho School Boards Association,
- Rob Winslow, Executive Director, Idaho Association of School Administrators

As stated throughout the waiver, the ISDE has solicited the input and involvement of all major stakeholder groups representing teachers (IEA), principals and superintendents (IASA), school board members (ISBA), parents (Idaho PTA), legislators, State Board of Education staff, higher education and other education experts. In addition, in accordance with IDAPA 08.02.02.120, all LEA teacher and principal evaluation models and policies must be developed with input and ongoing review from those affected by the evaluation; i.e., trustees, administrators and teachers. Once approved by the LEA, the revised plans will be submitted to the ISDE for review and approval for alignment to Idaho statute and administrative rule.

The recent re-organization of the ISDE to include the Division of Great Teachers and Leaders, included the creation of a new position, Evaluation Coordinator, dedicated to evaluation and educator quality. This individual is charged with leading the review and approval efforts of all teacher and principal evaluations. In spring 2013, another FTE will be added for the purpose of providing technical assistance to districts and conducting monitoring activities.



In addition, Idaho's Professional Standards Commission shall form an additional subcommittee to work with the state's evaluation coordinator to provide ongoing review and inform appropriate revisions of the state's frameworks for educator evaluation.

The State purposefully chose the Danielson Framework for Teaching as the evaluation model for all Idaho teachers based upon its focus on instruction and differentiation. ISDE finds that the Framework for Teaching is specific enough to use for general education teachers, but broad enough that it is applicable to all teaching settings since it draws from instructional strategies and methods that have been proven both in the context of teaching English Learners (LEP) and students with disabilities (SWD). For example, in Domain 1 (Planning and Preparation), the framework addresses keeping student outcomes in mind. For LEP students, this would include English Language Development standards; for SWD, this would include IEP goals.

Furthermore, Domain 3 (Instruction) addresses assessing students and demonstrating responsiveness to their differentiated needs. For LEP students, this would include ensuring progress according to language development benchmarks and adjusting instruction when they are not on track; for SWD, this certainly applies to progress toward IEP goals and access to and progress toward grade level standards and the adjustment of instruction when a student is not making progress.

However, in order to ensure the long term development of high quality evaluation, ISDE is also in the research and development process of developing a more specific evaluation instruction for the wide breadth and depth of Special Education teachers. In partnership with Boise State University, a research project is underway called RESET: Recognizing the Effectiveness of Special Education Teachers. The RESET Project will develop an instrument tool based on the Danielson Framework for Teaching that expands and extrapolates some of the more specific and unique characteristics of teaching SWD who may be identified for services for any number of reasons. This research project began in Fall 2010 and will be completed in May 2013. When completed, the tool will be disseminated to Idaho LEAs for them to adopt and use at their discretion.

In regards to support, IDAPA 08.02.02.120 requires that each LEA develop a teacher evaluation model and policy that will be used to identify proficiency and define a process that identifies and assists teacher in need of improvement and to provide remediation for all teachers in those instances where remediation is determined to be an appropriate course of action. It is also required that each evaluation policy have a plan for collecting teacher evaluation data for all teachers and using that data to inform professional development.

~~While~~ The ISDE will have formal student growth measures based on statewide assessments (i.e., AGP, SGP) ready by the end of spring 2012 in order to include them in our accountability system and the ISDE will continue to provide training to district and school leaders on what these measures mean; ~~the evaluation system is not dependent upon the readiness of these measures.~~



Idaho Code 33-514 requires that growth in student achievement make up 50% of a total evaluation, this is not limited to nor must it include the accountability growth measures.

With the revisions being proposed to IDAPA 08.02.02.120, a portion of the 50% of a teacher's evaluation that is based on growth in student achievement must be based on growth as determined by the Idaho Student Achievement Test (ISAT) and Idaho's growth model (See Attachment 29). Beyond that, LEAs have the authority to select growth measures that meet their unique needs and ISDE is providing guidance and examples of such through the work of the Evaluation Capacity Task Force.

As stated throughout the waiver, the ISDE has solicited the input and involvement of all major stakeholder groups representing teachers (IEA), principals and superintendents (IASA), school board members (ISBA), parents (Idaho PTA), legislators, State Board of Education staff, higher education and other education experts.

In addition, in accordance with IDAPA 08.02.02.120, all LEA teacher and principal evaluation models and policies must be developed with input and ongoing review from those affected by the evaluation; i.e., trustees, administrators and teachers. Once approved by the LEA, the revised plans will be submitted to the ISDE for review and approval for alignment to Idaho statute and administrative rule.

The recent re-organization of the ISDE to include the Division of Great Teachers and Leaders, included the creation of a new position, Evaluation Coordinator, dedicated to evaluation and educator quality. This individual is charged with leading the review and approval efforts of all teacher and principal evaluations. In spring 2013, another FTE will be added for the purpose of providing technical assistance to districts and conducting monitoring activities. In addition, Idaho's Professional Standards Commission shall form an additional subcommittee to work with the state's evaluation coordinator to provide ongoing review and inform appropriate revisions of the state's frameworks for educator evaluation.

Idaho believes that we are on track and will be able to provide sufficient training and time for implementation of the growth measures based on the ISAT and those being recommended by the Evaluation Capacity Task Force. As is stated in our timeline, Idaho LEAs will begin piloting the sample growth measures and provide feedback to the ISDE during the 2012-2013 school year with full implementation beginning in the 2014-2015 school year by districts who wish to adopt the sample growth measures developed by the Evaluation Capacity Task Force.

Dedicated Funds and Dedicated FTEs for Staffing Oversight of Evaluation and Monitoring. The Idaho State Department of Education is dedicated to supporting the ongoing work around educator evaluation and monitoring evaluation systems. The recent re-organization of the ISDE to include the Division of Great Teachers and Leaders, included the creation of a new position, Evaluation Coordinator, dedicated to evaluation and educator quality. This is just one indication of Idaho's commitment to ensuring that our evaluation system is implemented with fidelity and will be successful.



In addition, Idaho's Professional Standards Commission shall form an additional subcommittee to work with the state's evaluation coordinator to provide ongoing review and inform appropriate revisions of the state's frameworks for educator evaluation.

Title IIA State Project funds, in combination with district Title IIA funds and dedicated state funds, will keep the work on pace, and the SDE will continue to leverage partnerships with the Title I SIG division and the work of the Idaho LEADS project funded by the Alberstons Foundation. In order to further coherently integrate and distribute the need for support in this area of implementation, work surrounding teacher and administrator evaluation will be included as appropriate in the state's accountability and support programs, such as, Idaho Building Capacity project, Superintendents Network of Support and the Principal Academy of Leadership.



### PRINCIPLE 3: SUMMARY

Idaho has created, and continues to develop, statewide frameworks for performance evaluations using multiple measures to improve the craft of teaching and instructional leadership. Recent legislation guarantees that 50 percent of teacher and administrator performance evaluations will be based on student achievement, and that districts must include parent input as part of teacher and school-based administrator performance evaluations. Additionally, teacher observations are conducted consistently across the state, based on the Danielson Framework for Teaching, and are an integral part of a teacher's overall performance evaluation. The state's goal is to increase the frequency of interaction between teachers and administrators around this model, and ensure that data gathered from evaluations informs ongoing professional growth.

The means for capturing growth data for teachers shall begin with an Individual Professional Performance Plan that will be part of the summative evaluation completed in pre-service, prior to initial certification. This plan will be carried throughout a teacher's career, revised with every subsequent evaluation to provide insight into, and evidence of, a teacher's professional growth. To ensure that every teacher evaluation results in meaningful, valid feedback that will inform this professional learning plan, Idaho has made it a priority to emphasize the principal's role as an instructional leader; proficient in assessing teacher performance and carrying out reflective conversations to promote effective classroom practice. To this end, proof of proficiency in assessing teacher performance will become a requirement of every Idaho principal.

Currently, the Idaho State Department of Education is working with educational stakeholder groups to specifically identify a full set of requirements for administrators, developing a statewide framework for administrator evaluations that will move Idaho closer to its goal to having an effective teacher in every classroom. This work is underway and should be completed by May 2012. Once established, the State intends to use this framework to make necessary changes within administrator preparation programs. A key component will be to also implement Individual Professional Performance Plans for administrators prior to initial certification.

The State will continue to assess and refine educator evaluation systems through monitoring, and is committed to creating guidance, providing technical assistance, and making policy adjustments according to research in best practices and data collected from the field. Idaho will continue to look for new partnerships and leverage existing partnerships to accomplish the highest quality and greatest possible consistency in evaluation systems across the state.

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~~SET-ASIDE REQUIREMENTS AND OPTIONAL FLEXIBILITY~~

**Professional Development Set-Aside (10 Percent)**-- A One or Two Star school or district that is in the Rapid Improvement Plan or Turnaround Plan category is required to set aside an amount equal to 10 percent of Title I-A funds for professional development. ~~This professional development set-aside will follow the same regulatory structure as that which exists under current NCLB requirements for schools in school improvement, corrective action, or restructuring and for districts in improvement or corrective action.~~

A district is required to set aside an amount equal to 10 percent of the Title I-A funds, ~~as defined in current regulations.~~ However, the district may substitute state or local funds in an amount equal to or greater than the required 10 percent of Title I-A funds, if it has reason to do so in order to promote financial flexibility. In the event that a district takes this flexibility, it will be required to submit documentation to the state of the amount budgeted, the amount spent, and the actual activities and expenditures out of state and local funds. In the case of non-Title I-A funded schools in the Rapid Improvement Plan or Turnaround Plan categories, and because such schools are contributing to the district's inability to meet the needs of all learners, a district must demonstrate that it has devoted professional development services to that school out of state or local funds or other grant funding sources (e.g., Title II-A district allocation or the district level professional development set-aside) in an amount equal to or greater than the amount that would otherwise be required if the school were operating a Title I program<sup>+</sup>. The amount that would be required under Title I can be determined by taking 10 percent of the amount defined in the Idaho Consolidated State and Federal Grant Application (CFSGA) budget section that is automatically calculated by the State regarding the minimum amount of funds that would need to be allocated to the school if it were to operate a Title I program.

**Family and Student Support Options (10 Percent)**—~~Family and Student support options, in the form of School Choice or Supplemental Tutoring Services, are made available to eligible students who are struggling academically while the school or district improves its overall performance. This set-aside is targeted at providing families and students with additional or different academic opportunities while their local school undergoes school improvement planning and implementation activities.~~

~~As mentioned elsewhere, School Choice STS will only be a requirement in One and Two Star (Rapid Improvement Plan and Turnaround Plan) contexts, but districts may choose to offer STS voluntarily in other categories<sup>2</sup>. If the district or any of its schools is in the One or Two Star (Rapid Improvement Plan or Turnaround Plan) categories, the district is required to set aside 10 percent of the district allocation of Title I-A funds for School Choice and Supplemental Tutoring~~

<sup>+</sup> See the flexibility section of this appendix regarding options for how to fund Professional Development in non-Title I funded schools.

<sup>2</sup> See the flexibility section of this appendix regarding options for providing tutoring as an option when not required of the school or district.



~~Services. The district may substitute, if documented in the CFSGA, the use of state, local, or other appropriate grant funds (e.g., 21<sup>st</sup> Century Community Learning Center grants) equal to this amount in order to meet this requirement.~~

~~*Rule for reduction of set aside:* If the per pupil allocation of Title I funds multiplied by the number of eligible students is equal to an amount less than 10 percent of the Title I-A set aside, and the district has met its choice-related transportation obligations, the district may reduce its set aside to the lower amount. In this case, the district must document its calculation in the CFSGA and seek approval from the state's Title I Director prior to reducing the set aside.~~

~~**Flexibility for Districts**—In the past, school districts were required to set aside funds for specific activities when placed into the improvement timeline (e.g., professional development, school choice, and supplemental education services). An unintended consequence of the set aside requirements was that if the school or district was no longer in improvement, the district no longer had the set aside at its disposal. So, if set aside funds were contributing to successful performance, the district lost some of its ability to continue the practices that led to that success. In order to solve this problem of practice, Idaho will consider all of its Five, Four, and Three Star Districts and Schools to be in a state of continuous improvement under the new Idaho Accountability Plan and will provide districts with flexibility. Therefore, such districts that do not have One or Two Star (Turnaround Plan or Rapid Improvement Plan) schools will be permitted, but not required, to set aside Title I-A funds for the purpose of continuous improvement. One or Two Star districts and districts with One or Two Star schools must set aside 10 percent of their Title I-A allocation for STS; however, they may increase the amount to 20 percent. These voluntary set-asides will be implemented according to the following guidelines.~~

~~*Professional Development (District).* Under the existing ESEA authority described in 34 CFR200.52(a)(3)(iii), LEA improvement; To (a) allow districts to determine the amount of this set aside and to (b) promote system wide improvement across the district, the State expects districts to determine the will describe professional development set-aside flexibility using the following amended language in the following manner:~~

- ~~• In a Title I-A funded district that is rated a One or Two Star: (3)-The LEA **continuous** improvement plan may must ... (iii) aAddress the professional development needs of the instructional staff serving the LEA by committing to spend for professional development not an amount equal to more than 10 percent of the funds received by the LEA under subpart A, Title IA of this part for each fiscal year in which the SEA identifies the LEA **in for Rapid Improvement or Turnaroundthe Performance Plan or Improvement Plan category**. These funds—(A) mMay include funds reserved by schools for professional development under §200.41(e)(5); but (B) Maythe Rapid Improvement Plan and Turnaround Plan requirements but may not include funds reserved for professional development under section 1119 of the ESEA (i.e.g. Title IIA).~~



- The district must be able to demonstrate that the use of these funds are for targeting professional development that supports academic achievement in the core academic content areas and contributes to the district's continued ability to meet or approach performance expectations.
- These funds may be used for professional development in non-Title I funded schools provided that the district can demonstrate that such schools contribute to the district's identification as a One or Two Star District and the professional development activities are connected to the reasons for which the district was identified. However, the funds must still be used consistent with Title I requirements.

*Professional Development (School).* ~~Under the existing ESEA authority described in 34 CFR 200.41(e)(5), the School improvement plan, and to allow districts to determine the amount of this set-aside in~~ For schools in the ~~Performance Rapid Improvement~~ Plan or ~~Improvement Turnaround~~ Plan categories, the State ~~expects the district to will describe professional development set-aside flexibility at the school level using the following amended language funds in the following manner:~~

- ~~In a Title I-A funded school: (e) The school continuous improvement plan may must ... (5) p~~ Provide an assurance that the school will spend ~~not an amount equal to more than~~ 10 percent of the allocation it receives under ~~subpart Title I-A of this part~~ for each year that the school is in an ~~continuous~~ improvement status, for the purpose of providing high-quality professional development to school personnel who serve Title I students (e.g., the school's teachers, principal, and, as appropriate, other instructional staff), consistent with section 9101(34) of the ESEA.
- If the school is given authority by the district over the oversight of the expenditure of these funds, the district must be able to demonstrate during the monitoring process that the use of these funds are for targeting professional development that supports academic achievement in the core academic content areas and contributes to the school's continued ability to meet or approach performance expectations.
- In the event that the district is identified as One or Two Stars, the school professional development set-aside may be included when calculating the district's 10 percent % requirement such that the district's obligation will not exceed more than 10% percent of the district's total Title I-A allocation.

~~Supplemental Tutoring Services. Under the existing ESEA authority described in 34 CFR 200.48(a)(1-2), Funding for choice-related transportation and supplemental education services; to (a) allow districts to determine the amount of this set-aside; to (b) promote system wide improvement across the district; and to (c) target the needs of and provide extended learning time for underperforming and at-risk students; the State will describe supplemental tutoring services~~



~~flexibility at the district level using the following amended language:~~

- ~~○ For districts in the Turnaround Plan, Rapid Improvement Plan, or Continuous Improvement Plan categories: (a) Amounts permitted. (1) To pay for supplemental tutoring services, an LEA may use— (i) Funds allocated under subpart A of this part; (ii) Funds, where allowable, from other Federal education programs; and (iii) State, local, or private resources. (2) The LEA may spend an amount not more than 20 percent of its allocation under subpart A of this part.~~
- ~~○ In order to use this flexibility, the district must target the students who are most in need of support.~~
  - ~~▪ The criteria must be based on academic assessment data in Reading/Language Arts or Mathematics, but may be supplemented with other data elements that provide weight, such as those permissible and required under Targeted Assistance programs for creating a rank ordered student list.~~
  - ~~▪ Funds may be used for students in non Title funded schools, provided that the criteria established by the district indicate that these students are the most in need of extended learning time.~~
  - ~~▪ The district must also follow all procurement and design guidelines outlined in the general requirements for Supplemental Tutoring Services.~~

~~Transition Period: During the transition year (i.e., 2012-2013), ISDE will waive the requirements for Supplemental Tutoring Services (STS) and School Choice in all schools in the state. LEAs may utilize the flexibility described in the ESEA Flexibility Plan to provide STS and Choice in 2012-2013 if desired, but will not be required to do so. ISDE will utilize the transition period during the 2012-2013 school year to educate LEAs and schools on the requirements of STS and Choice, such as the process for providing a Request for Proposals. In the 2013-2014 school year, all requirements will go into full effect, including STS and Choice.~~

~~Regarding students that were previous recipients of School Choice, the LEA must continue to allow such students to remain enrolled in the school of choice through the final grade level served by that school. LEAs should plan to use the 10% STS and Choice set aside for 2012-2013 to provide for choice related transportation for such students if the student's home school is both (a) in school improvement status and (b) the school has earned Two Stars or less in Spring 2012. If the student's home school is not in improvement, or if the school has attained Three Stars or greater, the LEA is not required to pay for choice related transportation and is only required to permit students to stay enrolled in the School of Choice so as to not disrupt the student's educational experience.~~